

Changes Surrounding Tourism in the Post COVID-19 and Japan's Tourism Policy

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1 History of Japan-Thailand Exchange

2 Impact of COVID-19 on Tourism

(1) Impact on Japan-Thailand traffic

(2) Impact on the Japanese tourism market

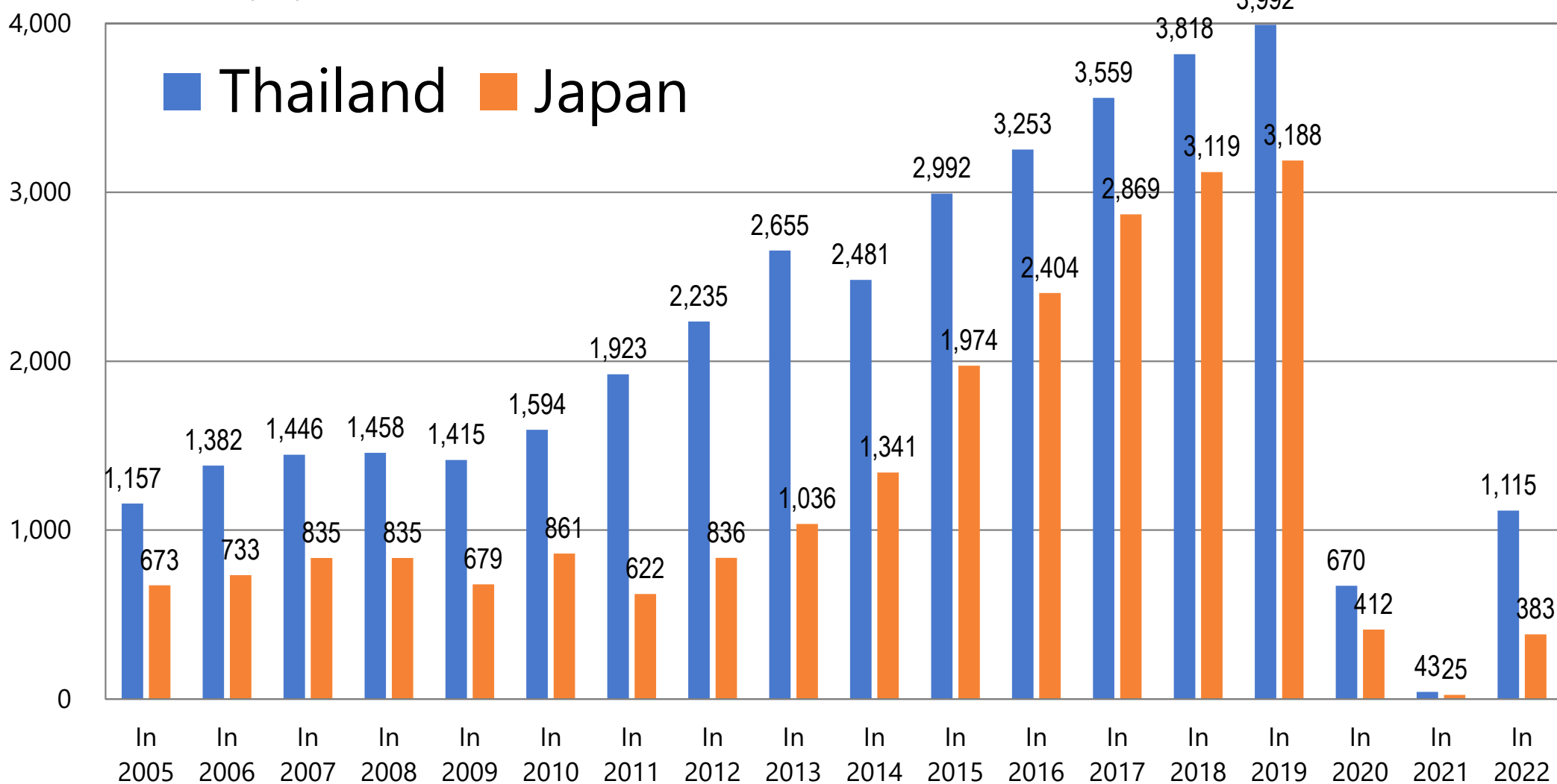
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Number of foreign visitors to Thailand / Japan (since 2005)

○ Japan and Thailand are both focusing on inbound tourism, and the number of foreign visitors to Japan / Thailand has been steadily increasing.

