

Possible contributions by Airlines to Sustainable Tourism and Destination Management

持続可能な観光と地域づくりのための 航空会社による貢献の可能性

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Key Points of Today's Presentation

<Background of the Research>

- ✈ Trajectory of Sustainable Tourism
- ✈ Why this research was conducted
- ✈ Seven issues related to sustainable tourism and human exchange

<Interview Research with Airlines>

- ✈ ANA
- ✈ JAL
- ✈ MAG

<Possible Contributions of Airlines to Sustainable Tourism and Destination Management>

- ✈ Recommendations for Airlines going forward

Trajectory of Sustainable Tourism

1960s Rapid expansion of mass tourism
 1990s Birth of sustainable tourism
 2005 Sustainable tourism defined (UNEP, UNWTO)
 2016~2030 “SDG’s : Sustainable Development Goals” (United Nations General Assembly)

JAPAN		THAILAND
Yakushima and Shirakami-Sanchi became Japan’s first natural world heritage sites. The Agricultural, Mountain, and Fishing Village Leisure Law” is enacted to promote green tourism. The Japan Ecotourism Society (JES) is established (private).	1990s	Birth of Community Based Tourism (CBT)(Private)
“Japanese DMO Candidate Corporation System” introduced (Japan Tourism Agency)	2003	Designated Areas for Sustainable Tourism Administration(DASTA) established
“JSTS-D Japan Sustainable Tourism Standard for Destinations” formulated (JTA)	2015 2016	SDG’s becoming a national strategy (Thai government)
“Fourth Tourism Nation Promotion Basic Plan” (JTA)	2020	「Sustainable Tourism Goals(STG’s)」 formulated 「Sustainable Tourism Acceleration Rating(STAR)」 operated (Tourism Authority of Thailand TAT)
“Fifth Tourism Nation Promotion Basic Plan (planned)” (JTA)	2023 2026	「Thailand Good Travel Mark」(GSTC compliant) announced

MALAYSIA

1996 : “National Ecotourism Plan” established
 2016 : “National Ecotourism Plan 2016-2025” established
 2020 : “Malaysia National Tourism 2020-2030” (Malaysia government)
 Note : The DMO system is not necessarily well developed.

Why this Research was conducted

- Sustainable tourism and human exchange are inseparably linked to climate change, regional decline, and overtourism.
- While airlines are among the entities that have the greatest impact on tourism and human exchange, they have also come to be strongly recognized for their negative aspects, such as CO₂ emissions and the promotion of tourism concentration.
- Internationally, ESG management, the SDGs, and sustainable tourism standards such as GSTC have been emphasized, and airlines are now expected to play roles that go beyond simply transporting visitors.
- Airlines are unique in that they directly connect large numbers of passengers from major cities with regional areas within the country, and are also responsible for international transportation between countries. Therefore, we decided to research how they can utilize this characteristic to contribute to sustainable tourism regional management.
- Against this background, this research began with the question: “How can airlines contribute to sustainable tourism and destination development?”

Seven Issues Related to Sustainable Tourism and Human Exchange

In the research study “Sustainable Tourism and Human Exchange in Japan and ASEAN,” conducted from 2024 to 2025, the following seven issues are used as key themes.

As a related study, research including interviews with the sustainability departments of three airlines was conducted.

- Concentration and dispersion of visitors
- Capacity management of destinations
- Visitor behavior and responsible conduct
- Value-added products and regional development
- Human resource development and skills
- Destination management
- Risk mitigation

Airlines	Interviewee
ALL NIPPON AIRWAYS (ANA)	ANA Strategic Research Institute
JAPAN AIRLINES (JAL)	Japan Airlines Solution Sales Headquarters
MALAYSIA AVIATION GROUP (MAG)	Malaysia Aviation Group Sustainability

- Accelerated ESG management in response to the COVID-19 pandemic
- Launched "ANA Future Promise" in 2021, integrating environmental, social, and economic value creation
- ANA Research Institute joined Destinations International (DI) in 2023, implementing "DestinationNEXT" to support data-driven evaluation and consensus building in DMOs
- Positioned "Regional and Destination Management" as a core mission of the ANA Group

- Utilization of “**Destination NEXT**”

⇒ Analysis and visualization of the current state, strengths, degree of collaboration, and challenges of DMOs

⇒ Enhancing feasibility by using advanced overseas DMO case studies

- Rather than promotional support, emphasis is placed on contributing to destination management.

