

# Tourism, Sustainability and Recovery

## Asia Pacific Expert Outlook

**Wakayama-CTR Webinar Series 2020 Vol.2**

### **Recovering sustainably, global lessons for Japan's tourism industry**

**Wednesday, August 19 7:00-8:00PM (JST)  
@Zoom Webinar(online)**

**Organized by  
Center for Tourism Research, Wakayama University**

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UNWTO Regional Support Office for Asia and the Pacific  
Pacific Asia Travel Association (PATA)  
Kansai Tourism Bureau**



# Wakayama-CTR Webinar Series 2020

Vol.2

## Recovering sustainably, global lessons for Japan's tourism industry

Speakers:



**Graham Miller**

(Distinguished University Professor, Wakayama University / Pro-Vice Chancellor and Executive Dean, Faculty of Arts and Social Sciences, University of Surrey)



**Rochelle Turner**

(Head, Research and Insight, MaCher)



**Xavier Font**

(Professor, Tourism Marketing, School of Hospitality and Tourism Management, University of Surrey)



**Kumi Kato**

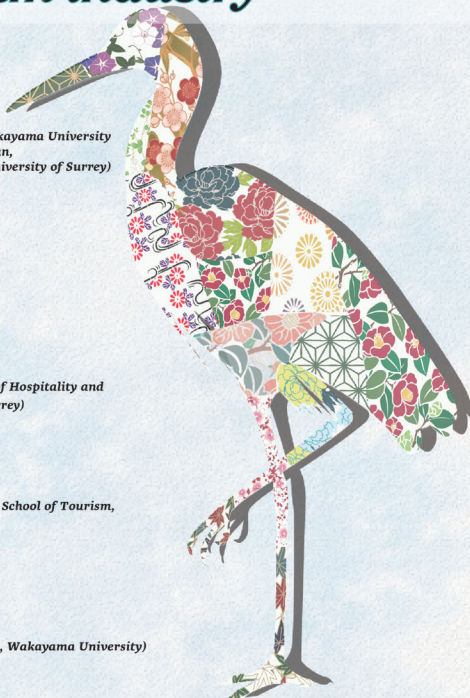
(Professor, Faculty of Tourism/Graduate School of Tourism, Wakayama University)

Moderator:



**Joseph M. Cheer**

(Professor, Center for Tourism Research, Wakayama University)



Date: **Wednesday, August 19, 2020**

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Please visit our website for details: <https://www.wakayama-u.ac.jp/ctr/>



## Speakers



### Graham Miller

Distinguished University Professor, Wakayama University / Pro-Vice Chancellor and Executive Dean, Faculty of Arts and Social Sciences, University of Surrey, UK



### Rochelle Turner

Head, Research and Insight, MaCher, USA



### Xavier Font

Professor, Tourism Marketing, School of Hospitality and Tourism Management, University of Surrey, UK



### Kumi Kato

Professor, Faculty of Tourism/Graduate School of Tourism, Wakayama University, Japan

**Joseph M. Cheer:**

Good evening, good morning, good afternoon, ladies and gentlemen, wherever you tuning into this webinar from on behalf of the Center for Tourism Research at Wakayama University in Japan. Welcome to the second webinar, in the webinar series tourism, sustainability and recovery Asia Pacific Expert Outlook. My name is Joseph Cheer, and I will be moderating the webinar tonight. I am currently Professor at the Center for Tourism Research at Wakayama University but because of COVID-19, I am joining the webinar from my hometown Melbourne in Australia. We welcome what is an international audience with participants from across Asia Pacific and beyond, and we thank you for taking the time to join us.

The Center for Tourism Research aims to be a key hub for tourism research in the Asia Pacific region, and tonight's webinar is part of an overall mission. We extend an open invitation to everyone watching this webinar to come and visit us in Wakayama. Just quickly this webinar series is run on a monthly basis and will feature speakers at the leading edge of tourism research and practice. And while the focus will be on the Asia Pacific region, the overarching emphasis is on global tourism. We also acknowledge the support of our tourism industry partners, in particular PATA, the Pacific Asia Travel Association, the UNWTO Regional Support Office for Asia and Pacific based in Japan and the Kansai Tourism Bureau.

So moving on to tonight's webinar. The title of tonight's webinar is 'Recovering Sustainably Global Lessons for Japan's tourism industry'. We are very fortunate to feature four speakers, all with considerable bodies of work examining broader ideas of sustainable tourism, as well as more nuanced insights into global tourism. If

you have any questions for the speakers, please communicate these questions via the chat tool in Zoom. And at the end of the speaking section of the webinar, we will try our best to have speakers respond to some of the questions raised.

Before we start, I would like to make a very brief introduction of today's speakers before handing over to them respectively. Our first speaker will be Professor Graham Miller. Graham is the Pro-Vice Chancellor and Executive Dean of Arts and Social... Faculty of Arts and Social Sciences, University of Surrey in the U.K. Following Professor Miller, we will have Rochelle Turner who is the Head of Research and Insight at MaCher based in the USA.

Thirdly, we have Professor Xavier Font, Professor of Sustainability Marketing at the University of Surrey also. And Xavier is also Co-Editor in Chief of one of the top ranking journals in tourism, the Journal of Sustainable Tourism. And finally we have Wakayama University's Professor Kumi Kato, Professor in the Faculty of Tourism and the Graduate School of Tourism who will be giving us the Japan perspective on this.

So without further ado, let's go to our first speaker. Our first speaker, as I mentioned earlier, is Professor Graham Miller. Graham holds a Chair in Sustainability in Business and is Pro-Vice Chancellor at the University of Surrey, and Executive Dean of the Faculty of Arts and Social Sciences. Graham is Chair of the University Strategic Sustainability Group with responsibility for providing sustainability in all its forms across the university. He is also Distinguished University Professor at Wakayama University. Graham's research is interested in the drivers to create a more sustainable tourism. He was Project Lead for the European Commission project on the enterprise and industries work to develop Indicators of Sustainability for Tourism Destinations across Europe. The results of this work has led to the creation of the European

Tourism Indicator System now employed by over 200 destinations across Europe. Graham is the former Co-Editor of the Journal of Sustainable Tourism.

As I said, one of the leading journals dedicated to research around promoting sustainability in tourism. Graham has also been the judge for the World Travel and Tourism Council's Tourism for Tomorrow Awards. And Graham is also a member of the World Economic Forum's Global Agenda Council for the Future of Travel and Tourism. So we are very privileged to have Professor Graham Miller speak with us tonight, and I will hand over to Graham now.

## Recovering sustainably, global lessons for Japan's tourism industry

### Graham Miller

Thank you, Joseph. Much appreciate it. That was a... an embarrassingly long introduction and bio. It's always awful hearing your own bio come back to yourself. I am very pleased to be associated with Wakayama University. It has been a long association now that I have had with them, and then even longer association with Japan. I first came to Japan when I was 20 years old and lived in the country for a number of years, so always very pleased to apply my thinking and to see what the implications of that are for Japan. We have a wonderful panel this evening. We have got... I am very pleased to be able to help to curate this panel. I know that they have got some fantastic data that they are going to present.

So I am going to start with a broader context of some ideas. Before we get into the more empirical evidence that Xavier and Rochelle and Kumi will present about what's actually happening but I am going to start with a few ideas. Just about the this

notion of... we talked about this now being a time for change, you know, and COVID has led for... lead us to this opportunity for change. And I just want to interrogate that idea a little bit and think about well, why is this a moment of change? Why do we think that now is a moment of change? And indeed, actually, is there any substance to that or is that just wishful thinking on our part? So I think in any process of social change, and there is a million models of social change, that we can draw on but we have to start with identifying a problem. We have to see that there is a problem there in order for it to be able to change. And last year at the University of Surrey, we had Johan Rockström who is the Chair of the Stockholm Resilience Center in Sweden. They have given birth to the idea of planetary boundaries which I find is a very convincing one, a very important way of thinking about boundaries that we live within as a society.

Professor Rockström was talking about how if we are looking at social policy change, then that's a 25-year process from when we identify a problem through to when we see the beginnings of change. Now, I wrote my PhD, published my PhD in... on Sustainable Tourism published that in the year 2000. So I am coming up on 20 years, 25 years of pushing at this. What it means, I think, is that as academics, we are almost doomed to be frustrated for almost all of our careers. On pushing for change, we have identified change. We want to see change. We are trying to convince the rest of the world to change but the role in the process we play is that we are at the very beginning of that process. And so I think we are almost doomed to be inevitably frustrated and that perhaps does lead to a certain sense of cynicism that... what is that, is anything really going to change this time. We have seen this for 20 years, 10 years, 15 years, 25 years, and nothing has changed. So I think there is inevitably a cynicism is, is this really the moment when things are going to change?