(Ten thousand people)

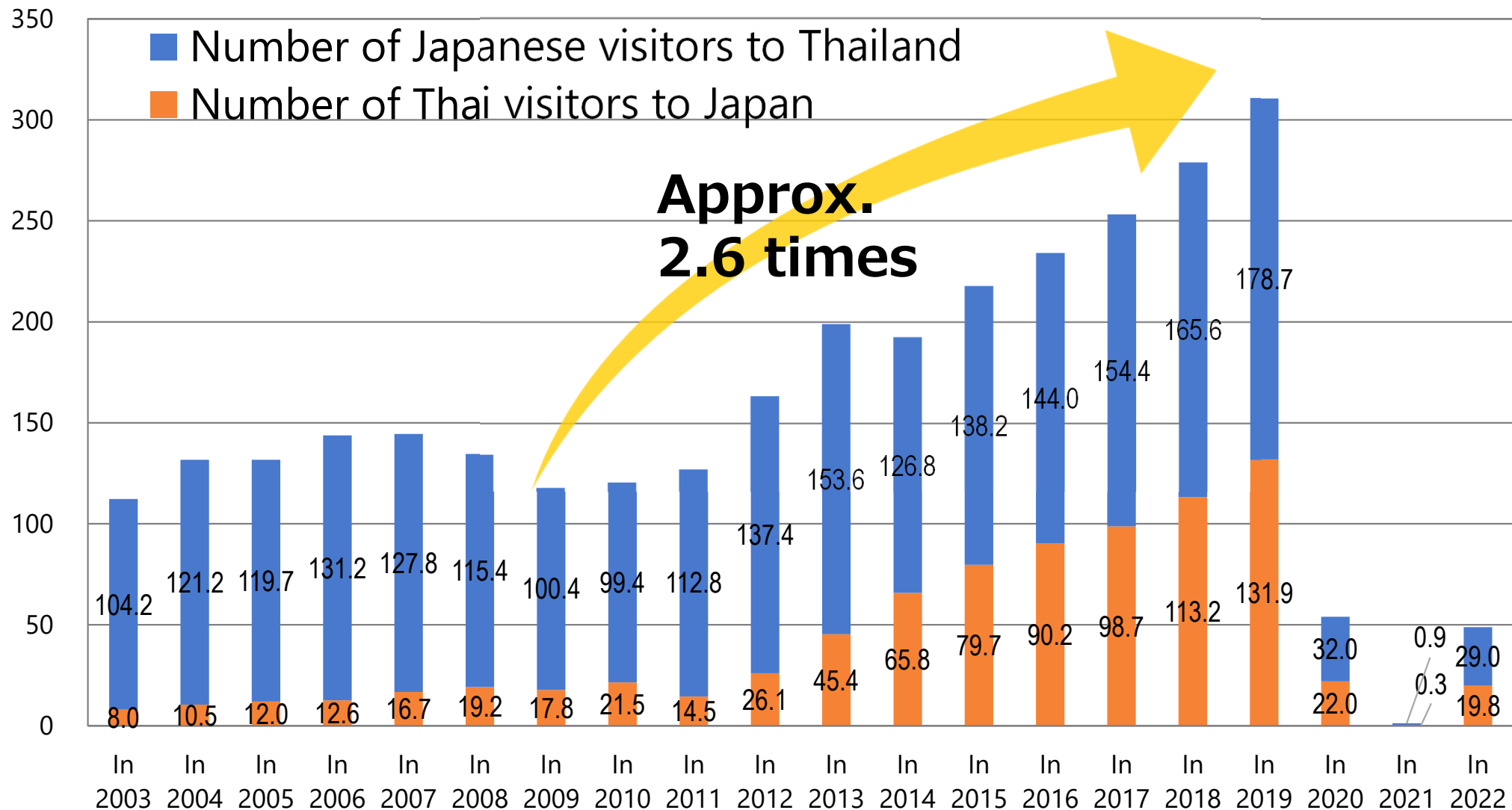


(Source) : Thailand: Ministry of Tourism and Sports; Japan: Japan National Tourism Organization

Changes in the number of people-to-people visits and exchanges between Japan and Thailand (since 2003)

- The traffic between Japan and Thailand is growing steadily, increasing about 2.6 times during the 10-year period from 2009 to 2019.

