

山口大学大学院東アジア研究科
博士論文

**Inbound tourism development and host environment for
foreign tourists in heritage destinations of Japan, the
case study of Tsuwano**

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1. Introduction

Tourism has been an essential part of Japan's culture from the early Edo-period, with the "Sankin-kōtai" or "alternate attendance" as one of the leading forces behind tourism developments. The different roads going to the capital of Edo (current Tokyo) were lined with post towns, catering to the needs of domain lords and their large entourage. The other form of tourism was connected to religion, pilgrimage being one of the few exceptions of travel that a wide part of the society could experience (Guichard-Anguis & Moon, 2008).

A travel pattern similar to pilgrimages could be seen in Japan in the second half of the 20th century, a time when several campaigns were focusing on furusato (hometown) tourism or traditional townscape tourism (Mori, 2007). The rural destinations that were "discovered" by these campaigns experienced fast-paced growth in tourism numbers, which helped their development into well-known heritage destinations, and supported their economy. While the destinations flourished for a period of time, a slow decline started, which prompted several research papers on the analysis of the different development phases of destinations (Kurosawa, Soshiroda, & Tsutsumi, 2013). Funck, referring to her previous article wrote that "the highly predictable domestic market of the 1960s and 1970s was replaced by a more individualistic one in the 1980s and 1990s" (Funck, 2012, p. 125). This prompted some destinations to diversify source markets, a "key factor to continuously rejuvenate a destination" (Funck, 2012, p. 145).

The framework often used is that of the Tourism Area Life Cycle model from Butler 1980 (Butler, 2011), with five stages defined. The first one is "Exploration", followed by "Involvement", "Development", "Consolidation" and "Stagnation". In the case of these tourism-boom destinations, the "Involvement" and "Development" stages occurred in a very fast manner, as the rise of popularity and the brand was strengthened by national magazines like the Anan-zoku phenomenon (Mori, 2007) and campaigns from the National Japan Railway (Kikuchi, 2004).

The difficulty that most of these destinations face is that after the

“Consolidation” a prolonged “Stagnation” starts. The community of the destination has transformed by this time, as tourism became an essential part of the local economy and identity, especially in rural Japan, where other industries slowly shrink. After this period, the next stage can be either rejuvenation or decline, depending on the innovation capabilities and attitude of the local private and public sector, but with Japan’s shrinking population, inbound tourism is one of the most crucial innovation targets.

Formed partly by policies such as easing of visa regulations for Asian countries, the patterns of inbound tourism changed immensely in the past decades. There is a substantial shift in sending markets, with Asian countries making up most of the incoming tourists in the past few years. Although there are differences between the tourists based on their cultural background, some basic needs and difficulties experienced in Japan are similar. It is necessary for the destinations to innovate and create an environment that welcomes the foreigners and makes them feel safe, reduces possible problems like the language barrier and emphasizes both *omotenashi* (Japanese hospitality) and induces some form of consumption.

This thesis concentrates on Tsuwano, a rural castle town that experienced the aforementioned sudden domestic tourism boom in the 1970s, but failed to recognise the importance of inbound tourism, and the necessity to develop towards foreign sending markets. Through this research, the author aims to understand the underlying reasons why there is a stark difference between successful and unsuccessful destinations, and what elements of inbound development have been attempted at these destinations.

Tsuwano is analysed from several aspects, namely tourist environment, stakeholder attitude and non-private sector tourism development (local authorities and tourism association). After a literature review of successful destinations and development methods, a survey is conducted in Tsuwano and reference destinations on the previously mentioned foreign-friendly environment of restaurants and accommodations. The welcoming environment is one crucial aspect of a thriving inbound destination, but more important than that is the attitude of the tourism industry stakeholders towards the concept of inbound

tourism (and tourists). The survey of accommodations is also concentrating on what the establish management is concerned about and what general attitude they have towards accepting foreigners. Finally, the third necessary ingredient to a successful inbound destination development is the work of the local authorities and the tourism associations and their strategic planning.

The result of these inbound tourism development components analysis in Tsuwano is that while the town hall is successfully developing a heritage brand for the destination through national and international designations (non-private destination development), and the number of multilingual menus are the highest in the surveyed destinations (tourist environment), the attitude of the tourism associations and local tourism industry members lack the motivation to make the necessary steps.

2. Inbound destination development and tourist environment

This paper aims to understand the background of successful inbound tourism destinations and analyze Tsuwano as a case study of destination that struggles and has not yet tapped into the inbound market.

Through the literature review of recent inbound tourism academia, the underlying reasons for success and struggle of destinations are introduced, to paint a more detailed picture of what the industry is facing.

Further research results are shown how rural destinations struggle for resources, especially workforce. The impact of the ageing society and the workforce market deficit is discussed through case studies and government survey results.

Another element required for inbound success, the tourist's environment and dissatisfaction with it are shown through the government's satisfaction surveys. The linguistic landscape, communication difficulties and other environmental factor are taken into account, as a required element of good travel experience.

Finally, the Tourism Area LifeCycle is introduced as a tool to compare and further assess the situations of a destination, and the phase of development it is situated in.

The components create a framework, which is used to analyze the case study, Tsuwano and its struggle to avoid decline.

2.1. Analysis of Tsuwano and reference destinations

Two surveys are detailed which were conducted in Tsuwano and the reference destinations, aiming to find the underlying difference that can cause the success or fall of a destination. The targets of the survey are restaurants and accommodations, two key elements of the travel experience. The survey concentrates on foreign tourists' environment and the management's attitude towards inbound tourism, as well as difficulties the establishments face in general and connected to inbound tourism.

Tsuwano is described in detail, with a thorough introduction into the tourism resources that can be the base of a successful inbound tourism strategy, as well

as an introduction into the activity of the local authorities and the difficulty of realizing declining tourism number due to “inaccurate” tourism statistics.

Finally, an interview of the local authorities and tourism association is detailed, shedding light on the destination development strategy (or lack of it) and the attitude of both public and private sector

3. Literature review

3.1. Inbound tourism-oriented literature review

Inbound tourism and its many aspects have been in the focal point of tourism research in Japan recently, as a reaction to the growing number of foreign tourists. This paper is part of this trend, although showcasing a rural destination that did not achieve the needed change, to attract inbound tourists.

A large number of research papers and surveys focus on successful destinations, the expectation and satisfaction of foreign tourists as well as overtourism (Kerr, 2019), a problem that recently made headlines in such hot-spots as Kyoto (Hijino, 2020) (Chavez, 2019) and Osaka (White, 2019)).

Case studies are focusing on success stories, such as Takayama, Niseko, Hakuba and Hakone, some of which are connected to winter sports. The reasons and strategy of these destinations are investigated in an attempt to generalize and replicate in other places, with varying results.

Accommodation is a keyword of some recent studies connected to the inbound tourism, as these establishments are in the core centre of a travel to a foreign country, and in some cases an important part of the experience. This sector has difficulties not just in adapting to the new challenges that they are facing with the growing stream of foreign tourists, but also reacting to a deep structural problem that is widespread and fundamental in Japan's society, namely the ageing population.

3.1.1. Takayama

Takayama has been considered in the tourism research field of Japan as an example of success in developing an inbound destination thus it has been the topic of many research papers. Carolin Funck has written in details on the innovation that Takayama has achieved (Funck, 2012). Some of these innovations in the destinations are the multilingual signs and information across the city, and a positive attitude towards learning foreign languages (Nihon Koutsu Kousha, 2018). The case study of Takayama has also been featured in books on inbound tourism, such as *Introduction to Inbound Tourism* by Yagasaki (Yagasaki,

2017).