I think what we are seeing now though is people seeing... people who are not academics, who just get on with their normal lives just like to be left alone, seeing evidence of the effect of a change in life, changing life has been imposed upon them. And so we are seeing the effects of that now on our own personal lives rather than professional lives and those are for the good and the bad. And so we see environmental benefits, more nature. Certainly where I live, if I go out, I see nature more obvious, it's obvious as humans have retreated; nature has stepped forward to fill some of that space. We are monitoring the impacts on air pollution, on carbon production. So we see some of those positive environmental impacts, and we come to appreciate those. There are clearly social benefits that we are experiencing more time with our families, eating better, more time for exercise, less time in commuting, less congestion, some of those impacts. And so we are experiencing these and living these and, therefore, inevitably, reflecting on these.



We are also though seeing some of the negative impacts of this imposed change of life, and those are typically an economic impact. So we are seeing the loss of jobs. We are seeing an increase in stress. We are seeing financial pressures. We are seeing and feeling I guess the importance of jobs and employment and social interaction, on our social identities, and what it means to us to work in a certain position in a certain organizations. So we are having to experience what a smaller economy looks like now.

Professor Tim Jackson at the University of Surrey very esteemed professor who talks about prosperity without growth, the idea that we can exist with a smaller economy, and we can be prosperous as people and as societies. And there is, of course, a school of thought that says, well, look, we can grow again. But we can grow again in more sustainable ways. And the Green New Deal proposals that have been put forward in Canada and by the Democrats in the U.S. and by various countries across Europe talk to this idea that we can be bigger, but bigger in a different way. And so we can have a bigger economy. But we are experiencing the good and the bad, I think, of social change at the moment. And that now I think is important because destinations bring it to tourism destinations. And we use the same examples always of Amsterdam and Barcelona and Kyoto in Japan, who are calling for less tourism. Of course, they are not calling for the degree to which we have got less tourism at the moment but now we are actually to be able to experience more of what less tourism looks like. And we can think about well do we...now we understand what the impact of that will be on all aspects of society not just on the environment and the social.

So in any process of change, we need to see positive examples to follow as I think we are seeing some of those positive examples now. We are seeing certainly values based businesses coming more to the floor. There is though inevitably a path dependency to the way that we structure life. People who have invested in big infrastructure, airports and cruise ships, those have the potential to be stranded assets, and anybody who owns stranded assets will fight very hard to defend and to protect those. And so, they will always weigh and fight against a desire to change. I know Rochelle is going to talk about some of the changes in consumer attitudes and consumer values we will see, so I am not going to,

really going to dwell on those.

But just in terms of, if we start to see a shift in people towards more rural lives, more rural holidays, of city holidays, of a less crowded, of a more crowded, for natural of a manmade, those are the kind of holidays that large corporates, owners of large infrastructure can't follow with easily. So there is the potential for there being less business pressure on local governance on local governments, and local governance and hence less political or the political power that's driven by a democratic process can represent people more rather than representing business side. I think this does give a chance to recreate tourism in a different way. I think, therefore, that what we are seeing at the moment is people reflecting on and not only a recognition of the need to change, but an experience of a changed life imposed upon them. And the opportunity, therefore, for consumer sovereignty, for local governance to be stronger in a reformed world which provides the opportunity for recreated tourism. So I will stop there with those thoughts. I am very happy to follow up on those with questions afterwards but with that, I will hand back to you, Joseph.

### **Cheer:**

Thank you, Graham. Thank you for constructing that thoughtful framework that sets up the rest of the webinar nicely. And thank you also to Graham for inviting all of the speakers this evening as well. Thanks very much.

Okay. It often takes a very brave practitioner to join academics at things like this. And our next speaker is a practitioner of the highest order. Rochelle Turner is the Head of Research and Insight at MaCher, a sustainable design firm, a B Corp and a signatory and participant in the United Nations Global Compact. In her role, Rochelle uses business and academic insights to understand motivations in dynamics of people and organizations, and applies research to help solve

clients' business and or marketing challenges. Rochelle has spent her whole career conducting consumer, economic, marketing and policy research largely within the tourism sector. She has held a number of senior roles and most recently as Vice President Research and Sustainability at the World Travel and Tourism Council. So we are very privileged to have you join us this evening, Rochelle. Please welcome Rochelle Turner, and I will hand it over to you, Rochelle.

## **Consumer Trends Post COVID-19**

### **Rochelle Turner**

Thank you, Joseph. And as you say, yes, I am the lone non-academic. So forgive me if I don't go deep into all the theory. I wanted to talk to people today about post-COVID consumer trends. I think, I have to caveat that with this graph here. I can't and I don't think any of us really can start talking about a post-COVID world. While the numbers of cases look like this, we are certainly not in a place yet where we have got to a stage where we can say we are in a new normal, that the issues around COVID have subsided and that we are moving forward. And what we are seeing, of course, is many new outbreaks, unfortunately, and many countries that are still having rising cases on a daily basis. It's a situation that is very much ongoing.

What we see though, is that COVID, has been a real accelerator of consumer trends. There are a number of global macro trends, I have pulled out a few of them here around population demographics, and where the populations are growing, but also what ages are growing. And we know that in a few years' time, for example, the population of Nigeria is going to overtake the size of population in the U.S., for example. We have

an incredibly fragile planet, none more evident than in this COVID period, extreme growing inequalities, geopolitical tensions, and, of course, the rise in data and connectivity which has been an extreme help in many people struggling with lockdowns in the COVID world.

We have a real fear of contagion which is something that people are extraordinarily concerned about. They have seen the death rate in the cities and the countries that they are living in many, many times more than what those death rates would be in normal circumstances. New spikes are occurring and people are weary of others and weary of what this disease potentially could do to them or their families. We have tremendous financial uncertainty that Graham talked about a lot but companies almost on a daily basis are announcing job cuts. Lufthansa, for example, one of the big airlines announcing 22,000 jobs to be lost, BP, the Petroleum Company is to cut 10,000 jobs, but also on a retail level as well jobs are being cut as people are not heading out to the shops anymore.

Seeing this incredible inequity of impact people of color, poor people, older people being far more affected by the disease on the one hand. We see women who are stuck at home and bearing the brunt of a lot of childcare in many cases. And also young people who look at their future and wonder how are they going to get a job, the universities that they are attending or not the experience that students just a year before them would have had, and so these issues are affecting people in different ways.

Anxiety has also increased due to our loss of control and freedoms. We don't know what to do. We don't know who we can trust. We turn away and people...from my own experience, people jump into the bushes if I am out for a run. Do you wear a mask? Do you not wear a mask? Can I talk to that person? Can I not talk to that person?

And it's causing this tremendous anxiety. We have had this lockdown which forces changes of habits. We look at our daily patterns of behavior and according to the academics ([https://www.researchgate.net/publication/252798940\\_Habits-A\\_Repeat\\_Performance](https://www.researchgate.net/publication/252798940_Habits-A_Repeat_Performance)) in the pre-lockdown world about 45% of behavior is repeated day-in day-out. And in lockdown, and where we have been having to do the same thing more and more, I would imagine that that's going to be far greater than that 45%.

Further, academics (<https://onlinelibrary.wiley.com/doi/full/10.1002/ejsp.674>) have looked at how long a change takes to create a habit. It takes on average about 66 days for a habit to really bed in and change. And so a lot of the habits will have changed as people have been forced to do things differently and do different things.

And so we have seen this acceleration of long term consumer trends. None of them is discrete; they all overlap in some way and they all have been developing for some time. And I will go into each of them in a slight bit of detail in a minute but just to highlight what they are.

Considered consumption is all about living with less and a glorification of frugality as we come to terms with the fact we have less. And we are renting and borrowing and sharing far more than we did before.

Fairness, authenticity and transparency: companies now are known as glass boxes (<https://medium.com/trendwatching-pulse/your-brand-was-a-black-box-now-its-a-glass-box-6e64269ce458>), that there is nowhere for companies to hide because of social media. It's either your employees on the inside, your customers or people that just see your business on a day-to-day basis that are looking at what your businesses are doing, looking at what your organizations are doing and at times, saying



“actually I don't think what you are doing is fair”.

Community and compassion: we have seen a lot of this. We have seen a lot of localism. We have seen a lot of kindness. We have seen a lot of people sharing and building communities in a way that they didn't before. And this is something that I think is only going to grow.

Finally, preparation and resilience - treating resilience almost as a value in our daily lives and saying that we we have to be prepared, we have to be prepared financially. We have to be prepared digitally. We have to be prepared with skills. Our mental wellness needs to be prepared. Our finances need to be prepared, and we need to move ahead in this world of not taking things for granted.

So just to going to each of these trends in a slight bit of detail:

Considered consumption. Here you can see some data from a 15-market survey that came out from Accenture. And you can see around the world, how people say that they are really committing to or have been committing to more sustainable practices in the things that they have been buying and the things that they have been doing. Less food waste is an example. A lot of this is because they have had too, people have had to cook more and eat out less. And they recognize how much food that they are throwing away and the cost perhaps of that food for those that are struggling financially. So we are seeing more cost-conscious shopping, and shopping locally, as well. We have also seen people actually buying less things. We are moving as consumers away from things and into experiences. And the experience economy is something that is growing and is something that actually brings greater happiness and joy than a products.