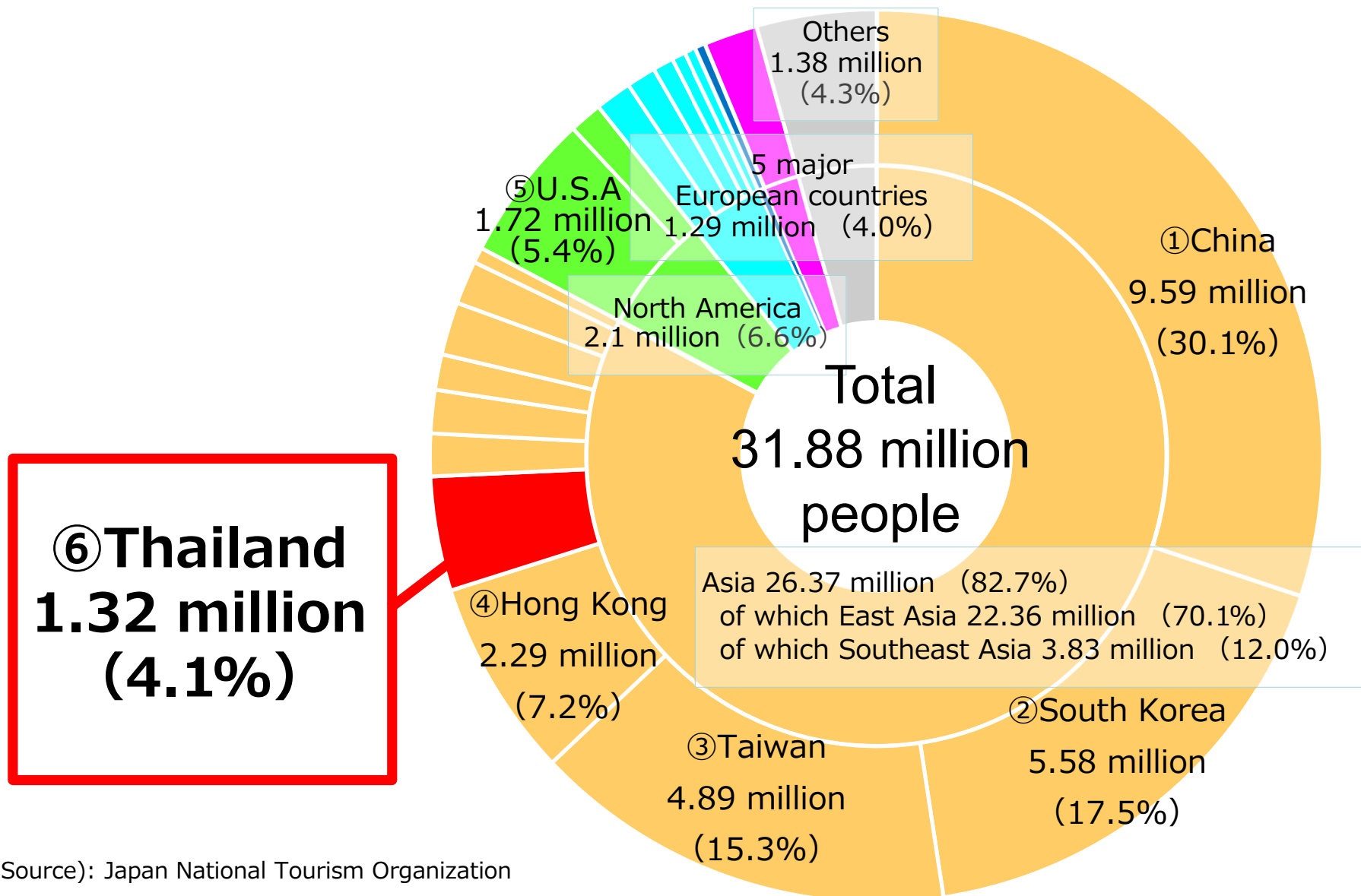
(Ten thousand people)



(Source: Thailand: Ministry of Tourism and Sports; Japan: Japan National Tourism Organization)

