

## Section 2

# KANSAI'S TOURISM STRATEGY: CURRENT SITUATION AND ISSUES BASED ON SURVEYS

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## 1. Introduction

In Section 1, we argued that an analysis of inbound tourism must examine the roles of brand power, tourism regionalization, and innovation, in addition to “safety, security and comfort” which is a concept advocated by APIR (see Figure B in Chapter 4 and Box 1 in Section 1). In particular, tourism regionalization plays a significant role when trying to encourage a more even distribution of tourists within a larger territory, beyond the crowded tourist attractions.

In order to shed light on the nature of tourism organizations in each prefecture, as well as their policies and issues, we have conducted a series of surveys. Based on the survey findings, we have identified the main policy issues and used these as a starting point for our discussion regarding post-pandemic inbound tourism strategies (for details, see [Table 4-2-1](#) at the end of this section).<sup>1)</sup>

## 2. Summary of survey findings by prefecture

### (1) Survey structure

This subsection introduces an analysis of data regarding foreign overnight guests, then summarizes the main findings of the interviews with the authorities of each prefecture.

In order to better understand the behavior of foreign visitors in Kansai's six prefectures, we examined data regarding the total number of foreign overnight guests by municipality for 2012, the year before the surge in shopping sprees by Chinese tourists known as “bakugai” or “explosive buying,” and for 2019, the year before the outbreak of the COVID-19 pandemic.<sup>2)</sup>

The main findings of the interviews are summarized based on the following key themes:

- Organizations in charge of inbound tourism promotion

1) For details regarding the tourism strategy of each prefecture, please consult the bibliography at the end of this section.

2) The present study is the result of a joint-research project with the Kinki District Transport Bureau. We take this opportunity to extend our gratitude.

- Prefectural approaches to the concept of “brand” and its implementation
- Measures to increase tourism expenditure and the number of foreign visitors
- The main challenges of tourism regionalization
- Cooperation with other local governments and DMOs (Destination Management Organization)

## (2) Survey findings

According to the Japan Tourism Agency (JTA), in 2019 the total number of foreign overnight guests in the greater Kansai area was 33,740,000. Of which, 17,930,000 guests chose Osaka Prefecture, while 12,030,000 guests chose Kyoto Prefecture. These figures correspond to 53.1% and 35.6% of the total and prove that overnight guests tend to concentrate in these two areas (Figure 4-2-1).

As for the rest of Kansai, the situation is as follows: Hyōgo, 1,370,000 guests (4.1%), Wakayama, 660,000 guests (2.0%), Nara, 540,000 (1.6%), and Shiga, 420,000 (1.3%). It is clear that the numbers paint a very different picture according to the prefecture.

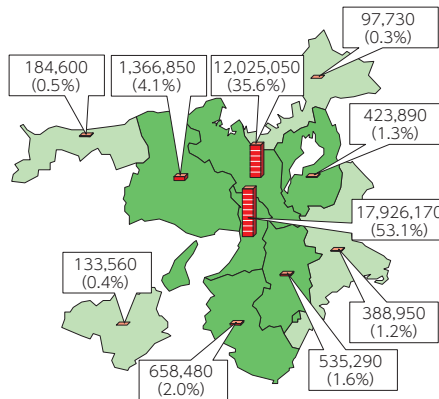


Figure 4-2-1

The total number of overnight guests in the greater Kansai region (2019)

Source: *Overnight Travel Statistics Survey* (JTA)

## 1) Shiga Prefecture

### [Data regarding foreign overnight guests]

A comparison of data for 2012 with 2019<sup>3)</sup> shows that the total number of foreign overnight guests grew by a factor of approximately 3 in the case of Ōtsu City, and 9 in the southern part of the prefecture (Moriyama and Yasu cities). In the northern part, in Takashima City, the number grew by a factor of approximately 8. Overall, there is an upward trend, especially in the southern part (Figure 4-2-2).<sup>4)</sup>

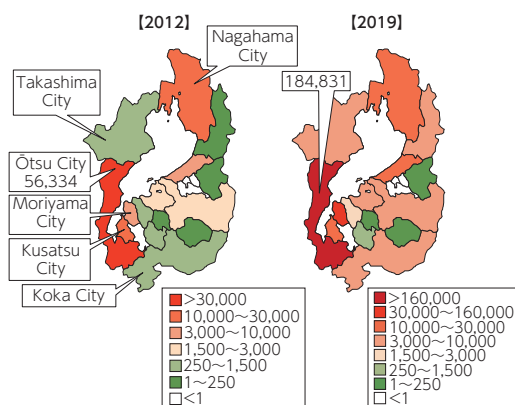


Figure 4-2-2

The total number of foreign overnight guests by municipality in Shiga Prefecture

Source: Prepared based on individual data from *Overnight Travel Statistics Survey* (JTA)

### [Organization in charge of inbound tourism promotion]

In Shiga Prefecture the Tourism Promotion Bureau (20 employees), part of the Commerce, Industry, Tourism and Labor Department, is in charge of tourism policies, including inbound tourism. Its main tasks are planning, domestic tours, attracting the film industry, and promoting “Biwaichi” (cycling around Lake Biwa). One person is in charge of promoting inbound tourism.