People want to travel sustainably. We see the growing interest in sustainable travel and

local travel. But we also see around the world, people saying that companies should stand for something other than making money, and they are consciously choosing companies that are doing those things.

And that brings me into this fairness, honesty and authenticity. This comes in particularly around the authenticity element. People wanting more than just words. They want to know what brands and companies are doing and specific actions they are taking. Here is an example from Patagonia, another B Corp. Patagonia wanted to make a stand around the fact that the U.S. Government was essentially taking land away from the American people. And it sued the government put out very hard hitting advertisements like this. And it hasn't hurt Patagonia. The Patagonia brand is stronger than ever, because it is taking a stand and it is coming up behind that stand with actual action. 64% of people around the world say that they are willing to buy or boycott a brand due to its position on a social or ethical issue, according to Edelman, which is a big public relations company that an annual survey on trust. And these kinds of corporate behaviors are things that people are really looking more for in the companies that they are buying from.

We are also seeing supporting local and purposeful businesses as being incredibly important. Now again, some of that is forced upon us because we are not able to travel as borders are closed. But people don't necessarily want to travel internationally at the moment. And you are seeing that a permanent change in the dark blue, people saying that they are willing to take holidays closer to home. But I think also interesting and moving into compassion and empathy, is people saying that they want to pay attention now to how companies treat people. And so a couple of examples in tourism that have really come out to me: Kind Traveler is an American company,

and it gives \$10 per night to the local community for every night you stay or you book. It's a socially conscious give and get hotel booking and media platform. And so it gives the travelers the opportunity to choose the charities in the local communities where they are staying. So if you are staying in a hotel in, say, Venice, California, then the charities that you would be offering your \$10 a night to would be in Venice, California and so to really offer that support in the destinations.

Another example here around supporting local is this app and website "Spotted by locals". This taps into travellers who want an experience of not wanting to do what tourists are doing, but wanting to do what the local people are doing. And, of course, there is a huge movement by those that are saying no, no, no, don't put us on the app, because we don't want tourists to know about our places. But, of course, that's a whole other issue.

We have seen a lot of kindness over the COVID period. Clapping for careers and sharing seeds and growing vegetables and shopping for our neighbors and building those communities are things that are expected to continue. People also saying that they want to share and buy more products locally, around the world, nearly 7 in 10 people are saying that they want to buy more local products as COVID ends.

Now building resilience comes in a number of forms. Three areas are financial, digital and wellness. You can see some examples here. From a digital perspective as an indicator albeit not necessarily one that we would want to herald as the way forward - But Amazon has increased sales 40% in Q2 year-on-year. We don't want to give our money to Jeff Bezos but we need to capitalize on this trend of having a digital presence. And companies now must have a strong digital presence if they want to survive for the future.

For working from home; 46% of people who never worked from home now plan to work from home in the future. Now, of course, you can only work from home if you have the kind of job which allows you to which in many cases is a white-collar job. And so again it creates a disparity between the white-collar and the blue-collar jobs and who is and is not able to work from home.



We are also seeing this increase in the savings rate, data for the US shows that it was 19% in June, but it reached 32% in April this year. And in the U.S., which had always had savings rates of about 6% or 7%, more people have been able to save during the COVID period. Going back to a world where we went and just bought what we wanted or shopped whenever we want is unlikely to continue in the way that it did before. But keeping up the savings and building this resilience for the future is something to do.

From a wellness perspective, there is a great saying (<https://www.weforum.org/press/2020/07/klaus-schwab-and-thierry-malleret-release-covid-19-the-great-reset-the-first-policy-book-on-the-covid-crisis-globally/>) that "we can't be individually well in a world that is unwell". And that refers to both mental wellness, but also for our environment, biodiversity and climate change that's affecting our world. According to the World Health Organization, around 350 million people are suffering from depression. And they think that in the next few years, depression is going to overtake heart disease as the world's

biggest disease that people carry with them throughout their lives. But we also see the sense of recognition that our world can't continue the way it was before. The recognition that COVID may either have come from our lack of care for the climate or the impact has been exacerbated by the lack of care for the climate. In the long term on a global survey, 71% of people say that climate change is a serious issue with COVID.

I will leave with this final slide, which is a picture that was taken in Hong Kong, which reads that we can't return to normal because the normal that we had was precisely the problem. And I think that's right, I think we going back to wherever we end up and say we are certainly not there yet. But it has to be a different world and people are waking up to that different world and companies and tourism needs to be aware of where people are going and what they are thinking, so that they can be ready to capture the experiences that they want, when the time is right to do so. Thank you very much and look forward to the next presentation.

**Cheer:**

Thank you, Rochelle, thank you for that really, really fascinating and insightful account of consumer trends. And that last statement you made, 'we cannot be individually well in a world that is unwell' highlights the interconnectivity between humans and non-humans and nature as well. So thank you very much for that. But don't go away. Our next speaker is Professor Xavier Font, one of the leading tourism researchers around the globe. Xavier is Professor of Sustainability Marketing at the University of Surrey, and also Professor at the University of the Arctic in Norway. He researches and develops methods of sustainable tourism production and consumption, and he is Co-Editor of the leading journal, the Journal of Sustainable Tourism. Xavier has published widely about sustainable tourism certification, and has consulted on sustainable product development, marketing

and communication for several U.N. agencies.

He has also worked with the International Finance Corporation, European Commission, VisitEngland, Fáilte Ireland, VisitWales, VisitScotland and WWF amongst others. He has conducted over 160 courses for more than 3000 businesses on how to market and communicate sustainability. Importantly, during 2020 Xavier has been principal investigator for a European Commission report on Sustainable Tourism Measurement Systems. He is currently Principal Investigator of an INTEREG €23.5 million project on how to reduce winter seasonality in the U.K. and France by supporting the development of experiential, sustainable tourism that improves the economy, contributes to healthy communities and preserves the environment. Without further ado, I hand over to you Xavier.

## **Changes in air passenger demand as a result of the COVID-19 crisis**

**Xavier Font**

Thank you, Joseph. You have just reminded me that next time I need to send a shorter bio, because that is way too much in there. Can you all see my screen? Okay.

I will assume you can see my screen. Okay, that's great. Thank you very much. So I was asked to provide some data to as a background around consumer confidence when it comes to flying, looking ahead for the next few months. And some of this data complements the material that Rochelle was just showing but in my case, very much in one very specific sector.

Typically, tourist destinations have used past data to be able to take decisions. We do surveys every year to find out how tourism the previous year was satisfied and how much they

travelled. And I think that we have now learned that traditional tourism statistics are no longer fit for purpose, to take decisions in very volatile situations like the ones that we have got now. So we have got a number of questions that we need to be asking ourselves, and I think that big data is able to help us answer some of those questions, such as what is the impact of COVID-19 in my destination? How will my destination develop? What will be the evolution? And how will I do compared to my competitors? When will different tourist markets reactivate or what will defend that markets will do and which ones will reactivate first? And what we found is that we can capture data on three sets of information. We can capture data on what is the desire to travel? How much do people want to travel? And to do this, we can look for data on how people are searching online for flights. We can look at data and what is their intention to travel.

So when we go online and we will look at possible flights and we are searching on Google, which of those flights then when we have a whole list, which are the ones that we click on to actually be able to analyze more in detail and see what are the options for us for that particular flight. And then, of course, we could have data on the actual purchase decision to travel. Now the data on purchase decision to travel is unlikely that we will be able to find it but at least not in immediate time and not necessarily looking ahead of us. But we have got tools like, for example, Skyscanner is able to provide us data on desire and intention to travel. And this is what I have been doing over the last few months.

So Skyscanner gave us data. Essentially, we pay for these data on 500 million flight searches across the world, 500 million flight searches is a lot of data. So luckily I work with a statistician who loves big data and was able to pull some of these data for us in here. This is the searches and the purchases we have had for flights up to

30th of June 2020. We are updating this data on a regular basis. So this is how people have been searching for flights. And this is linked to their... they actually intention to purchase those flights, okay. So say we don't have a specific date and how much they have actually purchased but what this tells us is in this case in this graph for the Middle East, Northeast Asia, Southeast Asia, and South Asia, how, before COVID, the actual intentions to fly were between 20, you know, about 10% to 20%, above what we had been in the previous year, okay.

What we clearly see here is very quickly from February onwards, that the intention to fly drops quite massively first in North Asia, then in other parts of Asia and the Middle East, and then the drop is continuous. And from June onwards, what the data essentially showing us is year-on-year, how much are people searching to fly compared to the previous year, okay. So what we can see is there is a drop of more than 70% or about 70% for pretty much every market. This is not an actual flight, when, of course, that the number of people have been dropped, they have reduced the number of flights is more than that. This is...our people actually going online and looking for flights with a desire to be able to fly soon and actually clicking on some of those flights to get more specific details.