The inbound policies were successful as “the development of an inbound mindset was successful” in smaller facilities, international tourists often account for more than half of all nights spent, as they make early reservations and stay for several nights” (Funck & Cooper, 2013, p. 178). The city’s orientation was acknowledged early on by the central government, by being designated as International Tourism Model District in 1986 (Funck, 2012).

Takayama’s strength is that it was able to open towards inbound tourism before other destinations, thus it was able to diversify source markets and tourists types which is “the key factor to continuously rejuvenate a destination” (Funck, 2012, p. 145).

3.1.2. Niseko and Hakuba

Niseko town in Hokkaido is often mentioned as one of the success stories of a destination that was able to tap into the inbound market. A Yamamoto (2019) explains in his article how the once prospering ski paradise Niseko started to experience a slow decline of the domestic skiing market in the late 1990s. The change came with the sudden rising numbers of Australian and western foreign tourists, which lead to an astonishing growth from 12’113 foreign guest night in 2002 to 115’783 in 2006 (Yamamoto, 2009). The popularity of the destination also attracted foreign investors which lead to an uncontrolled development phase, endangering the nostalgic atmosphere and townscape of Niseko. Onizuka in 2008 already wrote about the growing foreign capital in Niseko, stating that in 2004 there were already 10 companies established with foreign owners and management, a number which grew to 34 by 2007. These companies were directly connected to the tourism industry or indirectly through real estate and property development services targeting foreign capital (Onizuka, 2008). Yasumoto argues that the destination’s development was not an endogenous development but rather inflow of capital and business culture, which leads to intercultural differences between the stakeholders. (Yamamoto, 2009). A similar situation can be seen in Hakuba, according to a panel discussion in Hokkaido University, where there are more than 50 accommodation establishments owned

and run by foreigners. The discussion goes on that while these companies may have a better understanding of foreign markets, not entering the local tourism association creates a gap between the stakeholders of the destination (Cho, Yamada, Kobayashi, & Machino, 2016)

An earlier research points at the place attachment of stakeholders in this area, and states that while tourism, in general, has a positive effect on both tourist and the locals, this effect changes by the type of connection to the tourism industry. An example extracted from the data shows that the purpose of the visit strongly determines the strength of the attachment, showing that onsen goers are less likely to feel a strong attachment than those who visit the area for the natural and cultural value. This would also infer that ski tourists are similar in being less attached, but the data proves this generalization wrong, as the attachment value is much higher than does of the onsen-tourist (Taniguchi, Imai, Hara, & Ishida, 2012). This research shows that tourist, as well as inbound tourists, are difficult to generalize, and the need for segmentation is present in the destinations. The attitude survey also showed that while tourism is causing a sense of proudness and stronger attachment of the local to the community and the city, there is a distinctive difference what the groups of locals are looking for in the future. While those who are closely connected to the industry are hoping that the city will further develop, those who are not directly connected to the tourism industry – while supporting tourism – would like the city to stay “as it is” connection (Taniguchi, Imai, Hara, & Ishida, 2012).

The fragile community unity in a rural town or city is often stressed by the sudden change of inbound tourists, and in Niseko’s case, the rising number of foreign businesses. A recent study targeted the host-guest connection with a resident attitude survey towards Australian and Chinese tourists and businesses. The results showed that while Japanese associated some negative things with Australians, such as rising living costs, leakage and cultural friction between the differences in behaviour, they also looked at this group in a positive light, compared to the recently growing Chinese tourist groups. The Australian accommodations and other businesses also have an impact on the livelihood of Japanese managed establishments, as they are identified as a new type of

contender with comparative advantages that the locals would not be able to achieve (language and understanding of the foreign market) (Nelson & Matthews, 2017).

A crucial part of tourism development in Niseko is that it also has an endogenous development, as shown in Oshitani, Matsumoto and Fukuzawa's report. The paper concentrates on the success of the Road Side station, an entity that was mostly planned, organized and operated by locals. The paper shows the characteristics of this development and how this success might be used as know-how in other locations (Oshitani, Matsumoto, & Fukuzawa, 2018).

3.1.3. Hakone and Nikko

Another example of development and change influenced by the growing inbound tourist numbers is Hakone.

Arima (2017), in his article on the inbound development of Hakone, emphasizes the gap between tourists from different sending markets as well as the reaction of the stakeholders to the change of the landscape. One of the changes that the author of the research paper is describing is the shift from high-end and antique shops to low priced souvenir and cosmetics shops. According to Arima, this can be contributed to the decreasing number of Japanese tourist, and the difference of interest between Japanese tourists and the rising number of Asian tourists. This change has a significant impact on the townscape. The local tourism association, at the time of the article, did not address or react to the influx of foreign tourists as it seems to be concentrated around a certain establishment (Arima, 2017).

Another article by Arima et al. concentrates service offered by souvenir shops and accommodations (Arima, et al., 2014). According to their survey, 53.3% of the accommodations have multilingual websites, 66.7% have some kind of foreign language service in the establishment, and 66.7% have services to change meals according to the religious and allergy needs of foreigners. Furthermore, more than half of the accommodations employ foreigners or locals with foreign language skills. The survey continues to show that 19% of souvenir shops are employing foreigners and 31.3% of the shops have someone speaking

a foreign language. There is an asymmetry, showing that the accommodations with many foreign guests have foreign staff and foreign language speaking staff. In contrast, mostly smaller establishments are the ones that are not capable of offering multilingual services to guests.

Nose and Furuya (2008) conducted an evaluation characteristics analysis on Hakone and Nikko, and the destinations received high score in terms of tourist satisfaction. The survey conducted in the destinations with foreign tourists and domestic tourists. Two of the most valued characteristics of the destination by a foreign tourist was “communication with locals” and “experiencing rural lifestyle”, while both tourists groups appreciated the built and natural heritage scenery (Nose & Furuya, 2008). The survey highlights the importance of heritage and communication with locals as the main attraction of these destinations.

3.1.4. Endogenous development

The destinations mentioned above are different in how the tourism developed was carried out. In some cases, an established destination was able to adapt to inbound tourism while in other destinations, capital and management from outside turned a small town into a resort. The importance of the development method may mean its sustainability.

According to Yasumoto (2015), the reasons why local communities turn toward tourism, is that tourism seems to be a possible way to rejuvenate their industry, and the local community (authorities and residents) can be the main driving force and decision-makers. The needed tourism resources are mostly available in the community, and the tourism industry functions as an export of the community. The difficulty with this approach is that often stakeholders in small rural communities lack the skills for reaching the target market to disseminate information of the destination and they lack the “eye of the tourist”. This outsider’s perspective is essential for discovering and developing assets which are common for locals, but interesting for tourists. Yasumoto also argues that intrinsic or endogenous destination development is a neglected research area in the Japanese tourism academic society (Yasumoto, 2015).

The case studies mentioned above have both exogenous developments. Although the pressure comes from outside of the destinations, either in early stage as a need to address the prospects of declining domestic tourists (such as in Takayama), or in a later stage as a direct impact of a large number of foreign tourists coming to a destination (Niseko, Hakuba and Hakone).