3) For a detailed account of nationality-based data for each municipality, see APIR (2021). This applies for all prefectures covered below.

4) On the other hand, the day time/night time visitor ratio in Shiga Prefecture peaked in 2015 and has been following a downward trend since 2016. This suggests a tendency to visit the prefecture during the day time and spend the night outside of it. Considering that the day time/night time visitor ratio in neighboring Kyoto Prefecture is on an upward trend, we can infer that foreign visitors are inclined to visit Shiga during the day and spend the night in Kyoto.

### **【Prefectural approaches to the concept of “brand”】**

Considering that Lake Biwa is located within the prefecture, water and nature are an important part of the local identity. Looking forward to the post-pandemic era, the prefecture is taking advantage of its proximity to major urban areas and the fact that it is relatively sparsely populated to create new types of tourism, such as work vacations, and to promote itself as a “workation” destination.

### **【Measures to increase tourism expenditure and the number of foreign visitors】**

Attracting visitors, especially from Kyoto City, was cited as a priority issue. For this reason, Kyoto Tower has been used to provide tourist information on Shiga Prefecture (Soko Shiga). In addition, promotion campaigns in the sister states/regions of Michigan (USA) and Hunan (China) advertised the history and the products of the prefecture, such as ninjas and Japanese sake. Since 2015, a PR campaign for cycling around Lake Biwa (“Biwaichi”) was developed in association with the Taiwanese bicycle manufacturer GIANT.

### **【The main challenges of tourism regionalization】**

Intermodal transportation to tourist attractions is a current issue. There are also ongoing efforts to translate information boards into foreign languages, starting with national heritage sites.

### **【Cooperation with other local governments and DMOs】**

Tourism product development is secured through close collaboration with Regional DMOs (Biwako Visitors Bureau). It is also working with the Union of Kansai Governments, the Central Japan Tourism Organization, and the Fukui-Shiga-Kyoto Tourism Promotion Council to encourage tourism in a coordinated manner.

## **2) Kyoto Prefecture**

### **【Data regarding foreign overnight guests】**

A comparison of data for 2012 with 2019 shows that the total number of foreign overnight guests grew by a factor of approximately 4 in Kyoto City, 3.8 in Miyazu City (northern part of the prefecture), and 8.9 in Kameoka City (central part). The share of Kyoto City was 98.4% in 2012, and 98.5% in 2019, reflecting the unbalanced distribution of guests across the prefecture (Figure 4-2-3).

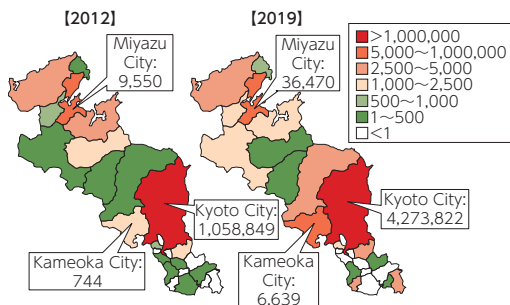


Figure 4-2-3

The total number of foreign overnight guests by municipality in Kyoto Prefecture

Source: Prepared based on individual data from *Overnight Travel Statistics Survey* (JTA)

### [Organization in charge of inbound tourism promotion]

In Kyoto Prefecture, the Commerce, Industry, Labor and Tourism Department (23 employees) is in charge of tourism policies. Its main tasks are planning and coordination of tourism policies, development of accommodation facilities, promotion of tourism and information dissemination about each region of the prefecture, international tourism, tourism regionalization and attraction of MICE tourism.

### [Prefectural approaches to the concept of “brand” ]

The entire prefecture except Kyoto City is divided into four areas collectively branded as “Another Kyoto:” “Kyoto by the Sea” (northern part of the prefecture), “Woodland Kyoto” (central part), “Kyoto Tea Country” (southern part), and “Kyoto Otokuni Bamboo Grove” (Mukō and Nagaokakyō cities, and Ōyamazaki town).<sup>5)</sup>

### [Measures to increase tourism expenditure and the number of foreign visitors]

The Tourism Office conducts PR campaigns through online business meetings and videos promoting Kyoto in places such Hong Kong and Taiwan, which have a high ratio of repeat tourists. The campaigns also target markets with high potential such as Thailand. Since 2014, the prefecture has also established a “tour-

5) The DMOs established in these areas are registered with JTA as follows: Kyoto by the Sea, Woodland Kyoto, and Kyoto Tea Country. In the case of Kyoto Otokuni Bamboo Grove area, neither a registered DMO nor a candidate DMO has yet been established.

ism representative”<sup>6)</sup> who has the role of liaising with local officials, gathering market data, and disseminating information in key markets such as Taiwan and Hong Kong.

Markets with high tourism expenditure, such as Europe, the USA, and Australia, are also targeted. Nevertheless, the emphasis is on the Australian market, which is easier to travel to and has fewer major cities, making it less complicated to narrow down PR campaign targets. Promotion campaigns and online business meetings are organized in Melbourne.