You can see there is a slight increase in desire to fly by the end of the year by November, December, okay, particularly around Middle East more than in Northeast Asia. When we then look at some of this data, we compare over periods of time, we can see that the data we collected in April is different to the data we have then collected just two months later in June. You can see that the searches and the picks, searches are always higher. This is just somebody going online and seeing are there any flights to go from Japan to Europe, I wonder how much the cost. It takes or the actual clicks on one specific fly to then

get more specific details on that flight. And you can see that at the beginning of the year, number of people searching for flight was much, much higher than a year earlier whereas the number of picks wasn't so much, okay, that's because people are interested in flying is always higher than the actual choice of flights.



But then what you can really see the difference is from March on what is when the data really varies. And we can see that as the months pass our consumer confidence for the ability of our sector to recover. And our perception of risk around flying essentially is getting worse and worse, okay. So we can see that, you know, the data is changing on a month-by-month basis. Now destinations in general are developing for the worse.

We can also see what is our situation compared to competitors. And you can see in which parts of the world, there is a perception that things will get better in the next few months, for example, in Europe, you can see the Northern Europe, and that there is a perception by those markets, the situation will get better faster. What is the perceptions in Asia and as good as they are in other parts of the world. So if you were to looking at well, which of the markets are most likely to help me recover or which will be the countries where we should be spending money trying to target those particular targeted groups. Because those customers are more predisposed to believe that the situation will improve. You can use some of these data to be able to identify specific

markets, and you can see them some of the markets the situation is not so. So you can see, for example, in here that the market is for Northeast Asia, for regional travel as well as domestic travel is going to be depressed for longer than the markets from other parts of the world.

So when we collected this data, we then looked at well, how do we help specifically governments to be able to use data from Skyscanner to create some dashboards that will help them then make all the decisions. Now, I don't have this particular data for Japan. I can show you here the data we collected for Spain. And what we found here was we basically looked at, which will be the markets that are going to reactivate fastest for inbound tourism into Spain. And so any market where the desire or the intention to fly was worse than 30% compared to the previous year. We use a traffic light system and we marked them in red. The markets have dropped between 0% and 30%. We have marked them in amber, and the market who actually had been an improvement from the previous year, we marked them in green. And so we could see in here is what data we collected in April 2020. And we could see that for the summer season every market across the world was going to have a drop of at least 30% compared to the previous year.

But we could see that for some markets there was a desire to come back for the October to December a sector. And so for example, when we were advising the Spanish tourist spot, for some of the regional tourist sports, we are saying to them, look, spending the money and trying to target the U.K. and the Irish and to certain extent the German market. And don't spend your money trying to target some of the markets, because some of those markets are more predisposed to believe that they will be able to fly when it comes to that time of year. We keep doing these data analysis month-by-month and with some of the tourist sports we providing advice on a month-by-

month basis to see how consumer confidence from those countries is changing, to then be able to have much more targeted marketing campaigns.

Effectively, we have got this data not only on a market-by-market basis, but we can have it on an airport-by-airport basis. And what we can see there is from which airports anywhere in the world is the amount of fly increasing or decreasing on real time data, okay. And linked to this, we can then tailor this to specific online marketing campaigns to focus on particular markets that who want to fly to specific routes to then be able to have our best opportunities from the yield management view to maximize the return on investment on any marketing budget spent by those tourist sports. And link to these we can see which market will reactivate first not only when they will reactivate, but which other specific markets that we can get most an activity from.

And we can see there for some advantages in using big data to the destination decisions like this, we can see advantages that we can use real time data, past data that's been collected through customer questionnaires isn't going to tell us very much. We can see a huge amount of granularity both from a temporal as well as a territorial point-of-view I say if you can find out from which airport and to which airports. This is huge. What we for example, seeing is that tourists are more likely to be willing to buy flights with specific airlines and not others that avoiding low cost airlines and particularly in Europe, airlines like Ryanair, that avoiding large airports and consumers are favoring smaller airports, they are favoring point-to-point flying as opposed to flying that requires connections, and the market and most likely to recover are destinations with flights less than two hours from your home country, okay.

Maybe we have seen a recovery of domestic travel, and travel by car and travel that does not

require pre-booking and compared to travel that requires any form of booking. So I am using here data around flights in particular. And the advantage...the final advantage here is that we can forecast based on real data. So we can have very flexible decision. So we can take as tourist sport based on this data. All of this advantage, if you think about it could really not turn into challenges as well. And we need data scientists that are very good at understanding data.

And what we have seen is tourist sports are not particularly equipped to use big data, and they are still trying to use big data in the same way that they used, you know, traditional paper based questionnaires. This is a little bit like using your iPhone, just like you used a normal landline based phone 30, 40 years ago, you know, it seems like you missed opportunity to not being able to use all the additional features that big data allows you to use. So even one we have good data scientists employed in tourist sports to then be able to maximize the benefits of big data. We can then, you know, use data from the user oriented thinking, and we can use it to compliment and in some cases replace official statistical agencies are now kind of behind the times in some data. If you find this information of interest and you want to know more about the market demand for flights. We have a journal article that has been published on this topic, and you can get more details there on what's happening in different parts of the world. Thank you very much.

**Cheer:**

Thank you very much Xavier for that very important perspective on data and what data can tell us and how important it is in decision making - we will be able to get back to you with some questions later on. Xavier, thanks very much for that. Please thank, Professor Xavier Font.

Our next speaker is much closer to home at Wakayama Professor Kumi Kato, Professor Kumi

Kato is Professor at the Faculty of Tourism and the Graduate School of Tourism in Wakayama University. She is also specially appointed Professor at Musashino University and has a visiting professorship at the Asian Institute of Tourism, the University of the Philippines. Kumi has also acted in advisory roles for organizations including the Sustainable Tourism Promotion Center APTEC in Japan, Osaka University and Global Himalayan Expeditions India. Kumi currently teaches sustainability and tourism with particular focus on community, identity, empowerment and resilience and has also taught in Australia for over 24 years.

Kumi is currently leading a national project, the Japan Sustainable Tourism Standard for Destinations GSTC based standard developed during 2019 and was implemented nationally during 2020. Kumi serve as a site auditor for the World Travel and Tourism Councils Tourism for Tomorrow Award. And Kumi is a passionate advocate for sustainability in community development, education, and research, working with a wide range of stakeholders and initiating practical and often creative projects. That said, I will hand over to you, Professor Kato.

## Development of Japan Sustainable Tourism Standard for Destinations (JSTS-D)

### Kumi Kato

Thank you very much, Joseph. Sorry about the long bio. This is screenshare, is that all right, is that shared properly? Okay, thank you so much for this invitation and thank you, everyone, for being here tonight. I am really sorry, I can't invite you all to Japan but so nice to have you all there. So today, as for Joseph's introduction, my role is to talk a little bit about the Japan's national initiatives in developing a Sustainable Tourism

Standard. It was just launched a month ago, at the end of June. It is a GSTC based national guidelines. So today, I am really talking on behalf of the entire team, including some of our students and also the coordinating section, the office for inbound experience at Japan Tourism Agency, JTA or Kankō-chō as the Central Government Tourism Agency.



So the common expectation might be that we are going to come up with some quick solutions for this situation globally, we are experiencing but there are projects such as go-to-campaigns that the government initiated but I do believe that this is an opportunity for long term shift, a long term thinking shift. I just like to introduce that the Japan's initiative in the last few years which I think it's a very important beginning. So the slideshow - as many of you that Japan has experienced a massive growth in particularly inbound tourism in the last decade, particularly in the last few years.

Then there was a very big expectation because that we have a series of mega sporting events such as the Rugby World Cup last year, and also Tokyo 2020 which is now Tokyo 2021. So inbound tourism exceeded outbound in the last few years, and then there was a big expectation to further growth. And that was the before Corona or BC era but as many other major cities in the world. So Japan started to feel, in some of the major cities, the stress, so the government initiated this tourism Sustainable Tourism Promotion Office established 2019.

So in that we had a national survey, and then it was decided that we actually going to implement GSTC Destination Criteria as a national guideline. So as many of you very aware that GSTC consists of four areas and 38 standards. So it was a very quick kind of project, because we had to do this in nearly six months. So, but JTA became GSTC member, and some of the activities has been publicized on their website, which was really a great opportunity for Japan to actually promote the initiatives internationally. I don't have time to go into the detail of the standard, which are all available on online.

As part of that development project, we actually use the GSTC to actually conduct a national survey. So we actually turned all the GSTC Destination Criteria as a questionnaire and then send it to 1740 municipalities in Japan. So it was only a one month project, but we actually received about 620 response...630 response in the end. we don't have time to go into all these details, but we are actually now analyzing this data by criteria, but also by this nation type and by regions as well. I don't...really don't have time to go into that detail, but then I think it is really provided a very great common platform or the language to actually talk about sustainability, specifically to tourism, because a lot of the local government answered that, yes, they do have a lot of the... like, they have plans. They have policies. They have risk management plans. They have policies on...like environmental conservation, but not really specifically to tourism. So this was a great exercise that we can now talk more specifically about tourism.

In this COVID situation, opportunities in Japan, I think Graham talked about rural development focus. I think that was probably would create a different kind of opportunities for local areas or regional areas in Japan, which really was the very reason that the Japan's tourism

was brought into the National Transport Policy and Strategy. This probably not specific to Japan, but very much relates to the work style change. I think now we have the words in Japanese like remote, work vacation, co-working space, and so all these languages coming into our daily life style.