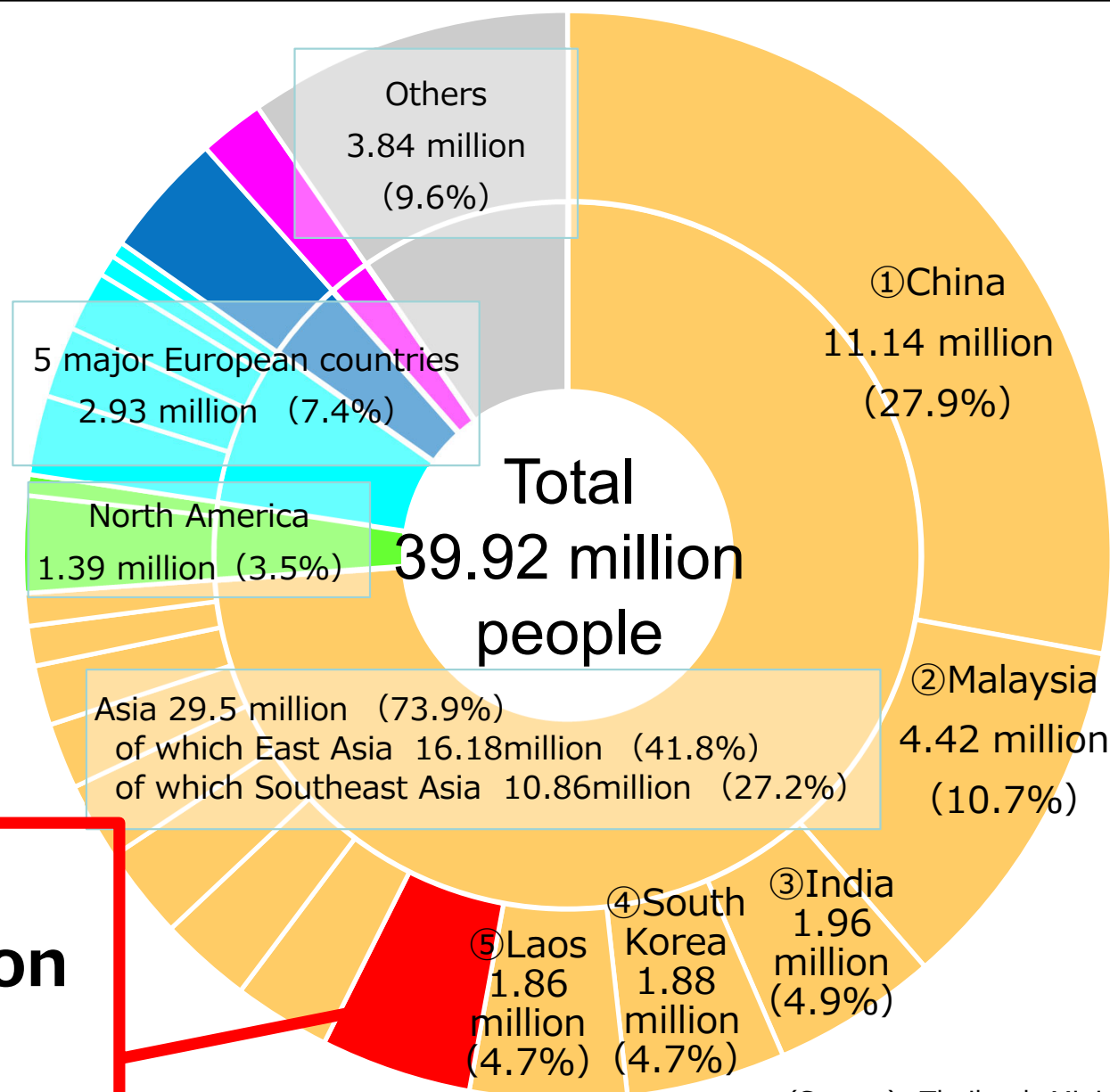
Number and Percentage of Foreign Visitors to Japan [by Country/Region] (2019)

- According to the number of foreign visitors to Japan by country/region, Thailand is a very important market, ranking 6th with 1.32 million visitors.



Number and percentage of foreign visitors to Thailand [by country/region] (2019)

- According to the number of foreign visitors to Thailand by country/region, Japan ranks 6th with 1.79 million visitors.



⑥ Japan
1.79 million
(4.5%)

Japan-Thailand Tourism Seminar

Attendees

Prime Minister Kishida, Commissioner Wada of the Japan Tourism Agency, and other Japanese tourism officials

Minister of Tourism and Sports Phiphat, Tourism Authority of Thailand

President Yuthasak, and other Thai tourism officials.