Each DMO also conducts independent PR activities. For example, the Kyoto by the Sea DMO focuses on Australia, where the idea of “seaside” is popular, while the Woodland Kyoto DMO focuses on the USA. There is no overseas PR campaign yet in the case of the Kyoto Tea Country DMO.

### **[The main challenges of tourism regionalization]**

The main challenge is to encourage visitors, the majority of which concentrate in Kyoto City, to also visit other parts of the prefecture in order to increase the economic ripple effect of tourism.

### **[Cooperation with other local governments and DMOs]**

There is a significant number of collaborations with other prefectures.

- The establishment of the “Japan Luxury Travel Alliance” (Ishikawa Prefecture, Kyoto City, Sapporo City, Takayama City, Nara City, Wakayama Prefecture) in order to attract wealthy Western tourists.
- Promotion of San’in Coast Geopark (with Hyōgo and Tottori prefectures).
- Overseas PR campaign implemented through cooperation between Japan Railways and the 12 prefectures along the Hokuriku Shinkansen line.
- Cooperation based on the national heritage (with Fukui and Shiga prefectures).
- Educational travel promotion campaign in Taiwan (with Osaka, Nara, Hyōgo, Wakayama prefectures).

All of the DMOs in the prefecture have the vice-governor of Kyoto Prefecture as their vice-president, and Kyoto Prefecture officials among their staff. In addition, Kyoto Prefecture is in charge of the secretariat of the Tourism Sector Bureau (Union of Kansai Governments), and is also working on promoting the entire Kansai region overseas in cooperation with the Kansai Tourism Bureau.

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6) In addition to gathering information regarding the local travel trends, the tourism representative also offers information about the sightseeing areas in Kyoto Prefecture to the local companies and media, and conducts promotional campaigns to attract foreign visitors.

In most cases, cooperation with the municipalities within the prefecture is done indirectly through the respective local DMOs.

### 3) Osaka Prefecture

#### 【Data regarding foreign overnight guests】

A comparison of data for 2012 with 2019 shows that the total number of foreign overnight guests grew by a factor of approximately 4.7 in Osaka City, 4.8 in Sakai City, and 2.2 in Izumisano City where Kansai International Airport (KIX) is located. While the number of foreign guests has been increasing steadily in both the north and south of the prefecture, the overwhelming majority continue to choose Osaka City for their stay (Figure 4-2-4).

Osaka City's share within Osaka Prefecture expanded from 79.1% in 2012 to 86.0% in 2019, while during the same interval Izumisano City's share shrank from 14.4% to 7.7%. It appears that Osaka City's increasing number of lodging facilities improved its capacity to accommodate guests arriving at KIX.

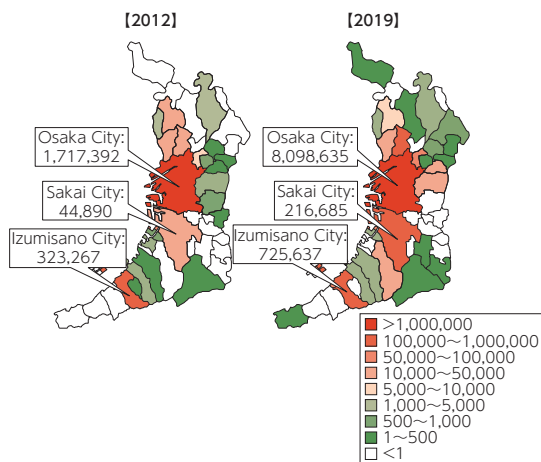


Figure 4-2-4

The total number of foreign overnight guests by municipality in Osaka Prefecture

Source: Prepared based on individual data from *Overnight Travel Statistics Survey* (JTA)

#### 【Organization in charge of inbound tourism promotion】

Osaka Prefecture's organizations in charge of tourism are the Planning and Tourism Division (27 employees) and the Urban Development Promotion Division (23 employees), both are part of the Urban Development Bureau. The planning and implementation of measures such as tourism promotion are entrusted

to the Osaka Convention & Tourism Bureau (DMO for regional cooperation).

### **[Prefectural approaches to the concept of “brand” ]**

Osaka Prefecture tries to appeal to tourists by promoting itself as a place of diversity<sup>7)</sup> in terms of cuisine, culture, history, entertainment, etc.

### **[Measures to increase tourism expenditure and the number of foreign visitors]**

Considering that 75% of foreign visitors are from East Asia, one of the main post-pandemic goals is to encourage their return. Europe, the USA, and Australia are also seen as potential target markets due to their high tourism expenditure. Nevertheless, considering the current restrictions on international travel, for now the primary objective is to stimulate domestic tourism.

While the Osaka Convention & Tourism Bureau is in charge of promotion, the aforementioned Urban Development Bureau divisions are in charge of developing new tourist routes across the prefecture, as well as urban zoning and uncovering potential tourist attractions in Osaka City.