The result and attitude towards inbound tourism may vary based on whether it was a community decision to open towards foreign tourists (Takayama), the local government's push for economic rejuvenation or development from outside of the community (domestic or foreign). Takayama's endogenous development resulted in business owners organizing language courses for themselves and their employees, while in Hakone's case there are foreign language speaking employees and foreign employees, but the management is not aiming to learn the needed skill.

3.2. Tourist satisfaction: expectations and difficulties

3.2.1. The expectations and difficulties

Foreign tourists all plan a trip with a set of expectations, influenced by many factors, such as cultural background, age-group, their perception of the destination country and their research during the planning process. Measuring these expectations is done through surveys, interview and questionnaire sheets, directly asking the foreign tourists about their experience.

Japanese cuisine and traditions, with a bit of shopping

A survey carried out by JTB in 2010 shows that the three experiences the foreign tourists were looking forward to, were "Japanese cuisine" selected by 64% of respondents, followed by "shopping" and "thermal baths" with 51.6% and 45% respectively (JTB, 2011).

	Sum	USA	Mainland China	Korean	...
Japanese cuisine	64.0%	54.1%	66.4%	55.0%	
Shopping	51.6%	13.5%	70.1%	40.5%	
Onsen Thermal bath	45.0%	10.8%	69.2%	47.7%	
Nature and rice paddies	40.5%	45.9%	27.1%	45.0%	
Bustling shopping streets	35.2%	48.6%	28.0%	37.8%	
Traditional scenery	34.9%	59.5%	19.6%	33.0%	
Experiencing tradition	19.8%	35.1%	6.5%	27.0%	
...					

Table 1: Expectations toward the trip to Japan, compiled by the author (JTB, 2011)

These expectations are different based on the tourists' country of origin. In the group of the American tourists, 59.5% answered "traditional sceneries and castles", while "Japanese cuisine" and "bustling shopping streets" were selected 54.1% and 48.6% of the time. The tourists from the USA also chose "experiencing tradition" (35.1%) more often than other respondents. Mainland Chinese tourists were looking forward to "shopping" (70.1%), "thermal baths" (69.2%) and "Japanese cuisine" (66.4%), and Korean tourists were hoping for good experiences related to "Japanese Cuisine" (55%), "thermal baths" (47.7%) and "nature and rice paddies" (45.0%).

In the same survey, when asked about the satisfaction rate in respect of the same selection of topics, while the overall order did not change, all topics show lower rates of satisfaction than at the expectation stage (JTB, 2011).

Experience that tourist look forward to				
	MRQ		SRQ	
	2016	2017	2016	2017
Eat Japanese food	71.2%	68.3%	26.0%	26.1%
Drink Japanese alcoholic beverages (Japanese Sake, Stay in a Japanese-style inn	22.1%	22.0%	1.4%	1.6%
Bathe in a hot spring	22.0%	18.1%	1.4%	1.5%
Nature/scenery sightseeing	29.6%	26.5%	8.1%	7.5%
Walking in shopping districts	47.9%	45.4%	16.4%	14.8%
Shopping	41.0%	39.9%	3.2%	3.6%
Theme parks	54.5%	53.4%	14.4%	13.9%
...	16.4%	16.4%	6.3%	7.9%
	n=39956	n=40213	n=39956	n=40213

Table 2: Experiences during the trip (compiled by the author based on MLIT 2017, 2018)

A report in 2016 shows different the expectations, while 76.2% of the respondents answered “Japanese cuisine”, and 56.6% answered “shopping”, the third most eagerly anticipated item in the list was “nature and scenic spots” selected by 46.8% of the respondents. The country-specific expectations have not changed significantly, with emphasis on “shopping” for the Asian tourists, and “Japanese history and experiencing tradition” among tourists from Europe and America (Tourism Business Research, 2016).

Similar questions were included in the Consumption Trend Survey for Foreigners Visiting Japan in 2016 and 2017 by the MLIT Japan Tourism Agency, with similar results. In a multiple-response question on this topic, 71.2% (2016) and 68.3% (2017) of the tourist all sending markets selected “eating Japanese food” as one of the experience they were looking forward to. In the case of the single response question on the same topic, 26% (2016) and 26.1% (2017) of tourists chose this category as the “experience looking forward to the most (JTA, 2017a) (JTA, 2018a)

These surveys show a trip with shopping, eating out, experiencing the traditional culture as well as enjoying the nature of the Japanese islands. While rural destinations have plenty of tourism resources in some of these categories,

an environment has to be created where the foreigners can experience these services to the fullest.

3.2.2. Difficulties during the trip

New technologies can help with online interactive maps of tourism destinations, pre-trip available printed maps of points of interest and regularly updated information on transport and services. While these technologies make the trip easier, the tourists still face different, and significant problems.

Host-Guest Communication

A survey was carried out by the Japan Tourism Agency in 2017, a continuation of two previous similar surveys. The last survey also had a follow-up question part, with topics selected as problems by the tourist in previous years. In the first year of 2014, “free public Wi-Fi” was the main problem faced by the tourists at 30.2%, but gradually this problem seems to be less severe. In the following two surveys, the percentage of foreign tourist marking it as problem fell to 18.5% and 13.7% respectively (JTA, 2017b, 2018b).

This can be attributed to the mobile Wi-Fi router rentals at airports, and the rising number of free Wi-Fi spots in and around the destinations.

The second problem is communication, which rose from 21.1% to 28.9% and while it fell back to 23.5% in the most recent survey, it is considered the number one problem that foreigners face during their trip to Japan. (JTA, 2017b, 2018b).

Inconvenience during travel (SRQ)	2014	2016	2017
Communication problems	21.1%	28.9%	23.5%
Free Public Wi-Fi	30.2%	18.5%	13.7%
Multilingual signs (Tourism information signs, etc)	4.7%	13.3%	13.2%
Insufficient number of places to get multilingual pamphlets and maps	3.1%		
Difficult to understand multilingual signs	2.0%		
Information on boarding public transport (trains, buses)	1.7%	11.1%	12.7%
Information on use public transport (connections)	4.9%	3.7%	5.5%
Credit and debit cards acceptance	2.6%	4.3%	5.8%
Reservations in restaurants and accommodations	1.3%	2.4%	3.1%
Obtaining information on restaurants and accommodations	1.2%		
	n=8352	n=3556	n=1996

Table 3: Inconveniences (compiled by the author based on MLIT 2015, 2017, 2018)

Communication problems

The surveys in 2016 and 2017 also contain more detailed questions on the communication troubles experienced during the trip. This focus is most likely because from 2014 to 2016, the number of tourists selecting communication as a problem increased from an already high percentage.

The place where the tourist had problems with communication or multilingual signs (MRQ)		
Restaurants	920	28.5%
Train station	561	17.4%
Retail establishments	522	16.2%
Accommodation	173	5.4%
Castles, Shinto Shrines and Buddhist Temples	316	9.8%
		n=3225

Table 4: Problematic signs (compiled by the author based on MLIT JTA 2018)

The first question connected to the communication problem focuses on the place wherein the difficulty was experienced, with respondents asked in main cities (Tokyo, Nagoya, Kyoto and Osaka) and outside of these cities. In both groups, “Restaurants and retail establishments” was selected as the group of places presenting the greatest difficulty with communication. This is followed by “train stations and terminals” and “accommodations” in a different order depending on the location of the survey.