So I think that would be a significant changes in that work situation, which would have implication for tourism. And also, I think this is a great opportunity for Japan, for internationalization that setting the sustainability standard, nationally. So I hope this would be opportunity for Japan's tourism to become more people focused, as Graham said, and less political. And also I really like what Rochelle said more kind tourism. Thank you.

## <Part II > Panel Discussion

### **Cheer:**

Thank you very much, Kumi. Thank you for your insights on that. Okay, everyone - in the interest of time, we will get straight to questions. Thank you to all of those who submitted questions either through the chat or through one of us here. The four panelists won't be able to stick around for any longer than, say the next 15 minutes or so. So we will get straight into it. In terms of questions, the first question and I will paraphrase this question comes from Kanamori Akashi from JNTO, the Japanese National Tourist Office. And his question is about the relevance of the SDGs in the so called New Normal, and I wonder if any of our panelists can talk about that? How relevant are the SDGs insofar as tourism in the new normal is concerned? Anyone?

### **Miller:**

I will have a go to start with then Joseph. I



mean...I think they have to be...people will understand the SDGs are about how we live our life currently? So they are very relevant to the future, I think the issues remain the same. What I think will change or what I hope will change is the answers we come to in assessing those...the different elements of the SDGs. Now, the SDGs, are incompatible. There is a lot of compatibility in there, we want to have a wealthier economy, but we want to produce less waste and less pollution, etc, etc. So the...it is in implicit and increasingly explicit in the SDGs, how we balance all those things. So I think the SDGs will remain very important for the future, what I think will probably changes is our assessment of where that balance comes in evaluating the trade-offs.

**Cheer:**

Okay. Thank you, Graham. Anyone else, Rochelle, would you like to add to what Graham has said?

**Turner:**

I think the business world has really embraced the SDGs. And you mentioned earlier, when you were introducing me, as a B Corp, the B Corp Community has linked up with the UN and created a B Corp Sustainability Action Manager. We systematically go through the Sustainable Development Goals and our business and our business plans to identify how and where we need to be taking action and where we are weak and where we might have opportunities for further growth. Yes, there is that question around more waste. But I also think there is a huge movement towards more circularity. We are seeing that in a lot of products and a lot of innovation that's happening there. There is a lot of investment and money that's required, but I think there is movement, certainly in aligning SDGs with business goals.

**Cheer:**

Okay. Kumi, please go ahead. You need to

unmute.

**Kato:**

Sorry. Yeah, thank you. One of the reason that we actually selected to use GSTC, as a national guideline was because it's actually connected to SDGs. So each, like 38 standards actually identified, which actually, you know, which SDGs they would actually address to. So a lot of the local governments now have like, SDG section or SDG strategy sections. So that works across that department across that different department, which actually is the great advantage, because all these...like a Sustainable Tourism Standard Implementation, we can obviously, the only in the tourism sector section can't do it themselves. So but then with the SDGs, I think it can be implemented across the board. So I think that has advantage for that the tourism sector as well. So I think it's very important. Sorry, that's it.

**Cheer:**

Thank you. Thank you very much, Kumi. The next question comes from Europe, I think, from your Januschka Schmidt, I think, is in Europe. What kind of change can we observe in a way tourism destinations are marketed? She asked, is there a shift towards more security or does market react in a different way to COVID-19? And it's related to another question talking about the shift from sun, sand and sea to sun, sand, sea sanitation and safety. How does all of this affect destination marketing? Xavier, would you want to jump in?

**Font:**

Actually marketing this, it's not an easy question because to be honest, I think what we have seen is that many of these destinations have responded with more of the same. I think large institutions are not particularly good at adapting, and my feeling is large companies have been flexible, and they have adapted because they have needed to but because also they have got the knowledge and systems to respond to change. But

I don't think that's a strength of the public sector or maybe this is my very European centric vision. We have been very slow at acknowledging we have got problems and finding solutions, we kind of hoped that the problems would go away. And so as a result, we are in situation with very low consumer confidence. And what I have seen from tourist destinations has been, let's just promote the people should come back and complain when another government says that an airport bridge between my country and your country is going to be closed down. So I am afraid it doesn't have an awful lot of kind of confidence in what governments are doing to promote tourism? Rochelle, maybe hopefully, you have got a more optimistic view.



**Turner:**

I don't know that the wider picture but I have seen a number of really interesting examples of how certain destination organizations in, particularly in the U.S. have adapted during COVID. Traditionally, they almost ignored their local markets, and everyone of any value to these organizations, these marketing organizations, came from the outside world. In the COVID world, this switched. In Florida but also peppered throughout the U.S. the DMOs recognized that if they wanted the businesses to survive, it was going to be the local people that would have to

support those local businesses. They started providing information for the local people, here are the shops that are open today, these are the hours that are open, here is where you can get your takeaways, this is where you can eat in. Here is where you can get this information, and here is a park that you can go to if you just want to get some fresh air and go outside... They started recognizing the value of local people. And I think if marketing organizations can start doing that, and then that is only a positive step forward.

**Cheer:**

Okay, thank you, Rochelle. Our next question comes from a colleague in India, Professor Venkat Rao at Pondicherry University in India. And I guess this might be directed to you Xavier. Since your presentation talks about passenger demand, what Professor Rao is asking is, to what extent will the aviation sector be able to respond quickly given the crisis?

**Font:**

Again, complex, because we have seen some good actions being taken, for example, at airports but then you know, that we tend to have like, the last mile, you know, challenges there. So we had, for example, some airports taking very good measures up to the moment when you get to the airport. But then, you know, the bus transfer, packing you in 50 people at the time inside the same bus and once you get on the airplane, then you are allowed to take your mask off. And the challenge has to be in some airlines and European, particularly Ryanair have been blamed for not following guidelines. So we have got challenges where individual companies not responding to the necessary guidelines or within the limit of what they can do, has then kind of damage that we have seen now, how the whole sector has been perceived.

**Miller:**

Right, this is what...Joseph. This is one of the

interesting elements of COVID where there is an opportunity to remake tourism. And you go back to 2008, after the financial crash, which was the last moment when we had big economic stimulus coming from government into industry to bail-out industry. You look in the U.S. into the car manufacturing industry in particular, there was a lot of conditionality applied to the money that went into that sector. And that's what gave a lot of emphasis to the push electric vehicles that we are seeing now. One of the things I think that's really disappointing about now is a lot of governments just putting money into sectors to bail them out to not recreate them. There is no conditionality being applied to it. It's just simply, let's keep it going in its current form for the future, and it would be wonderful to see the airline...the government saying to airlines, yes, we will keep you going.

We can't conceive of an economy in the future that doesn't have aviation, but you have to be investing in different models of business. You have to be investing in new technology, in new fuels. You have to be investing. You have to be accepting limits to emissions per year you have to be offsetting. And that conditionality should be coming now. And we are not seeing that which is a real missed opportunity. I think in...from governments to try to recreate tourism for the future. We have got a big lever now over industry and we are not pulling it.

**Cheer:**

Okay.

**Font:**

Yeah. And this applies even more to the cruise industry than to the airline industry.

**Miller:**

Absolutely.

**Turner:**

I think it did happen in France. I think the French government told Air France that it would help with their financing if they cut their domestic airline travel. So I think in certain countries. I think they have been taking steps, but you are absolutely right with the cruise lines.

**Cheer:**

Okay, just a couple more questions. But again, in the interest of time, everyone's trying to look into their crystal balls right now to try and describe what the post pandemic environment will look like. And I guess, Rochelle, you talked about the changes in consumer trends. And one of the questions that came through is, what aspects of tourism that will become used to in the pre-pandemic environment will no longer be around in the post-pandemic environment, for example, mass tourism.

**Turner:**

And I don't think mass tourism is always wrong, I think it can be managed, and it can be managed in a way that perhaps when people go to areas where they shouldn't be trekking can actually make more damage. The quote in my presentation - I was speaking to the author of that book yesterday. In his preparations for the book, he had called around many, many firms and many very large firms were talking about business travel, and their future projections. Many of the people he spoke to thought that there would be at least a 50% cut in their business travel.

So if there is a 50% cut in business travel, the business travelers tend to subsidize the economy flights for most legacy airlines, which means then that the prices of those flights will increase, which means then that those sort of "let's just hop over to X destination for the weekend" or "let's just go to on a stag do or hen do" or "girls weekend" or one of these "quick cheap and dirty weekends" will cost far more than it perhaps previously did. And so for those kinds of trips, people might start

to think again. If business travel is expecting a cut, we are expecting a cut clearly in events and conferences as well. So all of those trips, and then the subsequent leisure visits that you might do on the back of those, we are going to see far fewer less of them in for the time being I would think as well.



**Cheer:**

Okay, one question that came through about tourism careers. What does this all mean for tourism careers?