### **[The main challenges of tourism regionalization]**

One of the main goals is to attract visitors from Western markets and encourage them to stay longer and spend more by integrating the north, east and south of the prefecture with Osaka City. This is believed to expand the positive economic effects of tourism across the prefecture. The main measures to achieve that goal are:

- PR campaigns promoting history (tumuli, Osaka Castle, etc.), culture, and cuisine.
- the implementation of a regulatory system for special private lodging areas in order to cope with the increasing number of foreign visitors.
- testing the feasibility of a sightseeing bus linking Osaka and Sakai cities.

### **[Cooperation with other local governments and DMOs]**

The Urban Development Bureau divisions in charge of tourism share their strategy with Osaka City, while also offering support to other municipalities for their respective initiatives.

In terms of cooperation with DMOs, the Osaka Convention & Tourism Bu-

7) This idea is also reflected by the “Osaka City Urban Development Strategy – 2025,” one of the goals of which is to project the image of a “diverse tourist city.”



reau enjoys a high degree of freedom in developing policies, in addition to its role in marketing, promotion and information dissemination.

#### 4) Hyōgo Prefecture

##### [Data regarding foreign overnight guests]

Comparing the data for 2012 and 2019 shows that the total number of foreign overnight guests grew by a factor of approximately 3 in Kobe City, but just 2 in Harima and Tamba provinces. On the other hand, in Tajima province (Toyo'oka City, Kami and Shin'onsen towns) the number of guests expanded ten-fold. However, the large majority of guests are concentrated in Kobe, Toyo'oka and Himeji cities. Fixing this uneven distribution represents a major challenge (Figure 4-2-5).

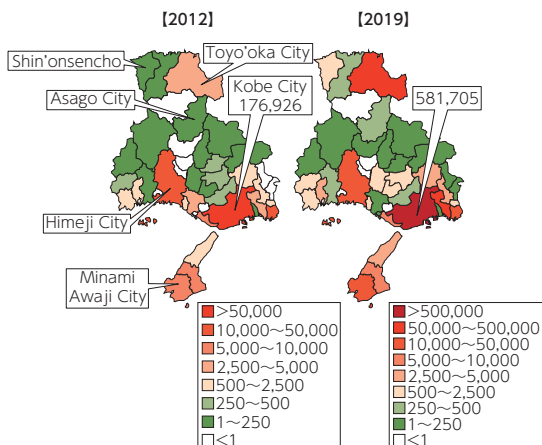


Figure 4-2-5

The total number of foreign overnight guests by municipality in Hyōgo Prefecture

Source: Prepared based on individual data from *Overnight Travel Statistics Survey* (JTA)

##### [Organization in charge of inbound tourism promotion]

In Hyōgo Prefecture, the Tourism Bureau (14 employees), part of the Industry and Labor Department, is in charge of tourism policies. It is further divided into the Planning and Promotion divisions which are handling both domestic and foreign affairs. In addition, the bureau is sharing the same location with the Hyōgo Tourism Head Office (27 employees), the prefecture-level DMO, thus encouraging a close relationship between the two.

### **[Prefectural approaches to the concept of “brand” ]**

Given the distinct nature of each of the five regions forming it and although each region has abundant tourist resources, there is not a single unified brand of “Hyōgo Prefecture.” The PR campaigns revolve around promoting the prefecture as a place of different elements with tourist potential such as Himeji Castle, Kobe beef, and so on.

### **[Measures to increase tourism expenditure and the number of foreign visitors]**

The bureau has established an overseas office for PR purposes and it is also planning to attract more visitors via regional airports in neighboring Chugoku and Shikoku. As in Nara Prefecture, described below, Hyōgo also uses former school principals to assist with welcoming school trips from abroad.

The bureau is also involved in numerous overseas travel expos in collaboration with the major cities in the prefecture. It has also adopted a proactive stance in developing a certain amount of tourist products in association with prefectural DMOs.

### **[The main challenges of tourism regionalization]**

In terms of regional PR, the bureau is struggling to find a balance between focusing on the core strengths of the prefecture and fairness toward all of its five provinces. As the five regions are dispersed, the development of tourist routes and intermodal transportation are a current issue.

### **[Cooperation with other local governments and DMOs]**

The Hyōgo Tourism Head Office is also playing a part in inbound tourism-related activities, while the prefecture is the one initiating the action plans.

## **5) Nara Prefecture**

### **[Data regarding foreign overnight guests]**

Comparing the data for 2012 and 2019 shows that the total number of foreign overnight guests grew by a factor of approximately 10 in Nara City, while in Iko-ma City it grew by an impressive factor of 34 (both are located in the northern part of the prefecture). In the western part, in Heguri Town, where Mount Shigi is located, the number grew by a factor of approximately 10. Meanwhile in the eastern part, it grew approximately ten fold in Tenri City, and by 3 in Kashihara City. In the southern part, it grew by a factor of approximately 26 in Gojō City, 9 in Yoshino Town, 13 in Tenkawa Village, and 8 in Totsukawa Village (Figure 4-2-6).