Total number of the participants : 220

Others

- 96% of participants surveyed were "satisfied"
- 15 bottles of "Kamoizumi" (Japanese sake) ran out during the reception



Breaking open a ceremonial sake barrel



Greetings from the Prime Minister



Prime Minister and Minister Phiphat shaking hands

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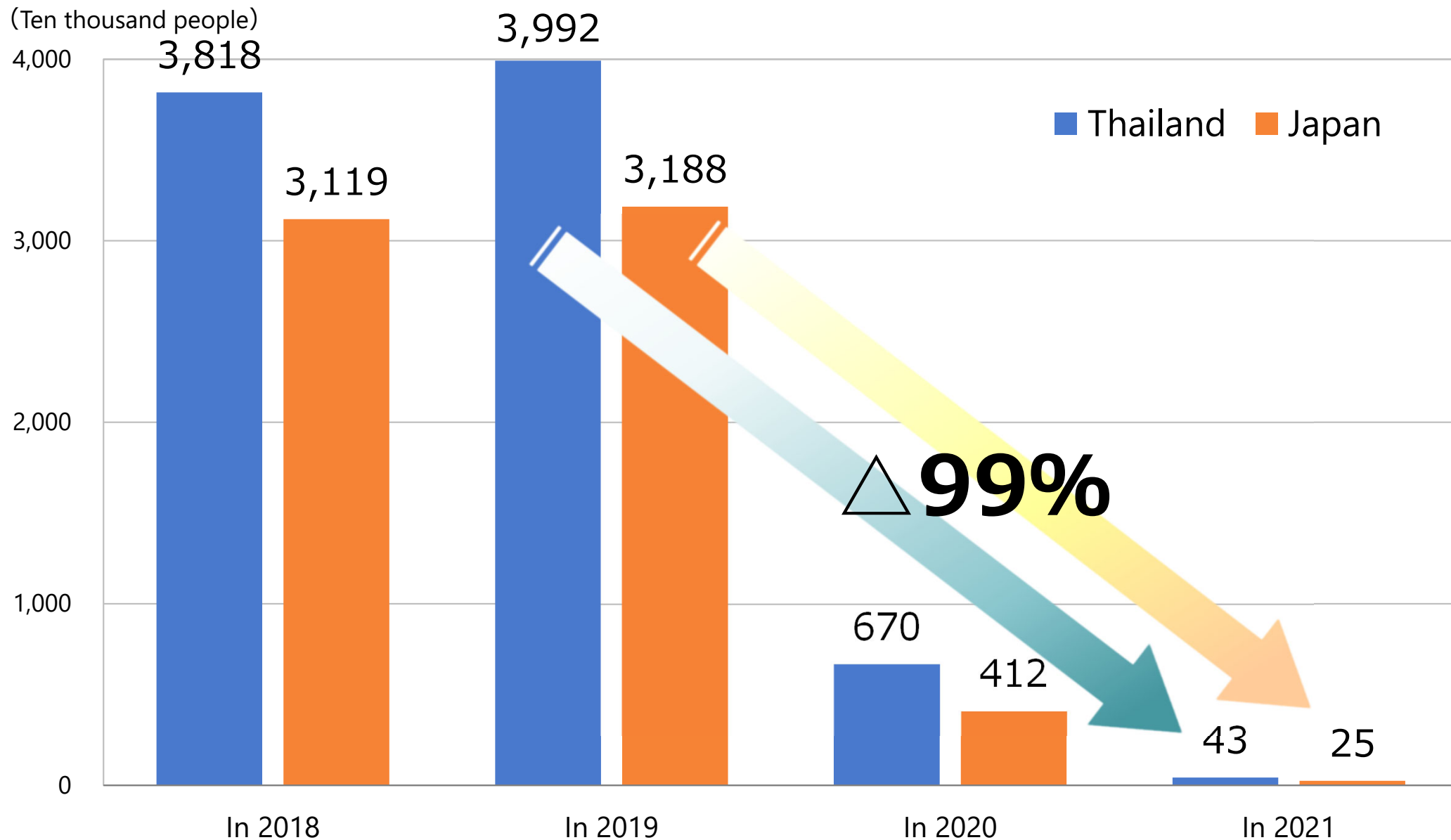
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Impact of COVID-19 (number of visitors to Thailand / Japan) 国土交通省