Communication problems with the facilities staff (MRQ)	Main cities (Tokyo, Nagoya, Kyoto and Osaka)		Outside of the main cities	
Restaurants and retail establishments	I .	23.1%	I .	18.2%
Castles, Shinto Shrines and Buddhist Temples		8.7%		7.0%
Train stations and terminals	II .	12.2%	III .	7.7%
Art and history museums		5.8%		5.7%
On trains		6.7%		4.9%
Accommodations	III .	8.9%	II .	8.0%
Bus terminals		5.9%		5.3%
Taxis		7.0%		5.1%
On board of a bus		5.2%		4.5%
		n=4284	n=2665	

Table 5: Communication problems (compiled by the author based on MLIT JTA 2016)

In the 2016 survey, the restaurants and retail industry were linked together into one category, making it difficult for the tourism industry stakeholders to determine

where to improve. The survey of 2017 (published in 2018) already separates these two types of spaces into two categories, although reducing the number of possible answers. The results of this multiple response questions show that “restaurants” was selected by 28.5% of the respondents as the environment where the tourists had difficulties with communication and multilingual signs, followed by “train stations” and “retail establishments” 17.4% and 16.2% respectively. By separating the restaurants from the retail establishments, the focus of improvement can be channeled towards the area where it is most needed.

The central topic of the survey of 2017 is communications, with the next questions on the exact details of the problems, starting with the reason. In the restaurants and cafes topic, signs were selected as a problem in 55.5% and communication in 44.5%. As Table 6 shows, the most significant problem with the signs (and written media) is that there are not enough languages, while in terms of communication, the lack of foreign language skills of the staff is the main issue.

Reason why the tourist had difficulties with communication and multilingual signs (MRQ)		
Not enough languages	29.5%	} 55.5% Signs
The multilingual text is too short	14.0%	
The multilingual text has many mistranslations	8.3%	
The multilingual text's nouns are not matched	3.7%	
The staff didn't try to communicate at all	6.4%	} 44.5% Communication
The staff tried to communicate, but lacked the skills	33.1%	
The staff had skills, but the meaning didn't come trough	5.0%	
		n=605

Table 6: Communication difficulty reasons (compiled by the author based on MLIT JTA 2018)

The questions continue with the situation where the communication problem arose. The majority of the respondents pointed out that selecting and ordering food is the major hurdle. An interesting result is that “finding the establishment” is considered as a problem by a high number of foreign tourists, which problem can be traced back in part to the fact, that most of the time the name-signs of the restaurants are only written in Kanji, and also more often than not in quite difficult calligraphy styles.

Situation where the tourist had difficulties with communication and multilingual signs (MRQ)		
Selecting and ordering the food	605	65.8%
Finding the establishment	303	32.9%
Being explained how to eat	296	32.2%
Being show to the tables	77	8.4%
Paying	76	8.3%
Searching for toilet etc in the establishment	34	3.7%
other	15	1.6%
		n=920

Table 7: Multilingual signs (compiled by the author based on MLIT JTA 2018)

Furthermore, much of Japanese cuisine Washoku consists of unique types of food which can only be found in Japan, which, additionally, are often associated with detailed customs on how to eat these dishes. These can cause problems between the guest and other guests, the guest and the host, or just can lower the level of immersion into Japanese culture, something that foreign tourist often desires.

Multilingual tools that foreign tourist think that are necessary (SRQ)		
Photos and illustrations	1390	54.3%
Multilingual menus	857	33.5%
Explanation of Japanese unique style of eating	155	6.1%
Establishment (restaurant) applictaion	89	3.5%
Pictograms	70	2.7%
		n=2561

Table 8: Multilingual tools (compiled by the author based on MLIT JTA 2018)

The survey also asks foreign tourists, what kinds of tools should be developed and introduced in order that they are provided with a better experience, and achieve a higher level of guest satisfaction. A large number (54.3%) of the respondents chose “photos and illustrations” on this single response question as the necessary tool to gain a better experience. While photos help the selection process, illustrations can help with the description of the customs and methods of eating certain types of dishes.

Usefull information during travel (MRQ)		
	2016	2017
Accommodation facilities	25.2%	23.8%
Transport	46.8%	47.2%
Restaurants	32.7%	33.2%
Tourist facilities	22.9%	21.3%
Shopping locations	24.1%	22.9%
Free Wi-Fi	51.1%	45.2%
...		
	n=39956	n=40213

Table 9: Useful information (compiled by the author based on MLIT JTA 2017,2018)

Free Wi-Fi

Returning to the most selected problem in 2014, which was public free Wi-Fi access, its severity seems to be declining, from 30.2% in 2014 to 18.5% in 2016, 13.2% in the last year (2017). This moved the topic of public internet from the most selected inconvenience to the 4th place on the list. Information regarding free Wi-Fi is, however, still selected as “useful information during travel” by foreigners. In the Consumption Trend Survey for Foreigners Visiting Japan both in 2016 and 2017 Free Wi-Fi information was selected most often from multiple response questions on the issue, at 51.1% and 54.2% respectively (JTA, 2017a, 2018a).

Method of payment

The number of electronic payments with credit and debit cards is growing in Japan, a country that is still a cash-oriented, with only 7% of e-commerce penetration (Du, 2020). The reasons why foreign tourist prefer this payment is not just the simple and practical nature of electric payment, but he relatively high costs and the bad exchange rate associated with withdrawing cash from an ATM. Not only does card payment allow the traveller to travel with less cash, but because of the better exchange rate, it does also make it cheaper to pay for the services and goods, even if only by a fraction of the price. The previously mentioned Survey on inbound tourism readiness (JTA, 2017b, 2018b) shows credit and debit card acceptance as a growing problem during the trip, as in the

three years of the survey this topic was selected in 2.6%, 4.3% and 5.8% of the time by the tourists. In the last year of the survey, tourist chose 8.3% of the time “paying” as a situation in the restaurants, where they experienced difficulty, but a more detailed survey is needed to determine how much electronic payment played a part in this problem.

Electronic payment is a growing industry worldwide, and it is an important change in the behaviour of tourists from Asian sending markets too. A survey by Nielsen and Alipay showed that 41% of the Chinese tourists’ marked “payment method” as an important factor affecting shopping overseas. The survey also states that 82% of the respondents used their bank cards for payment during their last visit (Nielsen and Alipay, 2017). South Korea is also moving towards electronic payment, where the data of the Bank of Korea (BOK) cited by The Strait Times show that cash payment is one of the lowest in the world (Choon, 2016). With the tourists and residents of the growing sending markets (such as China and South Korea) introduction of electronic payment methods is important for the tourism industry both for tourist satisfaction and for increasing the money spent by tourists in a given destination.

3.3. Accommodation sector and workforce deficit

The accommodation industry struggles from a structural problem caused by the ageing population as well as tries to adapt to the challenges of inbound tourism.

3.3.1. Shortage of workforce

The shrinking and ageing population of Japan is putting a stress on many industries and the accommodation sector of the tourism industry is not different.

According to a survey of the Teikoku Databank, 50.3% of the 9775 companies that participated in the survey answered that there is a shortage on the labour market for full-time positions. The survey is aiming for a wide scope; consequently the companies from a certain industry, for example tourism, are not too many, with 42 restaurants and 26 hotels and ryokan traditional inns, and 1531 from the “service”(サービス) sector. Although the number of restaurants participating was

low, 78.6% of them expressed difficulties with aforementioned labour market. Hotels and ryokan traditional inns answered they have difficulties in 54.2% of the time (Teikoku Databank, Apr. 2019).