“Awareness of being on the same boat as the region.”

★ Ultimate objective: **Improving Residents' Quality of Life (QOL)**

(Do citizens feel that their lives have improved through regional management?)

★ Key to solving issues:

All members of the region must not treat tourism as someone else's problem. Directly confirm and visualize residents' sentiments toward tourism and build consensus on crisis awareness and future vision through full participation.

Initiatives with the “Kita-Hokkaido DMO” (2023–2024)

The ANA Research Institute implemented initiatives aimed at enhancing and achieving self-reliance in destination development together with the tourism region “Northern Soya area”, utilizing **Destination NEXT**.

① Visualization of the DMO’s condition

⇒Voices of the local community / listing of tourism resources

Online surveys and workshops were conducted for local governments, tourism operators, educational institutions, and residents. By extracting “strengths” as a destination and understanding the status of collaboration and consensus-building within the region, it became easier to form a shared understanding among stakeholders.

② Specification and shared recognition of challenges

⇒Community involvement and awareness

Workshop-style meetings connecting Wakkanai City, Rishiri Town, Rebun Town, Rishirifuji Town, and online participants were held to share survey analysis results and foster discussion.

③ Development of strategies for specific improvement points

⇒Sustainable destination management

Based on transportation access, securing and educating labor, the need for year-round tourism and activity offerings, and the creation of tourism opportunities regardless of day or night (dining, experiential offerings), specific improvement points were identified, discussed, and strategies formulated.

ANA Case Study

④ Work Experience Program: Japan's Northernmost Working Trip in Winter Feb.2025

This regional contribution program was realized through a collaboration between the Wakkanai Tourism Revitalization Promotion Council, ANA Research Institute, and Waseda University. In this project, students stay in the North Soya area for two weeks, aiming to expand the "relational population" (kankei jinko) through work experience. By establishing a system where compensation for the work experience is paid in local currency and fully consumed during their stay, the program creates an environmental impact that contributes to both maximizing tourism spending and revitalizing the local economy.

- ⇒ Provision of diverse experiences and resident participation
- ⇒ Stabilization and improvement of regional income



就労体験 (大規模草地)



就労体験 (水産加工)

自由行動時には地域商品券を利用して、冬の北宗谷（稚内・礼文島）ならではのスノーアクティビティ等に参加し、地域での生活や交流も楽しみました。



「カーリング」体験



「バナナボード」体験

Source : ANA Research Institute website

- Management reconstruction and V-shaped recovery following the 2010 bankruptcy.
- Vision during and after the COVID-19 pandemic (business diversification).
- In 2021, ESG (environment, society, governance) was positioned as the management axis, with “coexistence with regions” and “creation of relational connections” identified as the most important factors for business continuity.
- In 2023, JAL became the only airline to join GSTC(✕) and began DMO support based on global standards (GSTC). ✕Global Sustainable Tourism Council

- Direct collaboration with DMOs

Continuous engagement including the dispatch and secondment of human resources to regions

A proactive stance as a co-creator, with a future-oriented approach

- Utilization and dissemination of international standards (**GSTC**)

★ Ultimate objective:

Residents feel Happiness and Wellbeing through regional management based on sustainable tourism

⇒ Key to new value creation:

Support for obtaining international standard (**GSTC**) certification to realize regions where both visitors and residents feel happy.

Essential element: Integration with hospitality

Co-creation model for Yoron Island, Kagoshima (2024~2025)

JAL and JAC (Japan Air Commuter) signed a memorandum of understanding (MOU) with Yoron Town regarding sustainable tourism promotion and launched comprehensive support, including support for GSTC certification acquisition by accommodation operators, development of travel products contributing to sustainable tourism, and introduction of funding mechanisms.