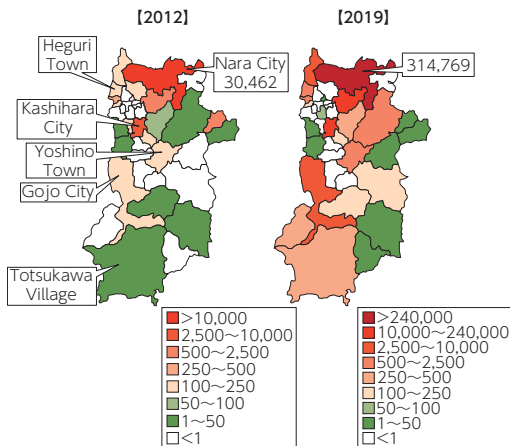


Figure 4-2-6

The total number of foreign overnight guests by municipality in Nara Prefecture

Source: Prepared based on individual data from *Overnight Travel Statistics Survey* (JTA)

While the increase rate is significant overall, considering that overnight guests tend to concentrate in the northern part, attracting them to entire prefecture remains an issue.

**[Organization in charge of inbound tourism promotion]**

In Nara Prefecture, the Tourism Bureau (approximately 50 employees), part of the Industry, Tourism and Employment Promotion Department, is in charge of tourism policies, which includes inbound tourism. Its main tasks cover improving tourism infrastructure, accommodations, attracting tourists, disseminating information, and attracting MICE tourism.

**[Prefectural approaches to the concept of “brand” ]**

The core of Nara Prefecture’s brand is represented by its rich “nature, history and cultural assets.” In order to attract new tourists, it is necessary to capitalize on Nara’s rich heritage, and to make its charm more widely known.

**[Measures to increase tourism expenditure and the number of foreign visitors]**

One coordinator is appointed to promote Nara Prefecture to the Chinese-speaking world. Similarly, a former school principal is appointed to use their connections and experience in order to attract school trips from overseas. One of the current challenges is to increase Nara’s popularity among Europeans, so the

bureau is focusing on activities such as travel exhibitions.

Policies to increase expenditure by foreign tourists aim to develop nature-based experiences and to improve the attractiveness of the city. The prefecture is focusing on improving the overall accommodation capacity of traditional Japanese inns (*ryokan*) and hotels, while making efforts to promote a more even distribution of accommodation facilities, considering that most are located in Nara City.

### **【The main challenges of tourism regionalization】**

One of the main challenges when trying to attract tourists to the prefecture is the transport infrastructure.

In order to tackle this issue, the prefecture is making efforts to ensure that public transportation is smooth, comfortable, and easy to use for foreigners. It is also promoting the use of major highways, such as the Keinawa Expressway (connecting Kyoto, Nara and Wakayama), and cycling routes which can contribute to the encouragement of tourism.

### **【Cooperation with other local governments and DMOs】**

Municipalities, tourism associations, and DMOs have been cooperating with each other through city planning agreements and meetings at various levels. However, it is necessary to clarify the roles and responsibilities of each entity and to further strengthen cooperation so that they can work on tourism promotion in a coordinated and proactive manner.

## **6) Wakayama Prefecture**

### **【Data regarding foreign overnight guests】**

Comparing the data for 2012 and 2019 shows that the total number of foreign overnight guests grew by a factor of approximately 4.1, the upward trend being the most prominent in the south of the prefecture. By main municipality, the number of guests grew by a factor of approximately 9 in Wakayama City, 4 in Shirahama Town, 5 in Kōya Town, and 17 in Tanabe City (Figure 4-2-7).

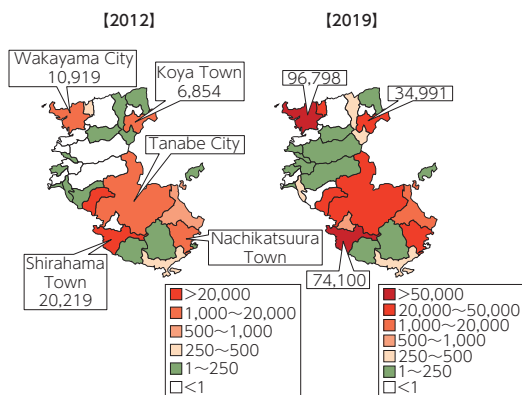


Figure 4-2-7

The total number of foreign overnight guests by municipality in Wakayama Prefecture

Source: Prepared based on individual data from *Overnight Travel Statistics Survey* (JTA)

### 【Organization in charge of inbound tourism promotion】

In Wakayama Prefecture, the Tourism Bureau, part of the Department of Commerce, Industry, Tourism and Labor, is in charge of tourism policies, which includes inbound tourism. Its main tasks are divided between domestic and foreign operations. Including members of the Wakayama Tourism Federation, which has its office within the Tourism Bureau, the total number of employees is approximately 50.

### 【Prefectural approaches to the concept of “brand”】

Wakayama prefecture is blessed with a wide variety of tourist attractions such as the Kumano Kodo Pilgrimage Routes, Mount Kōya, and the Shirahama hot springs, which it can use to attract foreign visitors.<sup>8)</sup> Its PR campaigns aim to make use of historical and cultural assets, including World Heritage sites, in a sustainable way.