A similar survey concentrating on the 5 prefectures of Chugoku area showed that 48% of the companies answer that there are not enough people to hire full-time positions, with the “service”(サービス) sector being the highest at 65% (Fulltime employee shortage in the Chugoku 5 prefecture area (survey), 2019).

The White Paper on Tourism and Tourism released by the Ministry of Land, Infrastructure, Transport and Tourism shows a slow rise in the average age of employees and the average length of employment at the establishment for the accommodations sector (MLIT 2015, 2016, 2017, 2018, 2019). This survey was carried out among accommodations with more than 10 employees, a large portion of the small establishments and the *minshuku* (traditional private home accommodations), are not reflected in these numbers.



Figure 1: Data on age and employment in accommodation sector. Left axis age (unit: year), right axis employment. (compiled by author from MLIT 2015, 2016, 2017, 2018, 2019)

The same type of reports from earlier years did not contain this specific data, which show the topic is already being monitored in the ministry too (MLIT 2014).

Mizuho Research Center in 2017 published a report, titled “Accommodation sector's workforce shortage, casting a shadow on Tourism Nation”, which emphasized that the current trend shows the successful elimination of the hotel shortage, but a problem that the industry is not taking seriously enough is that of the workforce shortage. The report continues quoting statistics that show the shirking of the guestroom per accommodation, which may be connected to the ageing of the management and the staff (Miyajima, 2017). A similar change is seen in the island destination of Ojika (Nagasaki Prefecture), where demographics are limiting the local tourism development both in ageing accommodation operators without successors and in the limit of available workforce (Perlaky, 2018).

Kumada (2018) in an analysis of the challenges of inbound tourism reflects on the management attitude and the changing environment of the tourism industry. The technological developments that help overcome language barriers and the new age of internet where information is available worldwide, also changes the behavior of tourist. Kumada argues that with the change of tourism from group tourists to FIT (free individual tourists), the most important investment is in the human resources and surrounding environment (Kumada, 2018).

3.3.2. Employing women, workforce deficit

Yagasaki (2019) shows that in both urban and rural destinations there is a severe shortage of workforce in the accommodation sector. Employing more females, elders and foreigners in the accommodation services is needed to overcome this issue (Yagasaki, 2019).

According to Yagasaki, the trend of employing more women and elders is already visible and resulted in a 15% rise of employees in this sector compared to the 6% rise of the overall tourism industry between 2012 and 2018. Nonetheless, while the tourism industry's selection ratio (有効求人倍率) is 1.38, the accommodation sector's is as high as 6.15, showing a massive gap between the number of people needed and the applicants. According to the data, this high demand also includes management-level positions. Yagasaki states that even with the change of visa permits, allowing more skilled workers to enter the country,

as much as 100'000 workforce deficit is foreseeable by 2023 (Yagasaki, 2019).

3.3.3. The impact of migration on the hotel industry

The importance of employing workforce from outside is detailed in Yasumoto's article (2015), for it brings an outsider's perspective, which is crucial for development. The other important aspect is getting young and skilled people to work in rural destinations.

The role of foreigners as employees in the accommodations sector is changing in Japan. Yoshida (2019) explains in a research paper that other developed countries such as the United States of America, United Kingdom, Australia and Canada have an already mature workforce market in this sense, as the "accommodation industry is already dependent on immigrant workers" in these countries (Yoshida, 2019, p. 193). One of the examples in the hospitality sector of London, where 60% to 80% of the employees are immigrants. In Japan 12.3% of the immigrant workers find jobs in the accommodation and service industry, with Tokyo as the largest population of these workers. These employees are staying in Japan under different visa qualifications, with more than half (58%) having an exchange student (留学生) visas (Yoshida, 2019). While Tokyo and other cities that have universities and other education facilities attracting foreign students, rural destinations can not use this resource of young and language speaking workforce.

The recent change in the visa system targets to raise the number of foreign workers in Japan, with a broader variety of possible employment in the future. One of the industries aimed to be supported by this change is the accommodation industry (Yoshida, 2019), and with the change of visa system, rural destinations may have a chance to attract foreign workers too.

3.3.4. Innovation

Tourism is a workforce dependent service industry. There have been some projects in Japan's tourism sector to try to automate tasks such as dishwashing, cooking, welcoming guest, and so forth, but there are some tasks which are too difficult for the current technology to handle. While a study showed that modernisation could have very good results both for managers and employees,

these studies concentrate only on the large, often international hotels (Shina, Perduea, & Kangb, 2019). One of the problems with automatization is that only a small number of companies have the financial background to embark on such research and development project (Shibata, 2019), and the market for these solutions is too young to have off-the-shelf solutions at a reasonable price.

3.4. Accommodation sector and inbound tourism

The growing number of inbound tourists is having a profound impact on the tourism industry and the accommodations sector. The income from foreign tourists is an important new income for some establishments. Tanaka (2013) calculated the geographic concentration of foreign visitors and showed that while on the national level the tourism industry is benefiting from inbound tourism, there is a significant geographical concentration of foreign tourists (Tanaka, 2013). Yagasaki supported this by stating that accommodations along the “*Golden route*” have high occupancy rates, but rural establishments have many empty rooms (Yagasaki, 2019).

3.4.1. Productivity Service management

The inbound tourism became an important sector for both the tourism industry and as one of the designated important pillars of Japan’s economy. Morikawa (2017) in a paper gathers the reason why the accommodation industry needs foreign tourists in the long run. The paper states that foreign guests not only increase demand in the accommodation industry but also improve the situation of the establishments through “temporal smoothing of guest-nights” seasonality. (Morikawa, 2017, p. 3). Through estimations, Morikawa’s paper shows that monthly volatilities of guest-nights for non-Japanese visitors is smaller than that of the Japanese visitors, and that “the increase in the number of foreign visitors significantly improves the measured physical total factor productivity” (Morikawa, 2017, p. 10).

The same effect can be seen in Yagasaki’s (2019) article, where the Kyoto Tourism Survey is quoted. The data shows that the busiest month of 2003 was November with 6.66 million visitors, sharp contrast compared to the 1.86 million

in February. The same survey states that in 2016 had 5.76 million visitors in March and 3.76 million in September, reducing the seasonality multiplier from 3.6 in 2003 to 1.5 in 2016 (Yagasaki, 2019).

3.4.2. Service Management

The services provided to the foreign guest in an accommodation facility is different from that of the domestic guests. Morishita (2019) in an article, states that foreigners often stay longer in one establishment, their long vacation patterns are different from the Japanese, and there is usually a longer lead-time between reservation and the stay. These are all beneficial for the establishments, as they smoothen out the aforementioned seasonal fluctuations. On the other hand, foreign guest are often complaining for reasons such as lack of communication skills and willingness of the staff and having difficulties with ryokan dinners where in cases the meals and proper eating method is not explained. Although the new advancements in information technology and AI provides easy access to translating devices, these solutions are only good for basic communication. Morishita argues that while the *omotenashi* (hospitality) that Japan is famous for is difficult to convey in a multilingual environment with the lack of language skills, examples from Kyoto shows that more than the language, the will to provide this *omotenashi* is the key to the high satisfaction of the guests (Morishita, 2019).

Contrast to this, Yagasaki's states that while the access of rural destinations and the multilingual signs are something that is continuously improved upon, the most important is overcoming the rural accommodations attitude toward foreign tourists (Yagasaki, 2019, p. 14)

3.5. Tourism Area Life Cycle model

The aforementioned research papers show destinations which have experienced a growth in the past, reached a peak, and due to different reasons started to see a fall in visitors. Some of the destinations facing declining visitor numbers innovated and were capable of growing again. This development stage curve is described in the Tourism Area LifeCycle (TALC) model.