① Attracting responsible visitors ⇒ Community support and resident participation

“TABI Academy”: A program to learn the way of life from island residents who enrich the community with protecting daily life

“Strengthening diversity response”: Inbound response enhancement (improved access, multilingual support), Barrier-free enhancement (inclusive facilities, services, and information)

② Practical support for regions and businesses ⇒ Sustainability standards

“GSTC certification support”: Comprehensive support including training JAL employees as GSTC auditors and consulting services

“GSTC destination certification or award support”: Dissemination of guidelines, support for accommodations

③ Securing stable financial resources

⇒ Stabilization and improvement of regional income, fair distribution across the region

“Destination-based tax donation”: Institutionalization, expansion of participating stores, and support for electronic vouchers

“Accommodation tax consideration”: Support for policy design, introduction examination, and DX of tax collection



④ TABI Academy: “Learning Coastal Village Culture from an Island Living with the Starry Sky”

Yoron Island actively works to balance tourism promotion and environmental conservation and has been selected as one of the Top 100 Sustainable Destinations.

To preserve and pass on the island’s nature and culture, the community is collectively engaged in obtaining Japan’s first GSTC destination certification, securing tourism funding, and promoting tourism DX, striving to foster residents’ pride in their island.

<Contents of the Academy> ⇒ Visitor behavior, protection of precious natural resources, cultural exchange

Day 1: Learn the history, culture, and daily life of Yoron Island and deepen exchanges with residents.

Day 2: Participate in beach-cleaning volunteer activity “Unjami,” upcycling experience, and planting experience for red-soil runoff prevention.

Day 3: Share island life experiences among participants.

Learn, experience, and share various sustainable initiatives such as cultural transmission and environmental conservation for the history and future of Yoron Island.



砂浜のゴミ拾い



アップサイクル



サンゴ保全(リーフチェック)

- “National Tourism Policy 2020–2030” (Malaysia)
- Malaysia Airline Group (MAG) established a group-wide sustainability division in 2022.
- The environmental domain is given top priority, with firm on-site implementation toward Net Zero by 2050.
- Active intervention toward passengers and markets (product- and demand-driven).
Rather than direct involvement in destination management, MAG focuses on designs that indirectly contribute to regional sustainability through travelers’ choices and product design.
- In accordance with a policy to avoid “greenwashing,” external communications are restrained, and efforts focus on product and operational improvements.

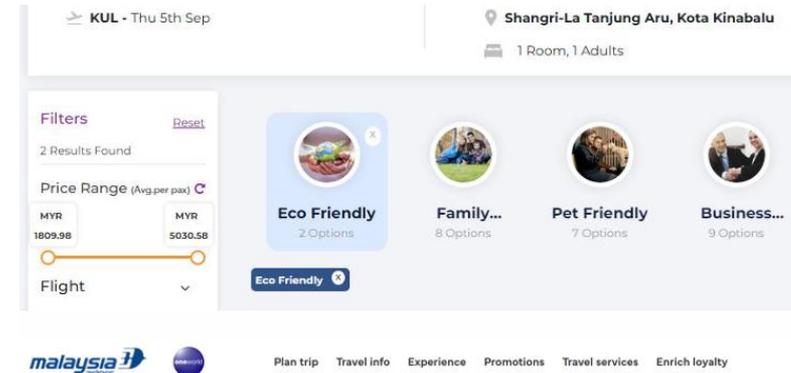
MAG Case Study

Focusing on the growth and expansion of travelers' "Sustainable Preferences" and creating demand

① Visualization of sustainable accommodations utilizing the e-commerce platform "Journify"

(icon display and disclosure of initiatives)

⇒ Minimization of negative environmental impact



② "ALUNAN CORAL PROJECT"

In-flight sales developed through collaboration with regional resorts via the loyalty division (Enrich) to protect local culture and traditions

⇒ Support for local businesses and fair trade

③ Donation of 10% of sales from ② to coral reef conservation

⇒ Protection of tourism resources



Three Airlines' different Contributions (Summary)

