

**Towards the Realisation of a
Sustainable Tourism-Oriented Nation
- Recommendations for the Next
Tourism Nation Promotion Basic Plan –
〔Outline〕**

**14 October 2025
Keidanren**

1. Securing and Developing Human Resources to Support Japan's Tourism Industry

- (1) Streamlining and Improving Productivity Across the Entire Tourism Industry
- (2) Securing and Developing Digital Talent for Tourism
- (3) Promoting Tourism Human Resource Education

2. Addressing Overtourism

- (1) Dissemination of Best Practices
- (2) Effective Information Dissemination Using Social Media and Influencers
- (3) Strengthening Measures Against Illegal and Nuisance Behaviours

3. Development of Autonomous Tourism

- (1) Promoting Regional Dispersion and Attracting Visitors to Rural Areas
- (2) Strengthening the Functions of DMOs (Destination Management/Marketing Organisations)
- (3) Developing the Environment for Accepting Visitors in Rural Areas

4. Other Important Issues

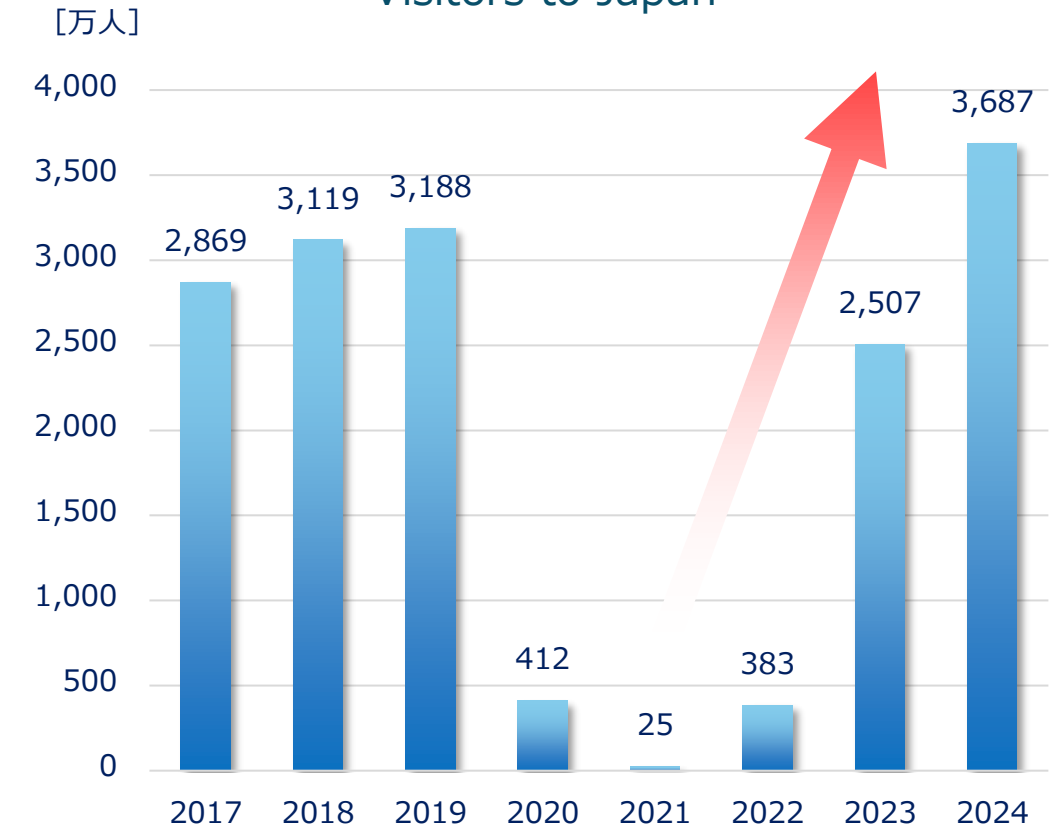
- (1) Establishing Tourism Industry Policy
- (2) Attracting High-Value Travelers
- (3) Promoting the Even Distribution of Tourism Demand and Diversified Tourism
- (4) Promoting MICE (Meetings, Incentives, Conferences, and Exhibitions)
- (5) Tourism-Related Taxation
- (6) Promoting Outbound Tourism

I . Introduction (1)

- In 2024, the number of inbound travellers reached approximately **36.87 million**, with total spending amounting to 8.1 trillion yen, **setting a new all-time record**.
- In 2025, as of the January–August period, the number has already reached 28.38 million, suggesting that the annual total is on pace to hit 40 million.