The TALC model, which was formulated by Butler in 1980 is an often-used way

of evaluation a destination's status in evolution. The author himself revisited the model in 2011, discussing its continuous use, and how it has been adapted to different situations (Butler, 2011). The model is often used in connection with Quality-of-life (QOL) analysis (Uysal, Woo, & Signal, 2012), with a certain specific type of destinations such as island destinations (Rodriguez, Parra-Lopez, & Yanes-Estevez, 2008) and in connection to the crisis-resilience of destinations in a wider sense (Bojanic, 2005).

The innovation process towards the inbound market of a rural destination was analyzed (partly) by the TALC model by Carolin Funck, selecting Takayama as an example of a success story for this type of transition (Funck, 2012).

The model consists of several stages that which show the maturity of a tourism area, or destination. According to the process, the Exploration stage is where there are only a few tourists in the destination, and the locals do not really have any developments specifically for these visitors. In the involvement stage, there is limited interaction with the residents and some basic service. In the development stage, the local industry has already realized the tourism potential and is progressively building infrastructure and services for this specific purpose. In the consolidation stage, the capacity is running to its full potential, the growth rate of the visitors has already peaked. In the stagnation stage, the capacity is already full, the destination needs to change, innovate or face decline.

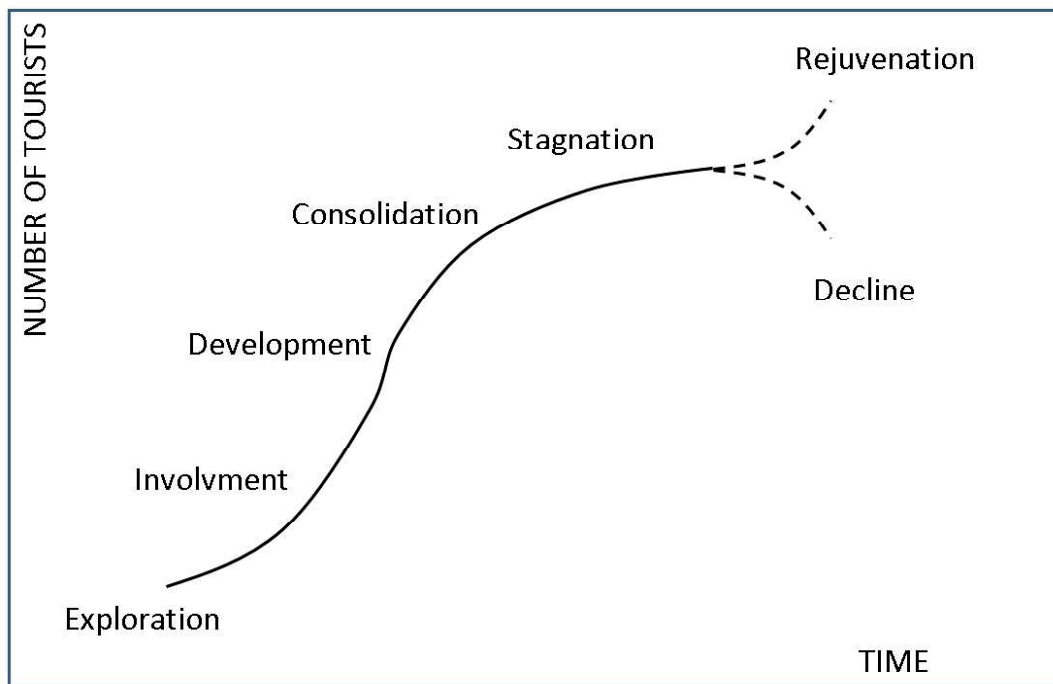


Figure 2: Tourism Area Life Cycle, as in Butler's article, recreated by the author

The research connected to the destinations' TALC status is often in its mature stage and "stagnation phase has received the most attention" (Rodríguez, Parra-López, & Yanes-Estevez, 2008).

The TALC is an important tool to assess the destination's current situation in terms of development. The model's strength is in its simplicity, as it is also a tool to communicate the data to the stakeholders. While from a tourism research point of view this model is in a sense oversimplifying the complicated architecture of a destination and its development, generalizing the development of different segments into one simple graph, it is a needed simplification when it comes to communication. Tourism stakeholders, both public and private sector are preoccupied with their daily tasks, and often do not have the resources to conduct a detailed analysis of the available statistics. The TALC is in no way a substitute of such a detailed analysis or that of a strategy with KPIs, but it is a once-in-a-year short briefing on where the destination is heading.

This development curve is the most often used and most visible part of the TALC model, but it is nearly not all of it. The model also contains different community and stakeholder indicators, such as rising rent in the destination, changing ratio of local and non-local investment and ownership of

establishments, residents' attitude towards tourism and the tourist mix from the unknown destination seeking adventurers to the mass tourism symbol group tourism.

These indicators require a longitudinal research approach, a survey conducted through several years to understand the change in the destination's structure.

3.6. Literature review summary

The articles and case studies show some of the key topics of recent general and inbound themed tourism research, such as inbound tourism, accommodation sector, foreign tourist environment and successful destinations.

Japan faces difficulties such as the possibility of declining domestic tourism due to the ageing and shrinking society and shortage of workforce. Rural communities with already existing tourism infrastructure need to start developing the destinations towards the inbound tourism market. Creating a foreign-friendly environment is one of the first steps towards attracting foreign tourists, but small communities may have some problems in reorienting themselves.

Successful tourist destinations which were able to reorient themselves towards inbound tourism by understanding the expectations and difficulties of foreign tourists, either through community development or with capital coming from outside of the community.

Tourism is an integrated system, which cannot work without any of the crucial parts. Marketing, transportation, accommodations and service (restaurant) sector are all needed to have a functioning destination. The literature review focused on a small part of this system, with accommodations as one of the key points of interest in this research.

Case studies and government surveys

Takayama and Niseko are often given as examples of successful destination innovation, where public and private stakeholders worked together, sometimes preceding the central government's move on opening up to inbound tourism. Tsuwano, the chosen case study destination had a similar "furusato" and "traditional town" tourism boom in the 20th century. Still, the question is whether

it succeeds in making the transition towards inbound tourism the same way, or if not, what are the core differences that lead to this result?

The above literature review showed that there are some patterns for successful adaptation of established tourism destinations to accept and welcome foreign tourists and become an inbound oriented destination.

Takayama, an often-cited successful example, was leading with a multilingual environment (Funck, 2012) and a positive attitude towards learning languages (Nihon Koutsu Kousha, 2018), and developing a new mindset (Funck & Cooper, 2013, p. 178).

Niseko and Hakuba, once famous destination changed with the help of foreign investment although there was some intercultural friction between stakeholders.

Hakone's townscape is changing in part because of the different interest of foreign tourists, a change accepted by some locals and disliked by others. There also seems to be a different attitude towards foreigners based on the sending market. Still, altogether the destination introduced multilingual service and hired foreign staff to cater to the needs of the new tourists.

These above-mentioned destinations are partly developed by locals or at least domestic stakeholders, but also show some foreign investment. This capital from abroad leads to intercultural differences but also improves the readiness of the destination, as it gives the ability to have the perspective of a foreigner.