**Miller:**

Well, tourism is still fantastically interesting thing to study. And so if any tourism academics are concerned about their jobs, so I think it remains fantastically interesting thing to study into, through research or to study at university. There is something about travel, which is very human, isn't it? And I can't see of a future where we are not going to want to travel where our spirit of adventure and curiosity and humanity and wanting to spend time with people and interacting. And those things feel very human and therefore, I suspect more will remain. I think what form that takes absolutely is open for discussion. So will we see more regional based tourism? I think we will. Will we see more family based tourism, I think we will more travel to rural areas as opposed to cities, the kind of things that again

that Rochelle and Xavier and Kumi have talked about less crowded more natural less manmade those kind of things.

So I think we will see the form of tourism change. We may see it come down in scale. So we may not...it may not be back to those days where three, four, five holidays a year increasingly become the norm and the hypermobility that we have seen in the past the business travel, I for one would be very pleased if business travel receded a little bit that would make my life a lot. But I think the substance of tourism and that spirit of curiosity that we all love from when we travel, like, I just can't see that changing and going away really and being replaced with technology or being replaced with purchasing things or spending time, gardens or any of those other things but others may disagree.

**Cheer:**

Okay, any final remarks from anyone before we get to the final stage of tonight's webinar? Xavier, Kumi, Rochelle?

**Font:**

Yeah, I was just going to say, I wonder how many of the academics preparing the lectures to start this coming semester are fundamentally changing what they are going to teach or if we will still want to teach how things are used to be in the past. And it's our choice as academics, if we have a future, if we are going to teach how things used to be in the past, and we keep talking about we want to go back to the past. You are going to be the dinosaur, the guests stuck in the past.

**Cheer:**

Yeah. Okay.

**Kato:**

Like I read curriculum, a lot of our curriculum has field based studies and experience field works. And then I think that's something that we really

need to consider how are we going to do it? So that's going to be a big change in how we teach as well.

**Cheer:**

Okay. Thank you, Kumi. Okay. Before we officially close tonight's proceedings, I would like to express a very big thank you to Professor Graham Miller, Professor Xavier Font, Rochelle Turner, Professor Kumi Kato. Thank you very much for giving us your time and your perspectives this evening.

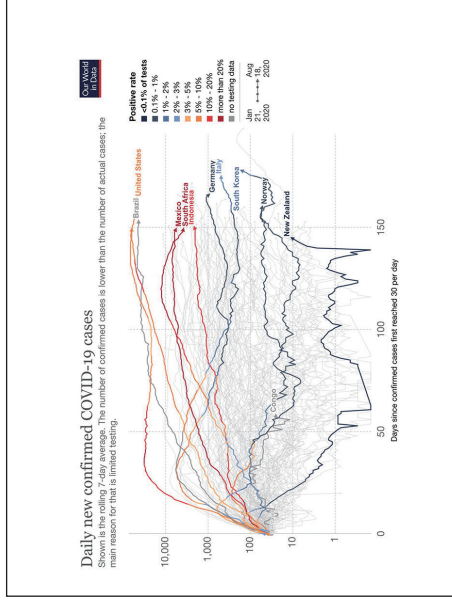
**MaCher**

# Consumer Trends Post COVID-19

What are the trends that will support a "new normal" for tourism businesses?

Rochelle Turner, head of Research and Insight

1



2

**MaCher**

**Acceleration of long-term consumer trends:**

- Considered consumption
- Fairness, authenticity & transparency
- Community and compassion
- Preparation & resilience

**Lockdown:** process change of habits

**COVID-19 specific issues:**

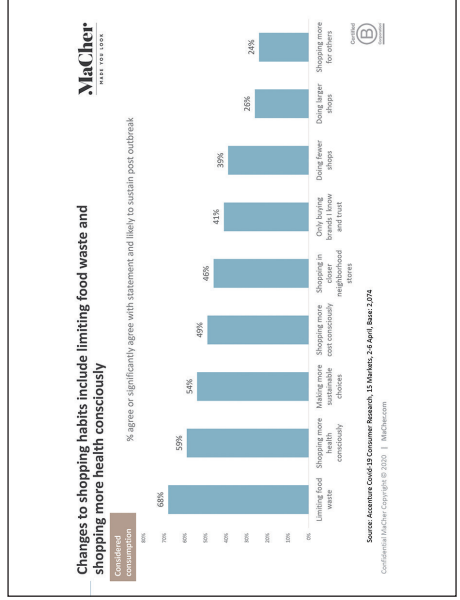
- Fear of contagion
- Financial uncertainty
- Inequity of impact
- Anxiety due to loss of freedoms

**Global macro trends:**

- Population demographics
- Fragile planet
- Growing inequalities
- Geopolitical tensions
- Data & connectivity

Source: Amnash, Vok, Unacademy

3



4

**MaCher**  
MARKETING COMMUNITY

**People expect companies to act, not just stand behind a cause**

*Fairness, honesty and authenticity*

*"People are past words, feelings, and statements. They want to know what companies are doing. They want specific, tangible, and sustained actions that make a difference."*

Marc Pritchard, P&G



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**MaCher**  
MARKETING COMMUNITY

**Supporting local and purposeful businesses**

*Community & compassion*

*How do you think consumers will change their [travel] behaviour as a result of the COVID-19 pandemic?*

Take more holidays  
Return to home  
Pay greater attention to local businesses

Short-term only  
Permanent  
No change  
Not sure

App and website that provides insider tips written by locals for cities

Kind Traveler is the first socially conscious Give+Get hotel booking and media platform that empowers users to positively impact the communities you visit.

**Spotted by Locals**  
Travel Tips

Source: Euromonitor International COVID-19 Wave of the Industry Survey, July 2020  
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**MaCher**  
MARKETING COMMUNITY

**Building resilience for the future**

*Preparation & Resilience*

**40%**  
Increase in Amazon Q2 net sales year-on-year

**46%**  
People who never worked from home previously now plan to work from home more often in the future (Accenture).

**19%**  
US savings rate in June 2020 (US BEA)

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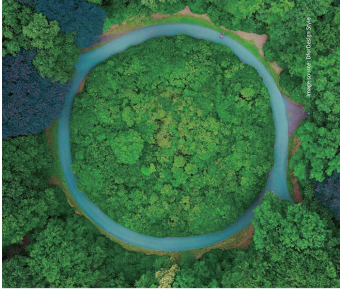
**MaCher**  
MARKETING COMMUNITY

**We cannot be individually well in a world that is unwell\***

*Preparation & Resilience*

**350 million**  
People around the world suffering from depression in 2017 (WHO)

**71%**  
Think that in the long term, climate change is as serious a crisis as Covid-19 is. (pos-MORI)



\*Nancy Schebb and Thierry Malletier  
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MARKETING LOCAL

— Thanks —

**Let's do something thoughtful  
together**

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Rechiele Turner, Head of Research and Insight  
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## CHANGES IN AIR PASSENGER DEMAND AS A RESULT OF THE COVID-19 CRISIS