	ANA	JAL	MAG
How to interact with Local Community (DMO)	Supporting local sustainability from within. (Supply-based initiatives) “Accompanying design and implementation”	Supporting local sustainability from within. (Supply-based initiatives) “Direct involvement and operational support”	Supporting local sustainability from the outside (Demand-based initiatives) “Promoting Sustainable Tourism”
Specific ways to contribute	Supporting DMOs by utilizing methods as a DI member airline (including examples of leading overseas DMOs) Continuous support rooted in the local community for sustainable DMO management (with staffing provided as needed) Case of “Kita Hokkaido DMO” → Listen to the voices of the local community → Visualize DMO status → Community involvement and awareness → Sustainable tourism destination strategy and management → “Work experience Program” (Providing diverse experiences, resident participation, stabilizing and improving local income)	Support DMO's using international Standards as a GSTC member airline (including support for obtaining approval) Participate in ongoing DMO management to achieve the DMO's goals (with temporary staffing provided as needed) Case study of “Yoron Island Co-creation in Kagoshima” → Attracting visitors responsibly → Global Sustainability Standards (GSTC) → Stabilizing and fair distribution of local income → Natural resource conservation and cultural exchange → Travelers' behavior	Product development and expansion that captures demand-side needs, without being limited by local community management Involvement in local sustainability (eliminating greenwashing) Providing opportunities for passengers to participate in sustainable tourism by actively utilizing e-commerce and reservation systems “Vitalization of Sustainable Accommodations” → Minimizing negative impact on the environment “ALUNAN CORAL PROJECT” → Support for local business and fair trade
DMO system	YES : National DMO system	YES : National DMO system	NO DMO system

Sence of Crisis among Japanese Airlines

- Japan's population has entered a phase of decline in recent years.

September **2025**

Total population = **123.2 million**

Aging rate (65 years and older) = **29.4%**

Projected **2070**

Total population < **90 million**

Aging rate (65 years and older) ≐ **39%**

- Population decline, concentration in urban areas, aging, increase in marginal settlements, and growing risk of loss of Japan's unique resources and culture



Risk of reduced or suspended Airline routes

Challenges for Airlines and Destinations

Have the effects of Airline initiatives been verified?

- While airline initiatives have increased in recent years, what is important is whether these initiatives effectively enhance regional sustainability.
- Corporate KPIs (ESG evaluation, brand value) and regional KPIs (residents' QOL, regional economic circulation) must be aligned.
- For future airline initiatives, “how they are incorporated into destination’s decision-making” will be critical.

Are there missing perspectives or issues on the Destination side?

- Viewing sustainable tourism as a means of destination management and strengthening the decision-making and strategic design capabilities of DMOs and local governments are considered key regional challenges.
- The key lies in “how to incorporate airlines into the framework of destination management.”

Proposals for future Airlines for Sustainable Tourism and Destination Management

Local Community (DMO may be functioning)

↑↑↑

Airline

① Further expansion of existing initiatives by some airlines

✈ **Visionary Shift:**

From a "Guest-Sending Industry" to a Community-Based "Destination Development Infrastructure"

✈ **Management & Organizational Support:**

Solving regional issues and supporting decision-making through MOUs and talent secondment

✈ **Implementation of International Standards:**

Promoting sustainable tourism destination management based on global indices (e.g., GSTC)

✈ **Creation of "Relational Population":**

Developing experiences that foster local pride and building exchange networks connecting Cities and Regions in a country, and domestic and international stakeholders between countries.

✈ **Data Strategy:**

High-precision inbound marketing leveraging proprietary data such as IATA DDS

✈ **Enhancement of Communication Power:**

Transforming owned media (including in-flight and booking systems) into a platform for communicating regional value

② New potential contributions proposed for Airlines

✈ Application of "CRM (Crew Resource Management) Skills" to Organizational Development

Enhancing the quality of consensus building and the resilience (adaptation, recovery, and growth) of local community organizations.

Cultivating internal CRM facilitators to ensure sustainable organizational growth.

⇒ **Optimization of Multi-Stakeholder Collaboration :**

By applying CRM concepts, establish a framework where government, corporations, and residents make decisions as "one team."

⇒ **Fostering Psychological Safety :**

Introduce "non-technical skills" to improve the quality of consensus building through dialogue that transcends social hierarchy and positions.

⇒ **Strengthening Resilience :**

Embed a non-punitive "learning culture" to foster a resilient organizational climate that continuously learns from errors and pursues improvement.

ขอบคุณที่รับฟังครับ

Thank you for your attention.

ご清聴ありがとうございました。