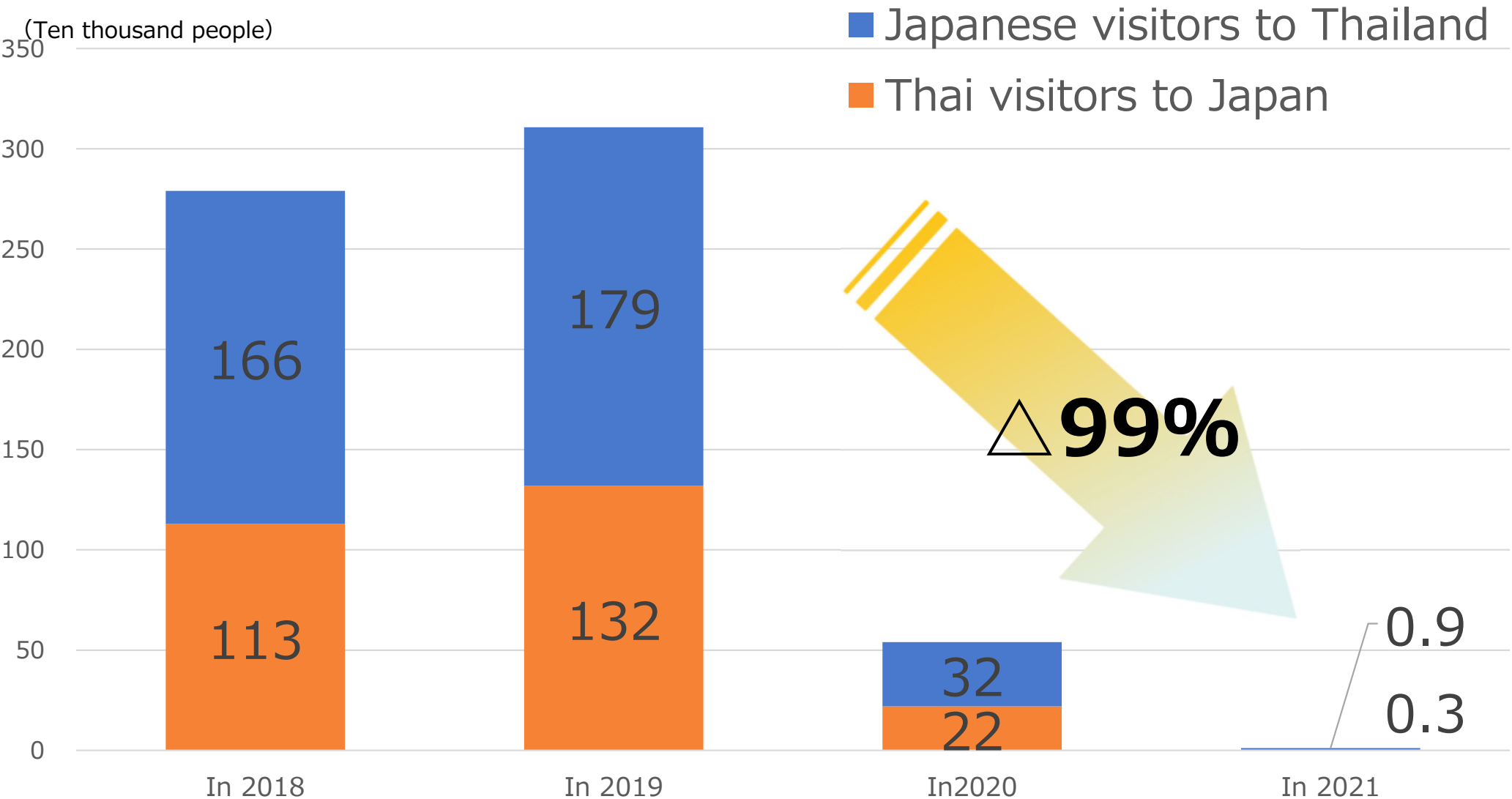
- The number of foreign visitors to both Thailand and Japan declined significantly. In 2021, the number minus 99% compared to 2019.



(Source: Thailand: Ministry of Tourism and Sports; Japan: Japan National Tourism Organization)

Impact of COVID-19 (Japan-Thailand traffic)

○ Due to the impact of COVID-19, traffic between Japan and Thailand minus 99% in 2021 compared to 2019.



(Source: Thailand: Ministry of Tourism and Sports; Japan: Japan National Tourism Organization)