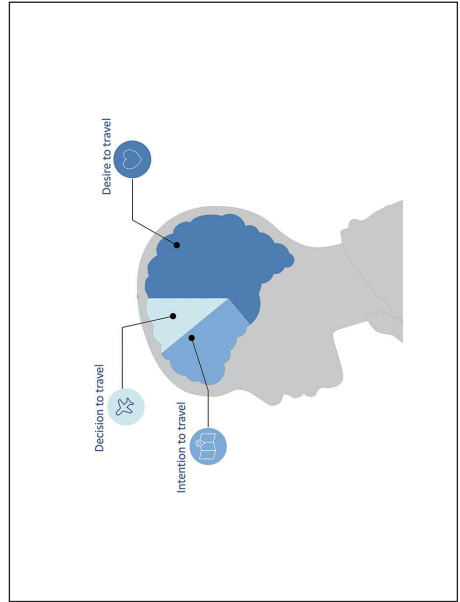
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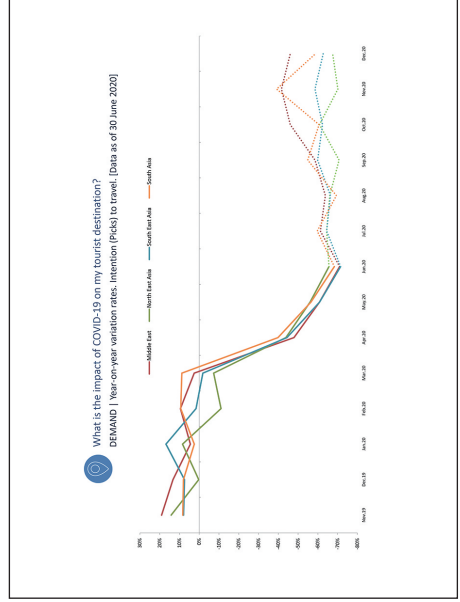
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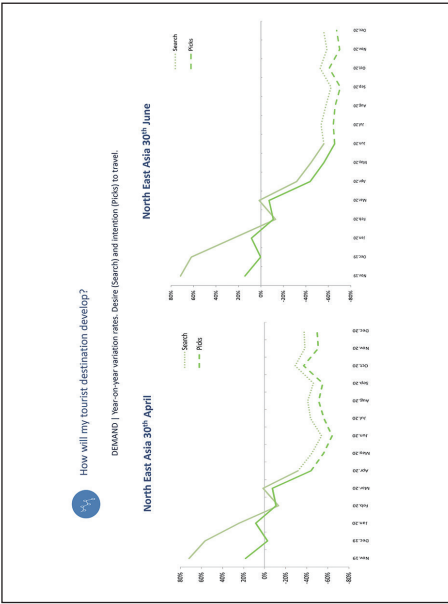
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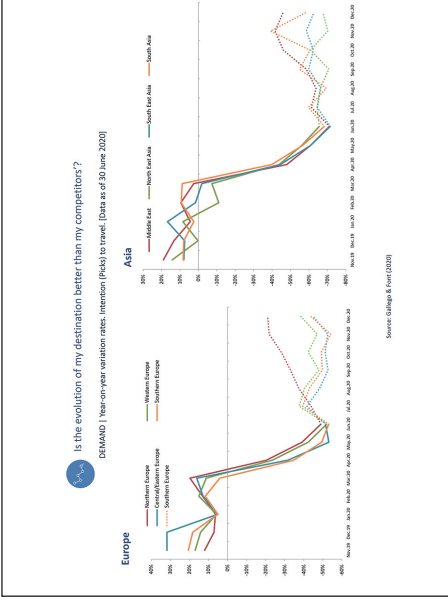
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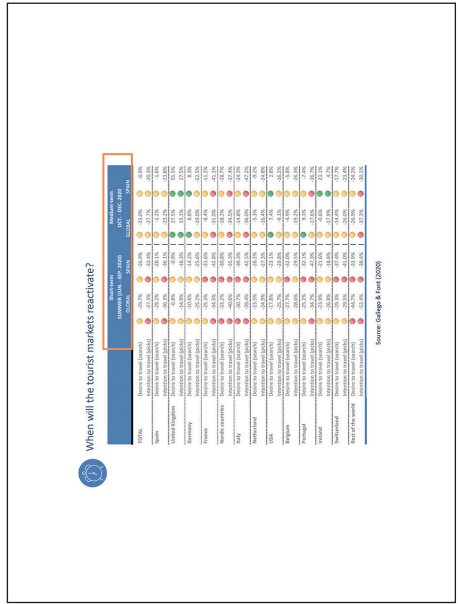
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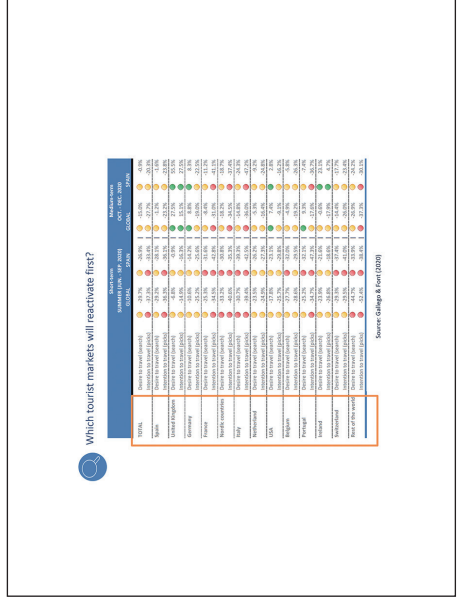
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## BIG DATA - DESTINATIONS

### ADVANTAGES

- 01 Data in real time
- 02 Temporal granularity
- 03 Territorial granularity
- 04 Forecasts: real data

### CHALLENGES

- 01 The market of Big Data sources is highly fragmented
- 02 User-oriented thinking
- 03 Involvement of official statistical agencies
- 04 Data scientists: to invest in data and staff training.

9

## RESEARCH



JOURNAL OF SUSTAINABLE TOURISM  
2020, Ahead-of-Print, 1-9  
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### Changes in air passenger demand as a result of the COVID-19 crisis: using Big Data to inform tourism policy


Inmaculada Gallego<sup>a</sup> and Xavier Font<sup>b,c</sup>

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**ABSTRACT** This study investigates the impact of mobility restrictions on the effects of the COVID-19 crisis, using SkyScanner data on air passenger searches (56,000 million and picks) (7,800 million) for flights between November 2019 and December 2020. Through Forecastways, for future travel during the COVID-19 crisis, we forecasted the number of air passengers in Europe and the Americas, and by about 59% in Asia, while expecting to travel the number of flight picks, the number of flight searches and the number of flight bookings. The results show that the number of flight searches and flight bookings about air travel during the last quarter of 2020, suggesting a U-shaped recovery. However, optimism has diminished in some passes, suggesting a flatter L-shape. A traffic light dashboard for domestic and inbound air travel demand to develop targeted marketing strategies. We show how Big Data provides timely granular data essential in highly volatile markets. The results suggest that tourism management organisations must improve their Big Data analytical and evidence-based, decision-making skills.


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Recovering sustainably  
Global lessons for Japan's tourism industry



Development of Japan Sustainable Tourism Standard  
for Destinations (JSTS-D)

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- 1) Japan Tourism Agency's commitment to sustainable tourism
- 2) Local government survey on sustainable tourism
- 3) Japan's opportunity – with COVID era

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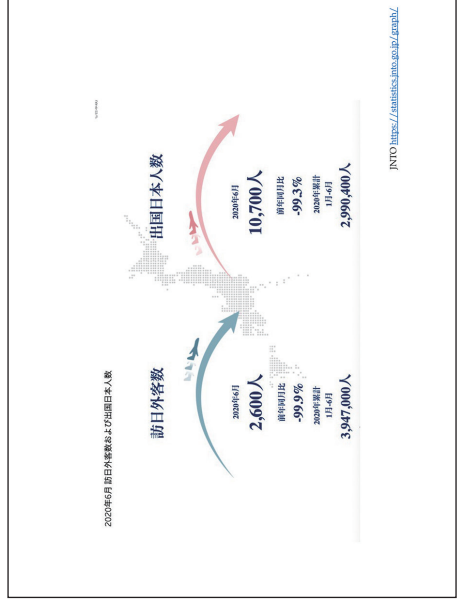


日本 × 旅  
持続可能な観光方針ガイドライン  
JSTS-D  
JAPAN SUSTAINABLE TOURISM STANDARD FOR DESTINATIONS

2020.6.29

観光庁 観光政策部 観光政策課 観光政策課長 藤田 浩一

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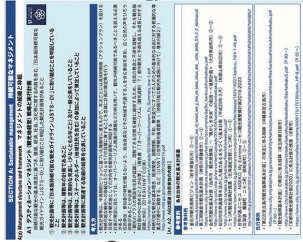


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## Japan standard

- Standards – 4 areas
- Steps for achieving goals
- Approaches
- References (eg good practices)



<https://www.nitto.go.jp/kankocho/tpac/01/01.htm>

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## Japan specific features

- National laws (eg water, waste)
- The laws and established practices are publicly communicated and enforced.
- Emphasis on local residents' views (at mood of nations, citizens)
- Specific features
  - *Maya* (Arbitr), *Shirahata*(unregistered)
  - Infectious disease
  - Focus on local residents
- Destination types – Nature, Urban, Culture/History, Onsen, Resort



The laws and established practices are publicly communicated and enforced (BS)

- 国定公園の自然環境の保全に関する法律(1964年2月) 国定
- 高度な自然環境を保全する法律(1994年2月) 国定
- 自然環境保全基本法(1989年12月)に際しての法律(2013年6月)
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The destination has targets to reduce energy consumption and improve energy efficiency (2018年12月)

The destination has a system to ensure compliance with local, national, and international laws and regulations (2018年12月)

The destination has a system to ensure compliance with local, national, and international laws and regulations (2018年12月)

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- Japan ST Standard for Destinations
- Glossary
- Destination profile (template)
- Logo (eligibility and application)
- GSDC-D 2.0 (Japanese version)
- Survey on sustainable tourism
- Best practices
- Provisional materials (for international visitors)

[https://www.nitto.go.jp/kankocho/topics/09\\_000148.html](https://www.nitto.go.jp/kankocho/topics/09_000148.html)

## 日本観光振興機構が作成した持続可能な観光ガイドラインを、ぜひ活用してください

日本観光振興機構が作成した持続可能な観光ガイドラインは、観光地や観光事業者が持続可能な観光を実現するための重要なツールです。ぜひ活用してください。

今年、国内外、旅行は、観光地や観光事業者が持続可能な観光を実現するための重要なツールです。ぜひ活用してください。

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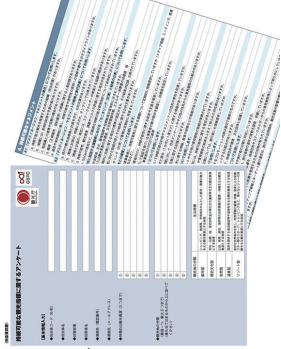
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## Sustainable tourism survey

- GSDC-D based questionnaire
- 150 questions (38 items x 3 or 4 questions)
- 5-scale response
- Destination profile (Destination by type, major resources)



## Survey

- 1/41 municipalities (tourism department/section)
- 2022.10-3.18
- Excel sent by mail

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**A. 持続可能な観光**

**A1. 持続可能な観光/観光の促進**

- Do you have an organisation (department/action) responsible for promotion of sustainable tourism?
- Does the organisation have a financial plan and budget showing current and future funding sources?
- Does the organisation have opportunities for engaging with other bodies?
- Does the organisation have records of permanent staff and contracted personnel, indicating relevant experiences?
- Does the organisation have management guidelines and processes that demonstrate awareness and adherence to sustainability with training of contracts?