### 【Measures to increase tourism expenditure and the number of foreign visitors】

Even before Japan’s foreign tourism boom, businesses in the prefecture were proactively building relationships with major travel agencies in Hong Kong, Taiwan, and South Korea, and were adapting their tourist products to the needs of the respective markets. As a result, a large number of overnight guests in destinations such as Shi-

8) Since before the COVID-19 pandemic, the prefecture is targeting domestic customers in the Tokyo area by running a marketing campaign promoting itself as a “workation” destination. The campaign takes advantage of the short travel time between Tokyo and Wakayama due to direct flights from Haneda Airport to Nanki Shirahama Airport.

rahama were from East Asia. In addition, numerous promotion campaigns launched in collaboration with international news websites such as BBC or CNN, and travel websites such as Lonely Planet, led to a high ratio of visitors from Western countries.

### **【The main challenges of tourism regionalization】**

Most accommodation facilities in the prefecture are tailored for group tours, so their main challenge is to adapt to the needs of individual tourists and increase expenditure per capita.

Another issue is developing tourist routes that enhance regional interconnectivity between different attractions of the Kii Peninsula area.

### **【Cooperation with other local governments and DMOs】**

Considering the developmental stage of private DMOs and other players in the prefecture, Wakayama is taking the lead in inbound tourism policies.

## **3. The current situation and the main challenges in the six prefectures of Kansai**

Our analysis showed that policies and approaches toward tourism differ greatly from one prefecture to another, according to their geographical conditions and maturity as tourist destinations. We can summarize our analysis through the following main ideas.<sup>9)</sup>

- (1) Shiga Prefecture is taking advantage of its rich natural assets, including Lake Biwa, to develop a unique appeal mindful of the post-pandemic travel trends. It takes advantage of these assets as a PR tool and tries promoting them through PR campaigns such as “Soko Shiga.”
- (2) Kyoto Prefecture is trying to overcome the problem posed by the unbalanced tourist distribution in favor of Kyoto City by promoting less known destinations within the prefecture.
- (3) Osaka Prefecture is focusing on diversity as the main distinguishing factor to increase its appeal, mainly through the Osaka Convention & Tourism Bureau.
- (4) Hyōgo Prefecture is bringing to the forefront of its PR campaign the distinct characteristics of its five regions.
- (5) Nara Prefecture is trying to encourage forms of tourism which imply overnight accommodation within the prefecture and a higher level of expenditure per capita.
- (6) Wakayama Prefecture, under the leadership of the local government, is

9) For details regarding the tourism strategy of each prefecture, see the reference literature.

running PR campaigns for its numerous tourist attractions and encourages cooperation among stakeholders.

Each prefecture has its own unique system to stimulate the development of inbound tourism, leading to differences in terms of scale, policies, and division of responsibilities. This reflects the differences in each prefecture's stance toward inbound tourism and the importance it gives to this sector.

While the specifics of each prefecture's situation may vary, all of them are working on tourism regionalization. In this context, detailed measures are required to compensate for the lack of infrastructure and encourage coordination with local communities. Regional development cannot be carried out by the government alone, and the role of DMOs will become even more important, considering their ability to lead the way in public-private sector synergy, and work closely with local communities while enjoying a certain degree of freedom of action.

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Table 4-2-1 Survey items and content