Figure : Trends in the Number of Inbound Visitors to Japan



(Source: Japan National Tourism Organization, JNTO)

There is no doubt that Japan's unique tourism resources—nature, culture (including food culture), history, and more—are widely recognised around the world as irreplaceable attractions that motivate visits to Japan.

I . Introduction (2)

However, despite these buoyant figures, Japan's tourism industry faces severe challenges from the perspective of "sustainability."

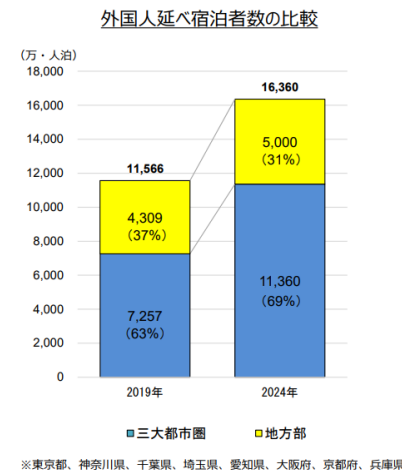
securing and developing human resources



overtourism



disparities between urban and rural regions



In this context, the question is whether Japan can realise a sustainable tourism-oriented nation, not only towards 2030 but also in the medium- to long-term looking towards 2040, while addressing the above challenges, revitalising domestic tourism, and ensuring that the benefits of inbound tourism are distributed nationwide.



観光立国懇談会報告書

—住んでよし、訪れてよしの国づくり—

2003年4月24日

観光立国懇談会

- The goal presented by the Government's Tourism Nation Roundtable (established in 2003)—“**Creating a country that is good to live in and good to visit.**”
- Tourism not only involves the aspect of “**seeing the light,**” in which visitors enjoy natural landscapes and famous sites, but also the aspect of “**showing the light,**” in which local residents, who welcome and host tourists, can feel happiness and pride.

However,



PROBLEMS

- Approx. 70% of foreign visitors' accommodations being concentrated in the three major metropolitan areas
- In some tourist destinations, overtourism—caused by congestion, breaches of etiquette, and other issues—is becoming more severe, leading not only to a decline in the convenience and satisfaction of tourists, but also to adverse effects on the daily lives of local residents
- Improving labour productivity, while also fostering and securing human resources

1. Securing and Developing Human Resources to Support Japan's Tourism Industry

(1) Streamlining and Improving Productivity Across the Entire Tourism Industry



Labour-saving measures and productivity improvements are especially urgent in the tourism industry



The government should strongly implement a "Labour-Saving Investment Promotion Plan" over the five-year period up to FY2029, to intensively promote labour-saving investments and productivity improvements across the broad tourism sector.

(2) Securing and Developing Digital Talent for Tourism



Growing demand to provide timely and appropriate information about tourist destinations by leveraging digital technologies



An organic collaboration with the tourism industry, which is facing a serious shortage of digital talent, in order to achieve the goals for developing digital human resources.

(3) Promoting Tourism Human Resource Education



Continuously identifying and nurturing the next generation of talent



Broad public awareness-raising across all segments of society regarding the importance of Japan's tourism industry, as well as the development of management-level personnel within the sector.

2. Addressing Overtourism

(1) Dissemination of Best Practices



There is no doubt that appropriate measures must be taken to address the increasingly serious issue of overtourism

- ▶ Scaling up concrete best practices that balance the acceptance of tourists with the quality of life of local residents

(2) Effective Information Dissemination Using Social Media and Influencers



Promoting understanding of Japan's customs and public manners through social media and other channels

- ▶ a) Expanding reach through multilingual support
- ▶ b) Proposing sustainable travel options
- ▶ c) Providing information on peak times and congested areas etc.