The tourist environment is discussed with the result of surveys carried governmental organization, and the expectations and difficulties of the trip are summarized.

The accommodation sector, as an essential part of the tourism industry, needs inbound tourism to soften the seasonality but also struggles with a severe workforce shortage. While this lack of labour makes it difficult to serve the growing market of inbound visitors, foreign employees could be one solution to address the issue.

Finally, as a summary of a destination's development phase, TALC was introduced, as a simple but powerful communication tool between stakeholders of the destinations. The local government, together with the tourism association, is using terminology similar to TALC to convey the "healthiness" of a destination

to its stakeholders. In the later chapters, it is proven that while the statistics show that Tsuwano is in stagnation, and there is time left to act, in reality, a strong decline started years ago. If this reality is miscommunicated, the stakeholders might not feel the emergency of the situation, and may not act accordingly.

Survey and interview based on the literature review

In the following chapters, a general survey is conducted in Tsuwano and reference destinations to assess the current situation and the measure whether the above-mentioned developments (multilingual environment and service, foreign staff, foreign capital, endogenous development, etc.) are in progress, and how well the tourist environment fits foreigners (tourist expectations and difficulties). The accommodation survey also includes questions on difficulties with workforce shortage and other previously mentioned issues that the accommodations industry faces. In later chapters, the analysis is continued with the public sector and tourism association interviews to understand the development strategy of Tsuwano destination.

4. Reference heritage destinations

During the literature review, research papers were introduced on several topics, with several case studies on a few specific destinations. Journal articles on inbound success stories tend to concentrate on only a handful of places and leave other parts of Japan unrecorded.

The main focus of this research is Tsuwano, a small town in Shimane Prefecture, which had a prospering tourism industry from the 1970s based on its charm and traditional sceneries. Comparison of Tsuwano to Niseko and other success stories is difficult, partly because the base of the attractiveness is and geographical location (and distance from main travel hubs) is different. A small samurai town on the border of one of the least populated prefectures of Japan has a different history than a ski resort next to Sapporo. Therefore, a handful of similar heritage destinations were chosen as a base for comparison to Tsuwano.

4.1.1. Choosing the reference destinations

The destinations selected to conduct the survey as a reference point to Tsuwano have several key elements in common.

The destinations have “heritage” as a central part of their brand and have received either a Japan Heritage or a UNESCO World Heritage designations. As Tsuwano is aiming to create a brand around the same “heritage” keyword, the target tourist are similar (compared to sports destinations).

Most of the locations are in western Honshu as is Tsuwano, with distance from the main Shinkansen line and airports varying. The similarity in most of the location (with Ojika and Takayama es exception) is that they are between Fukuoka and the Osaka area, two of the busiest inbound tourism and transportation (airport) hubs.

Some of the reference destinations have achieved success measured and reflected in tourism statistics, while other destinations (such as Ojika) have received recognition in the form of awards and status.

The list of reference destinations was compiled to best suit as a comparison to the heritage town of Tsuwano in terms of tourist environment and attitude towards inbound tourism.

4.1.2. Destination description

Takayama

Takayama is one of the selected destinations that has received attention from tourism scholars in Japan. The city’s decision to open up to the inbound market and the residents' motivation to start developing a foreign-friendly environment resulted in an early success, well before the proclamation of Tourism Nation by the government.

Takayama also received a “Preservation District for Groups of Traditional Buildings” district designation in 1979 (National Preservation District for Groups of Traditional Buildings Association, 1979b).

The destination received praising for its sake tourism in UNWTO’s paper on gastronomy, emphasizing the activity of the local sake associations, that offer guided brewery tours and other experience-based tourism services (UNWTO, 2019).

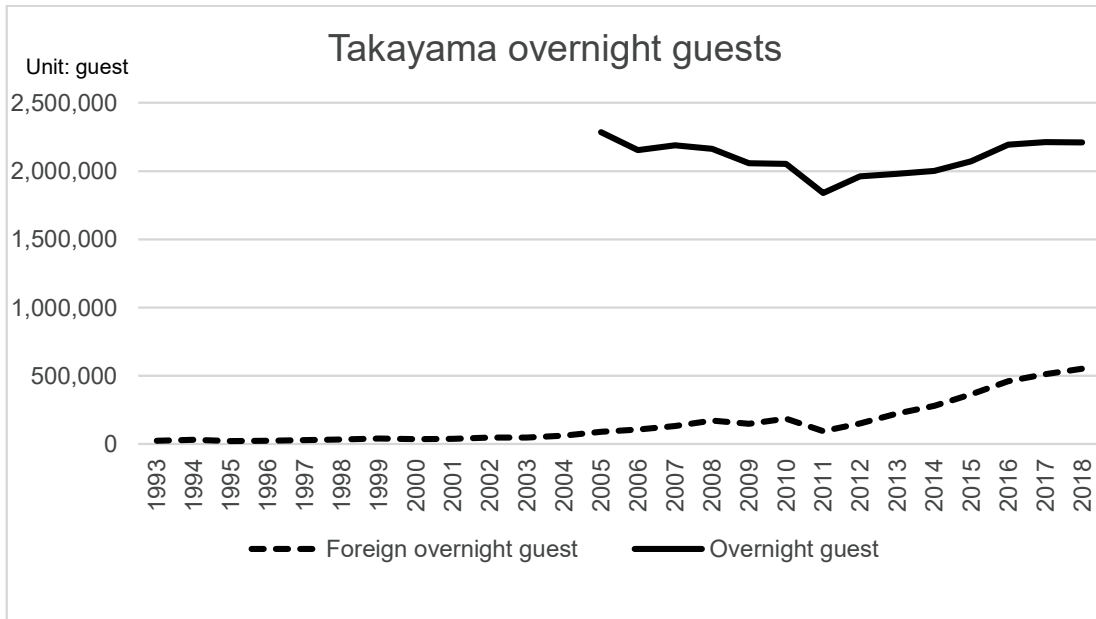


Figure 3: Takayama City’s tourism statistics (compiled by the author based on Takayama City, 2011, 2013, 2015, 2017, 2019).

2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
4%	5%	6%	8%	7%	9%	5%	8%	11%	14%	18%	21%	23%	25%

Source: Tourism Statistics 2010-2018, Takayama City Hall Commerce and Tourism Department (compiled by the author)

Table 10: Takayama City’s foreign overnight tourist ratio.

Takayama City had a slow but steady grow of inbound tourist which in 2018 accounted for 25% of the total overnight visitors as shown in Table 10. This also counterbalanced the shrinking domestic tourist numbers as seen in Figure 3.