	Shiga Pref.	Kyoto Pref.	Osaka Pref.
Organization	Tourism Bureau (approx. 20 employees in total, 1 employee in charge of inbound tourism)	Commerce, Industry, Labor and Tourism Department (23 employees)	Planning and Tourism Division (27 employees), part of the Urban Development Bureau
Measures to increase the number of foreign visitors	<ul style="list-style-type: none"> <li>PR campaign in Taiwan in association with the bicycle manufacturer GIANT.</li> <li>Participation to travel expos in 2018-19.</li> <li>Promotion campaigns in Michigan (USA) and Hunan (China), in addition to France and the UK.</li> </ul>	<ul style="list-style-type: none"> <li>Promoting less-known areas of the prefecture in places such as Hong Kong and Taiwan, which have a high ratio of repeat tourists. An increase in the number of visitors from Thailand is also expected.</li> </ul>	<ul style="list-style-type: none"> <li>Attracting both Asian and non-Asian tourists.</li> </ul>
Measures to increase consumption	<ul style="list-style-type: none"> <li>Online advertising of nature, water sports, ceramics, etc. Planning a PR campaign centered around cycling in France and the UK.</li> </ul>	<ul style="list-style-type: none"> <li>PR campaigns in markets with high tourism expenditure, such as Europe, the USA, and Australia.</li> </ul>	<ul style="list-style-type: none"> <li>Future PR campaigns in Western countries focusing on history, culture, and cuisine.</li> <li>Increase the accommodation capacity of hotels and private lodging.</li> <li>Develop new tourist routes across the prefecture and uncover Osaka's hidden tourist potential.</li> </ul>
Views toward the "brand" concept	<ul style="list-style-type: none"> <li>Lake Biwa and nature are an important part of the local identity. Tries to promote itself as a "workation" destination.</li> </ul>	<ul style="list-style-type: none"> <li>The entire prefecture except Kyoto City is divided into three categories collectively branded as "Another Kyoto," which is made up of "Kyoto by the Sea," "Woodland Kyoto," "Kyoto Tea Country," and "Kyoto Otokuni Bamboo Grove."</li> </ul>	<ul style="list-style-type: none"> <li>Promote Osaka Prefecture as a place of diversity in terms of cuisine, culture, history, entertainment, etc., not bound by stereotypes.</li> </ul>
Tourism regionalization	<ul style="list-style-type: none"> <li>Trying to attract foreign visitors from Kyoto.</li> <li>Ongoing efforts to improve intermodal transportation and to translate information boards into foreign languages.</li> </ul>	<ul style="list-style-type: none"> <li>Encourage visitors concentrated in Kyoto City to also visit other parts of the prefecture.</li> <li>Subsidize bus companies to offer bus passes for the aforementioned regions: "Kyoto by the Sea," "Woodland Kyoto," and "Kyoto Tea Country."</li> </ul>	<ul style="list-style-type: none"> <li>Attract tourists from Osaka City to the north, east and south of the prefecture.</li> <li>Test the feasibility of a sightseeing bus linking Osaka and Sakai cities, and publish tourist maps of the areas surrounding the tumuli, etc.</li> </ul>
Cooperation with other local governments	<ul style="list-style-type: none"> <li>Collaboration with Fukui Prefecture for a PR campaign in Europe promoting World Heritage sites. Advertisements in overseas magazines, invitations to domestic tour operators, etc.</li> </ul>	<ul style="list-style-type: none"> <li>Promotion of the San'in Coast (with Hyogo and Tottori), national heritage (with Fukui and Shiga), Miketsukuni Food Country (with Mie, Fukui, Hyogo), etc. In addition, an Overseas PR campaign implemented through cooperation between Japan Railways and the 12 prefectures along the Hokuriku Shinkansen line.</li> </ul>	<ul style="list-style-type: none"> <li>It is cooperating with the Union of Kansai Governments (Tourism Division) for promotion campaigns such as the creation and distribution of pamphlets. The theme is decided by the Union of Kansai Governments.</li> </ul>
Cooperation with municipalities within the prefecture	<ul style="list-style-type: none"> <li>PR campaigns are almost always done through local DMOs. In some cases, direct communication with municipalities is also used.</li> </ul>	<ul style="list-style-type: none"> <li>In most cases, cooperation with the municipalities within the prefecture is done indirectly through the respective local DMOs.</li> </ul>	<ul style="list-style-type: none"> <li>It offers support to local municipalities for their PR initiatives.</li> <li>Shares the same tourism strategy with Osaka City.</li> </ul>
Cooperation with DMOs & Division of responsibilities	<ul style="list-style-type: none"> <li>In PR campaigns, it collaborates with the Kansai Tourism Bureau, while tourist product development is secured through close collaboration with local DMOs.</li> </ul>	<ul style="list-style-type: none"> <li>Constant cooperation for inbound tourism.</li> <li>Collaboration with the Kyoto Tourism Federation and three regional DMOs, including personnel.</li> </ul>	<ul style="list-style-type: none"> <li>The Osaka Convention &amp; Tourism Bureau enjoys a high degree of freedom in developing policies in terms of promotion and marketing.</li> </ul>
DMOs & Tourism associations within the prefecture	<ul style="list-style-type: none"> <li>Biwako Visitors Bureau (30 employees) (according to the "Japanese DMO Formation and Establishment Plan")</li> </ul>	<ul style="list-style-type: none"> <li>Collaborating with the Kyoto Tourism Federation and the three regional DMOs, including sharing personnel.</li> </ul>	<ul style="list-style-type: none"> <li>The Osaka Convention &amp; Tourism Bureau is responsible for promotion campaigns.</li> </ul>
Form of cooperation with the Kansai Tourism Bureau	<ul style="list-style-type: none"> <li>Strong relationship. Consensus must be reached for every action.</li> </ul>	<ul style="list-style-type: none"> <li>All the DMOs in the prefecture have the vice-governor of Kyoto Prefecture as their vice-president, and Kyoto Prefecture officials as their staff.</li> <li>The prefecture entrusts some of its PR campaigns to the Bureau, and it is also participating in familiarization trips organized by the Bureau as part of its mass media campaigns.</li> </ul>	<ul style="list-style-type: none"> <li>Collaboration for promotion campaigns (creation and distribution of pamphlets).</li> <li>While the theme is decided by the Union of Kansai Governments, the prefecture is in charge of tourist product development.</li> </ul>
Cooperation with DMOs from other regions	Central Japan Tourism Organization	—	—

Source: based on the surveys conducted by APIR at tourist organizations in each prefecture.