(3) Strengthening Measures Against Illegal and Nuisance Behaviours

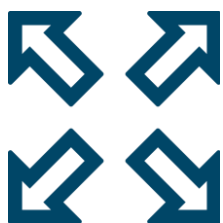


Illegal activities hinder the sound and sustainable development of tourism in Japan

- ▶ Strengthening enforcement to ensure that not only local residents but also legitimate businesses and well-behaved tourists do not suffer disadvantages

3. Development of Autonomous Tourism

(1) Promoting Regional Dispersion and Attracting Visitors to Rural Areas



While tourist accommodations are concentrated in the three major metropolitan areas, efforts to attract visitors to regional areas remain insufficient

▶ it is necessary for each region to highlight its unique charms and characteristics, and to advance tourism policies in conjunction with regional revitalization initiatives

(2) Strengthening the Functions of DMOs (Destination Management/Marketing Organisations)



Strengthening the functions of DMOs as control towers for enhancing services at the regional level and beyond

- ▶
- a) Promoting stronger wide-area collaboration
 - b) Expanding financial support and granting necessary authority
 - c) Supporting human resource development and the training of professionals

(3) Developing the Environment for Accepting Visitors in Rural Areas



Strengthening the functions of regional airports, including facility investments, to expand inbound reception capacity in regional areas

▶ Careful examination of incentive frameworks, taking into account sustainability considerations while paying attention to the balance between inbound and outbound tourism

4. Other Important Issues

(1) Establishing Tourism Industry Policy



Establishing industrial policies that contribute to improving the profitability of domestic businesses



Support measures coordinated across relevant ministries, as well as public-private partnerships that look beyond inbound and outbound tourism to encompass the broader global market

(2) Attracting High-Value-added Travelers



High-value-added travellers account for a large share of total spending



Implementing policies to reliably attract high-value travellers with high spending per capita, along with government support for the training of internationally qualified guides and related initiatives

(3) Promoting the Even Distribution of Tourism Demand and Diversified Tourism



Travel demand concentrated during long holiday periods triggers issues such as reduced convenience for tourists



Smoothing tourism demand through measures such as encouraging vacation-taking, promoting workcations and learning vacations, and expanding new forms of leisure activities

4. Other Important Issues

(4) Promoting MICE



MICE contributes to attracting visitors to regional areas while also enhancing international awareness among Japanese people

- ▶ Promoting initiatives to enhance the attractiveness of host destinations, strengthening information dissemination, and reinforcing collaboration among related organisations in each region

(5) Tourism-Related Taxation



a) The proper allocation of revenues from the International Tourist Passenger Tax

A challenge with the International Tourist Passenger Tax is that it is difficult to gain public understanding regarding the benefits to Japanese citizens, who are the taxpayers

- ▶ From the perspectives of legitimacy and fairness, it is desirable that the use of the passenger tax be structured in a way that clearly demonstrates returns to Japanese citizens

b) Accommodation Tax

It is expected to serve as a financial resource for regional economic revitalisation through tourism promotion, including infrastructure development and measures to address overtourism

- ▶ It is desirable to further examine appropriate tax rates tailored to local circumstances, ensure transparency in the use of revenues, and consider proper methods of implementation

4. Other Important Issues

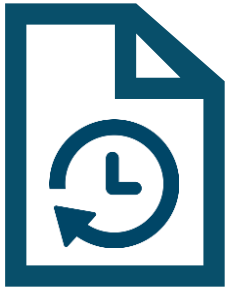
(6) Promoting Outbound Tourism



From the perspective of international competitiveness, the recovery of outbound tourism is also extremely important

- ▶ a) Simplification of travel procedures
- b) Alleviating anxieties about overseas travel and providing support
- c) Fostering international awareness and providing educational support





- A quarter of a century has passed since Keidanren's first policy proposal on tourism, "A Proposal on the Ideal Form of Tourism in the 21st Century Japan – For the Creation of a New Nation."
- Since then, Japan's tourism sector has made remarkable progress, including the establishment of the Japan Tourism Agency and a dramatic surge in inbound tourism.
- Amid these developments, the essence of tourism—"to see the light of the nation"—remains unchanged.



- While **shifting the focus from quantity to quality**, it is essential to once again strive to realise regions and tourism that harmoniously achieve the ideal of being both **"good to live in and good to visit,"** based on the **spirit of respect and welcome**.

Keidanren, based on this proposal, is determined to go beyond merely submitting requests to the government and other relevant parties, and will make every possible effort to address the various challenges ahead.

Keidanren
Policy & Action