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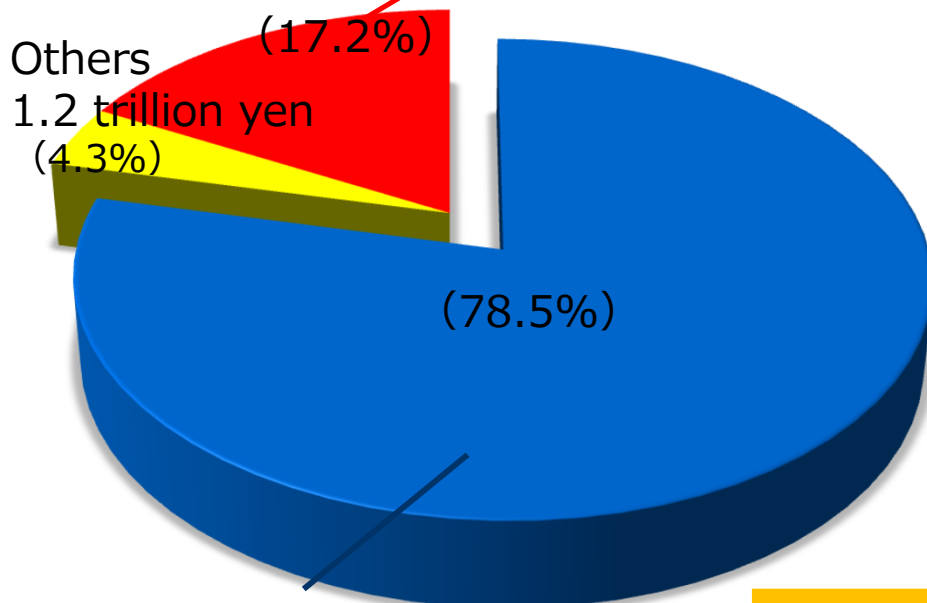
4 Conclusion

Impact on Japanese Travel Consumption

- Due to the impact of COVID-19, Japanese travel consumption has also shrunk significantly.
- Comparing travel consumption in 2019 and 2021, Japanese domestic travel is minus 10 trillion yen and inbound travel is minus 5 trillion yen.

**2019 (1st year of Reiwa) :
27.9 trillion yen**

**Inbound travel
4.8 trillion yen**

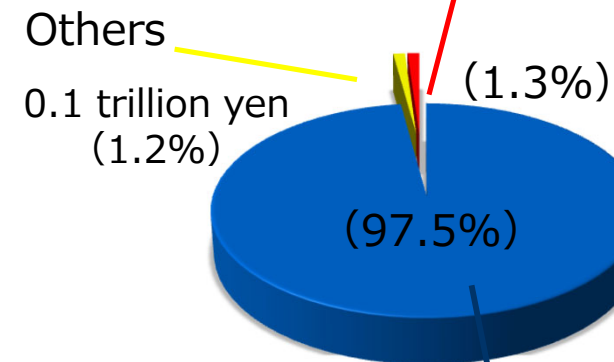


**Japanese domestic travel
21.9 trillion yen**

▲Approx. 5 trillion yen

**2021 (3rd year of Reiwa):
9.4 trillion yen**

**Inbound travel
0.1 trillion yen**



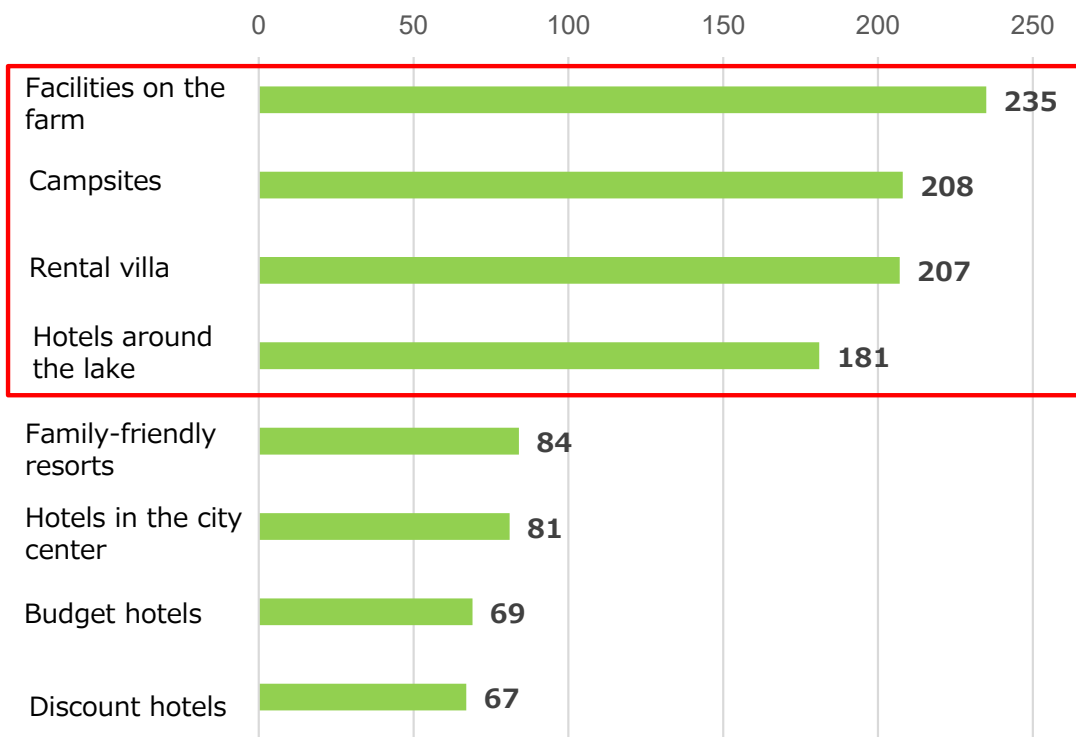
**Japanese domestic travel
9.2 trillion yen**