Hyōgo Pref.	Nara Pref.	Wakayama Pref.
<p>Tourism Bureau (14 employees) (&amp; Hyōgo Tourism Head Office (27 employees))</p>	<p>Tourism Bureau (approx. 50 employees)</p>	<p>Tourism Bureau &amp; Wakayama Tourism Federation (approx. 50 employees in total, 13 or 14 employees in charge of inbound tourism)</p>
<ul style="list-style-type: none"> <li>The prefecture's overseas offices and tourist information counters conduct PR campaigns.</li> <li>Former school principals are in charge of international exchanges between schools.</li> </ul>	<ul style="list-style-type: none"> <li>It focuses on PR campaigns in Europe (especially France).</li> <li>One coordinator is appointed to promote the prefecture to Chinese visitors.</li> <li>Former school principals are in charge of international exchanges between schools.</li> </ul>	<ul style="list-style-type: none"> <li>Even before Japan's foreign tourism boom, businesses in the prefecture were developing tourist products in cooperation with travel agencies in Hong Kong, Taiwan, and South Korea, while strengthening their relationships.</li> <li>Numerous promotion campaigns run in collaboration with international news and travel websites.</li> </ul>
<ul style="list-style-type: none"> <li>Currently, two producers of the Hyōgo Tourism Head Office are in charge of developing new tourist products.</li> </ul>	<ul style="list-style-type: none"> <li>Development of accommodation facilities on prefectural land.</li> <li>Tourist product development in order to attract more visitors to the southern part of the prefecture.</li> <li>Development of activities that can be done in the morning.</li> </ul>	<ul style="list-style-type: none"> <li>Accommodation facilities tailored to groups are making investments in order to become able to accommodate the needs of individual tourists, and increase consumption per capita.</li> </ul>
<ul style="list-style-type: none"> <li>PR campaigns focus on each individual tourist location, such Kobe or Himeji, rather than trying to promote a unified image of the prefecture.</li> </ul>	<ul style="list-style-type: none"> <li>The promotion campaign focuses on the historical and cultural heritage. In addition, tourist products centered around nature and tumuli ("Walking Nara") are also being refined.</li> </ul>	<ul style="list-style-type: none"> <li>Its PR campaigns promote sustainable tourism based on nature and historical heritage such as Kumano Kodo, Mount Kōya and the Shirahama hot springs.</li> </ul>
<ul style="list-style-type: none"> <li>Tries to attract tourists from Osaka and Kyoto to the prefecture's five provinces.</li> <li>It is also planning to attract more visitors via regional airports located in Western Japan.</li> </ul>	<ul style="list-style-type: none"> <li>Encourage visitors concentrated in the north to also visit other parts of the prefecture.</li> <li>Currently, it is investing in major highways, such as the Keinawa Expressway (connecting Kyoto, Nara and Wakayama), and cycling routes.</li> </ul>	<ul style="list-style-type: none"> <li>The limited accommodation capacity of tourist attractions during certain seasons represents a current issue (for example, Shirahama during the summer season, and Mount Kōya during autumn season).</li> <li>It aims to involve Mie Prefecture in the development of tourist routes that cover all of Kii Peninsula.</li> </ul>
<ul style="list-style-type: none"> <li>It is focusing on promotion through the Kansai Tourism Bureau and the Union of Kansai Governments.</li> </ul>	<ul style="list-style-type: none"> <li>Cooperation with Wakayama Prefecture to jointly promote tourist attractions such as Mount Kōya and Kumano Hongū Shrine.</li> </ul>	<ul style="list-style-type: none"> <li>Developing tourist routes in cooperation with the southern part of Nara Prefecture.</li> <li>Developing the "Pilgrim and Mount Kōya" route in cooperation with Tokushima and Kagawa prefectures.</li> </ul>
<ul style="list-style-type: none"> <li>It offers consultancy for each proposal.</li> </ul>	<ul style="list-style-type: none"> <li>It offers consultancy for each proposal.</li> </ul>	<ul style="list-style-type: none"> <li>Conducting a promotion campaign in association with Wakayama City. In addition, the prerogatives of the city and those of the prefecture are clearly delineated.</li> </ul>
<ul style="list-style-type: none"> <li>The prefecture is in charge of planning, while DMOs are in charge of tourist product development and promotion campaigns.</li> </ul>	<ul style="list-style-type: none"> <li>The prefecture is in charge of planning and promotion campaigns, while DMOs are in charge of tourist product development.</li> </ul>	<ul style="list-style-type: none"> <li>The prefectural government is collaborating with city halls, chambers of commerce and industry, etc., by focusing on social networking.</li> </ul>
<ul style="list-style-type: none"> <li>It shares the same office space with the Hyōgo Tourism Head Office (27 employees).</li> </ul>	<ul style="list-style-type: none"> <li>Nara Prefecture Visitors Bureau (approx. 20 employees)</li> </ul>	<ul style="list-style-type: none"> <li>The Wakayama Tourism Federation and the prefectural Tourism Bureau have a total of 13 or 14 employees in charge of inbound tourism.</li> </ul>
<ul style="list-style-type: none"> <li>It accepts or rejects the initiatives (exhibitions, familiarization trips, etc.) created by the Bureau on a case-by-case basis.</li> </ul>	<ul style="list-style-type: none"> <li>It accepts or rejects the initiatives (exhibitions, familiarization trips, etc.) created by the Bureau on a case-by-case basis.</li> </ul>	<ul style="list-style-type: none"> <li>Field trips, etc.</li> </ul>
<p>Setouchi Tourism DMO</p>	<p>—</p>	<p>—</p>