**A2. 観光客の意識**

- Do you have programmes to educate tourists?
- Do you have programmes to educate staff and contractors?
- Do you have programmes to educate local residents?
- Do you have programmes to educate school children?
- Do you have programmes to educate the general public?

**B. 社会経済の持続可能性**

- Do you have programmes to support local businesses?
- Do you have programmes to support local employment?
- Do you have programmes to support local culture and heritage?
- Do you have programmes to support local environment?
- Do you have programmes to support local infrastructure?
- Do you have programmes to support local community development?
- Do you have programmes to support local social services?
- Do you have programmes to support local health and safety?
- Do you have programmes to support local education and training?
- Do you have programmes to support local research and innovation?
- Do you have programmes to support local arts and culture?
- Do you have programmes to support local sports and recreation?
- Do you have programmes to support local tourism development?
- Do you have programmes to support local marketing and promotion?
- Do you have programmes to support local public transport?
- Do you have programmes to support local waste management?
- Do you have programmes to support local water and energy supply?
- Do you have programmes to support local housing and shelter?
- Do you have programmes to support local food and agriculture?
- Do you have programmes to support local industry and commerce?
- Do you have programmes to support local finance and investment?
- Do you have programmes to support local labour and employment?
- Do you have programmes to support local social justice and equality?
- Do you have programmes to support local human rights and dignity?
- Do you have programmes to support local peace and conflict resolution?
- Do you have programmes to support local disaster risk reduction and resilience?
- Do you have programmes to support local climate change adaptation and mitigation?
- Do you have programmes to support local biodiversity and ecosystem services?
- Do you have programmes to support local natural resource management and conservation?
- Do you have programmes to support local cultural heritage and identity?
- Do you have programmes to support local intangible cultural heritage and knowledge systems?
- Do you have programmes to support local traditional knowledge and practices?
- Do you have programmes to support local indigenous and traditional communities?
- Do you have programmes to support local youth and children's development?
- Do you have programmes to support local ageing and social care?
- Do you have programmes to support local gender equality and women's empowerment?
- Do you have programmes to support local disability inclusion and accessibility?
- Do you have programmes to support local digital inclusion and connectivity?
- Do you have programmes to support local innovation and entrepreneurship?
- Do you have programmes to support local science, technology and innovation?
- Do you have programmes to support local research and development?
- Do you have programmes to support local intellectual property and knowledge management?
- Do you have programmes to support local data and information management?
- Do you have programmes to support local digital marketing and communication?
- Do you have programmes to support local public relations and media engagement?
- Do you have programmes to support local crisis and emergency management?
- Do you have programmes to support local disaster preparedness and response?
- Do you have programmes to support local recovery and reconstruction?
- Do you have programmes to support local resilience and risk management?
- Do you have programmes to support local governance and leadership?
- Do you have programmes to support local transparency and accountability?
- Do you have programmes to support local ethics and integrity?
- Do you have programmes to support local anti-corruption and fraud prevention?
- Do you have programmes to support local consumer protection and fair trade?
- Do you have programmes to support local labour rights and fair wages?
- Do you have programmes to support local occupational health and safety?
- Do you have programmes to support local environmental health and safety?
- Do you have programmes to support local food safety and quality management?
- Do you have programmes to support local product quality and standards?
- Do you have programmes to support local intellectual property and trademark protection?
- Do you have programmes to support local brand and reputation management?
- Do you have programmes to support local customer service and satisfaction?
- Do you have programmes to support local feedback and improvement?
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- Do you have programmes to support local feedback and improvement?
- Do you have programmes to support local innovation and innovation management?

**B1. Measuring economic contribution of tourism**

- Do you have programmes of economic data gathering?
- Do your annual reports include the direct and indirect economic contribution of tourism in the destination?
- Do you have data covering a range of measures of economic impact (e.g. volume, expenditure, employment, investment and distribution of economic benefits in the destination)?

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**C. 文化遺産の持続可能性**

**C1. 文化遺産の保護**

- Do you have a list of cultural assets, including evaluation and indication of vulnerability?
- Do you have programmes of rehabilitation and conservation of assets?
- Do you have mechanisms for using income from tourism to support conservation of cultural assets?

**C2. 文化遺産の管理**

- Do you have a list of cultural assets, including evaluation and indication of vulnerability?
- Do you have programmes of rehabilitation and conservation of assets?
- Do you have mechanisms for using income from tourism to support conservation of cultural assets?

**D. 自然遺産の持続可能性**

- Do you have a list of natural heritage sites and assets, identifying its type, conservation status and vulnerability?
- Do you have programmes to conserve biodiversity and natural heritage?
- Do you have programmes to eradicate and control invasive species?
- Do you have action to identify, monitor and mitigate tourism impacts on biodiversity and natural heritage?
- Do you have mechanisms for using income from tourism to support conservation of natural assets?

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**5-level scoring**

- 0: No
- 25: Planning to develop/do
- 50: Currently in development
- 75: Yes
- 100: Managed adequately (regularly monitored/ revised)

**A. 自然遺産の持続可能性**

項目	0	25	50	75	100
1. 自然遺産のリストアップ	0	25	50	75	100
2. 自然遺産の評価	0	25	50	75	100
3. 自然遺産の保護	0	25	50	75	100
4. 自然遺産の管理	0	25	50	75	100
5. 自然遺産の持続可能性	0	25	50	75	100

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**TOP 50 Total (ABCD/400)**

Destination type	No of responses (more than one)
Nature	498
Urban	143
Resort	354
Culture/History	437
Others	196

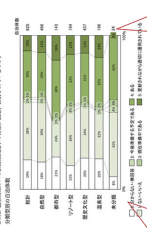
Region	No of responses
Hokkaido	97
Tohoku	56
Kanto	123
Chubu	129
Kinki	78
Chugoku	43
Shikoku	34
Kyushu & Okinawa	60

2020.2.10-3.18  
620 responses (35.6%)

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D10 (in your municipality/destination)  
Is the reduction target set and publicly reported?

環境部が公表している削減目標は、公表されていますか。

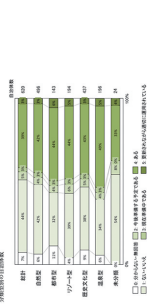


By destination type

Results for  
By destination  
• By category (A, B, C, D)  
• By region (8)  
• By destination type (6)

D11 (in your municipality/destination)  
Are you encouraging walking and cycling?

観光部が歩行者・自転車歩行者を奨励していますか。



By destination type

Relatively high response in a short period of time  
Only general tendency, not specific initiatives  
Responses – higher interest in sustainability issues  
Comments – “yes, but not specific to tourism”  
Common platform/language across sector

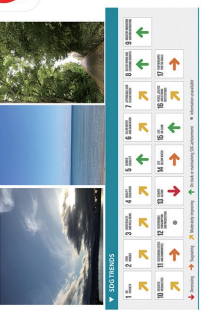
- Many have a system of cooperation with other organizations in promoting sustainable tourism.
- Relatively many opportunities to retrieve residents' opinions (eg questionnaires), but few had regular participation of residents in the development and operation of the plan.
- Visitor surveys are conducted in many municipalities, but few include specific questions about sustainability.
- Many are implementing safety initiatives.
- Many had documented crisis management and emergency response plans specifically for tourists & destinations.
- Few tourism-specific rules on exploitation, discrimination and harassment.
- Many have set reduction targets in greenhouse gas emissions, but few have developed specific strategies and action plans to address the challenges of climate change.
- Current initiatives on biodiversity and environmental conservation overall, but relatively more on energy conservation.

### Further steps -2020

- JSTS-D trials (5 model destinations +40 partner destination participants)
- GSTC-based training for DMO managers & Sustainability Coordinators
- Entry to international award scheme
- JSTS-D GSTC recognition

### COVID19 - Opportunity

- High awareness about safety & responsibility
- Radical measures (eg closure/ lockdown) possible (and accepted) if necessary
- Environmental improvement
- Changes in work style





## Opportunity - Japan

- Focus on regional areas
  - Local Government (City)
- Work-Life balance
  - Energy Digital Innovation (Edinova) (Joint partnership)
- Internationalisation
  - Standards - SKK6, GSTC



Ministry of the Environment <http://www.moe.go.jp/press/UD0803.html>  
Resilient-machi Digital Innovation Strategy  
Tokyo Open [www.tokyoopen.com](http://www.tokyoopen.com)



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