▲Over 10 trillion yen

Growing interest in outdoor activities

- COVID-19 brought about a change in travelers' preferences. Interest in outdoor activities that avoid the crowding of large numbers of people increased.

Number of hotel searches on Tripadvisor(index vs. previous year)



Glamping



Outdoor activities

*Search for accommodations such as campgrounds and rental villas has increased compared to before COVID-19
 Source: Tripadvisor, beyond COVID-19: The Road to Recovery for the Travel Industry (2020/5)

Growing Interest in “Sustainable Tourism”

- The trend has been strong where interest in "sustainable tourism" had been growing even before the COVID-19 epidemic.



- World travelers who say “the **pandemic** has made them want to travel more **sustainably** now”: 71%
(10% increase from the 2021 survey)

Source: Booking.com "Sustainable Travel Report 2022" (June 2022)

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- Paying particular attention to the three keywords of "sustainable tourism," "increase in consumption," and "promotion of regional visitors," the following three strategies will be promoted comprehensively and cooperatively.

Strategies for creating high value-added and sustainable tourism regions

Inbound Recovery Strategies

Strategies for Expanding Domestic Travel

○ **Creating a sustainable tourism destination**

Building a leading model that balances the preservation of nature and culture with the promotion of tourism

○ **Revitalization and high value-adding of tourism attractions and tourism industry**

Renovation of lodging facilities, etc., removal of abandoned buildings, and wide-ranging DX of tourist attractions



Major renovation of accommodations



Removal of abandoned buildings

- **Creation of special experience content that will serve as a trigger for inbound recovery**

Tourism Restart Project



Courtesy of Iriomote Wildlife Conservation Center,
Ministry of the Environment

- **Creation of high value-added inbound tourism destinations in regional areas**



- **Implementation of measures to stimulate tourism demand**
“National Travel Support Program”
- **Development of new markets**
Promotion of workcation and universal tourism



The Master Plan for the Promotion of Tourism Nation

- The “Master Plan for the Promotion of Tourism Nation” is a basic plan regarding the realization of a tourism nation. A new plan has been under study since last fall.
- A new plan will be formulated by the end of March this year.

Strategies for Creating Sustainable Tourism Regions

Number of regions committed to sustainable tourism
(newly established)

(In 2022)

12 regions
(including 6 regions with international certifications and awards)

Year 2025 (Draft)

100 regions
(50 regions with international certifications and awards)
(Significant increase, nationwide expansion)

Inbound Recovery Strategies

Unit spending on inbound travel
(new index)

(In 2019)

159,000 yen/person

200,000 yen/person
(25% increase in 2019)

Goals to be achieved early

Travel Consumption 5 trillion yen

Strategies to Expand Domestic Exchange

Domestic Travel Consumption

21.9 trillion yen

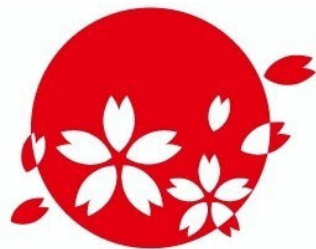
22 trillion yen
(ahead of 2030 target)

Goals to be achieved early

20 trillion yen

Conclusion

- Although the tourism industry was hit hard by COVID-19, it was an opportunity to rethink tourism to date.
- Japan is working on “expansion of domestic travel ” and “inbound recovery” with creating “high value-added and sustainable tourism regions”.
- Japan and Thailand have been actively working on inbound tourism. Exchange between Japan and Thailand continues to expand in both directions.
- Tourism is not only an economic benefit, but also a wonderful opportunity to accelerate mutual understanding between the two countries at the citizen level. As the importance of world peace is being reaffirmed, we should promote tourism in both countries more than ever.



Japan. Endless Discovery.