Hagi

Hagi City is in the vicinity of Tsuwano Town only 50km or a little over an hour by bus, but it is located in Yamaguchi Prefecture. Hagi, similar to Tsuwano, is well known as a samurai or castle town, and in the tourism boom of 1970s, the two destinations were often promoted together. This leads to the misunderstanding that a large part of the visitors to Tsuwano think they are in Yamaguchi Prefecture. The destination experienced a drop of visitor numbers from the 2'250'000 in the 1970s to 1'430'000 in 2003. Overnight guests have also declined by 440'000 to 470'000 through the same time period (Murakami & Nishiyama, 2015). (Consecutive data is not available for the Hagi City before 2012). (data is only available 2012)

Although the residents and the local government started townscape preservation in the 1970s with early townscape regulations, some of the built heritage was lost in recent years. The city is often the topic of tourism research, concentrating on the use of built heritage and open museum concept that the city has adopted (Murakami & Nishiyama, 2015), and as comparison to other rural destinations in the vicinity (Hamada, 2011)The city did receive a “Preservation District for Groups of Traditional Buildings” designation in 1979 (National Preservation District for Groups of Traditional Buildings Association, 1976). (Murakami & Nishiyama, 2015)

The city has 5 of 23 sites of the “Site of Japan’s Meiji Industrial Revolution” UNESCO world heritage, which was designated in 2015 and tries to promote this industrial heritage domestically and internationally. The difficulty of this promotion is similar to that of Tsuwano, as Meiji Ishin (Meiji Restoration), and the connected historical figures such as the first prime minister of Japan, Itō Hirobumi and the school these important people have learned is something unfamiliar for foreigners. While Japanese learn these names and places in school, and often see references in period TV series called Taiga drama, for foreigners, the explanation starts with the concept of Edo period and Meiji period.

Hagi has been introduced as a case study of gastronomy tourism in UNWTO’s paper on the topic, with NPO Genki-no-kai and its local traditional recipe preservation and activities (UNWTO, 2019).

The Hagi City representatives were not willing to provide more detailed data on overnight guests and the prefectural tourism statistics do not have settlement-based data published. While consistent data for Hagi City is only available from 2012, the growing importance of the foreign overnight tourist is apparent from Table 11.

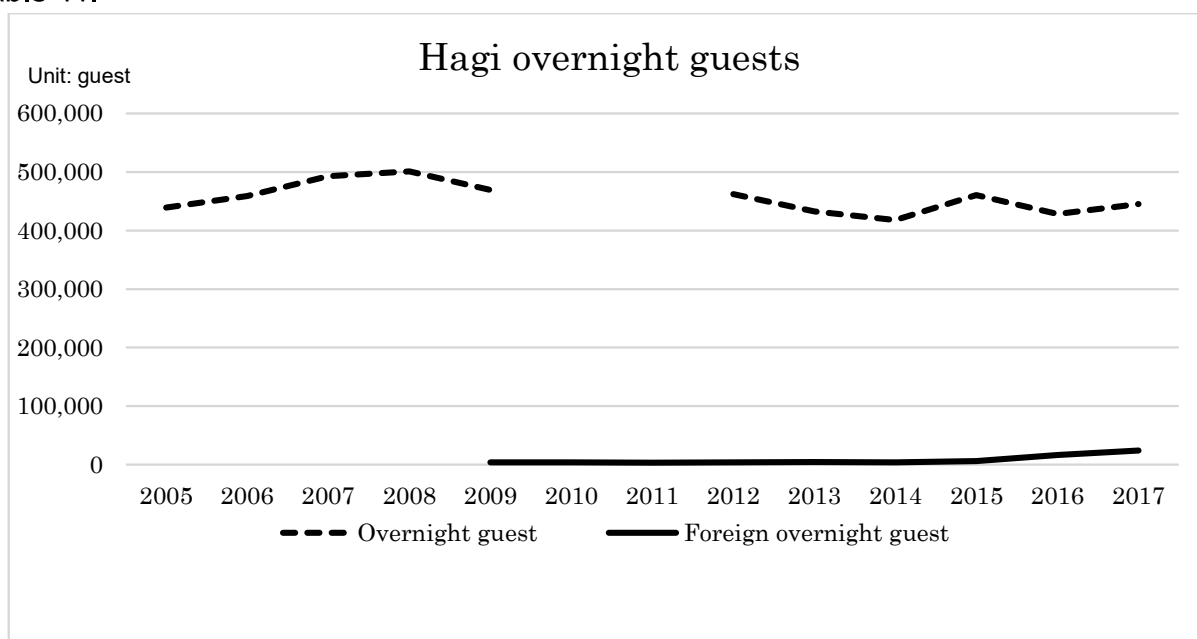


Figure 4: Hagi City’s tourism statistics (compiled by the author based on Yamaguchi Prefecture Tourism Survey Results 2005-2009 (Yamaguchi Prefecture), Hagi Statistics 2017 (Hagi City, 2018), Hagi DMO Strategy (Hagi Tourism Association, 2018), Foreign tourists accommodation survey (not published) (Hagi City, 2018))

2009	2010	2011	2012	2013	2014	2015	2016	2017
0.8%			0.8%	1.0%	1.0%	1.3%	3.8%	5.4%

Table 11: Hagi City’s foreign overnight tourist ratio (compiled by the author based on Yamaguchi Prefecture Tourism Survey Results 2005-2009 (Yamaguchi Prefecture), Hagi Statistics 2017 (Hagi City, 2018), Hagi DMO Strategy (Hagi Tourism Association, 2018), Foreign tourists accommodation survey (not published) (Hagi City, 2018))

Shimonoseki

Shimonoseki has a Japan Heritage designation under the name “Kanmon Nostalgic Straits” together with the city across the channel Moji (Kitakyushu City, Fukuoka Prefecture). The city is the westernmost point of Honshū and is home to fishing and harbour industry. It also has a ship-route connection to South-Korea,

making it an entry point to the country for visitors from across the sea. The risk of being dependent on one sending market is felt, as international friction between the two countries has grown in the past few months (The Japan Times, 2019). The Japan Heritage designation on the Shimonoseki site contains a mix of buildings, temples and story, which is somewhat difficult to convey without the historical background knowledge.

Shimonoseki was also mentioned by UNWTO's paper on gastronomy tourism as one of the case studies of Japan. The city was praised for its branding of Shimonoseki Fugu pufferfish and Anko anglerfish and related processing industries, enabling for restaurants and *ryokans* across the country to safely use these highly toxic fish (UNWTO, 2019)

Sir Rutherford already mentions Shimonoseki in his book as a place where everyone travelling from Nagasaki to Edo makes a stop, and where the European wares are distributed to other parts of Japan. The author already mentions a booklet, on the must-see sites of Shimonoseki thus it was already favored by foreigner in 1863 enough, that there was a simple guidebook written about it (Sir Rutherford, 1863).

Onomichi

Onomichi is a former industry and harbour town in Hiroshima prefecture, designated as a Japan Heritage in itself and as part of 2 other designations. The first designation is of the city's intact layout and atmosphere, with the title "A Miniature Garden City from the Middle Ages Built Around the Onomichi Channel". The second designation is in connection with the Murakami Kaizoku, a historically important and once-powerful sea-military organisation, often translated as Murakami Pirates. This group was ruling and keeping the piece in the Inland Sea Channels, and built an extensive fortification infrastructure. The third designation is The Kitamae-Bune Sea Routes part of a larger series, with members from 7 prefecture.

Onomichi is also developing its movie-tourism, with several nationwide known films using the city's scenery as backgrounds. The development of this content-based tourism is supported both by the local government, but also by the

residents through an NPO run movie theater and tours (Wada, 2016, 2017).

Kurashiki

Kurashiki has been designated as a “Kurashiki and the Story of Fiber” and a famously intact old town centre. As later can be seen in the statistics, international tourism is flourishing, and Kurashiki is also the only community with a slightly growing population in this list of destinations. Kurashiki is also part of “Momotaro Densetsu the birth of Okayama” and the aforementioned “Kitamae-Bune Sea Routes” designations. Kurashiki also received a “Preservation District for Groups of Traditional Buildings” district designation in 1979 (National Preservation District for Groups of Traditional Buildings Association, 1979a).

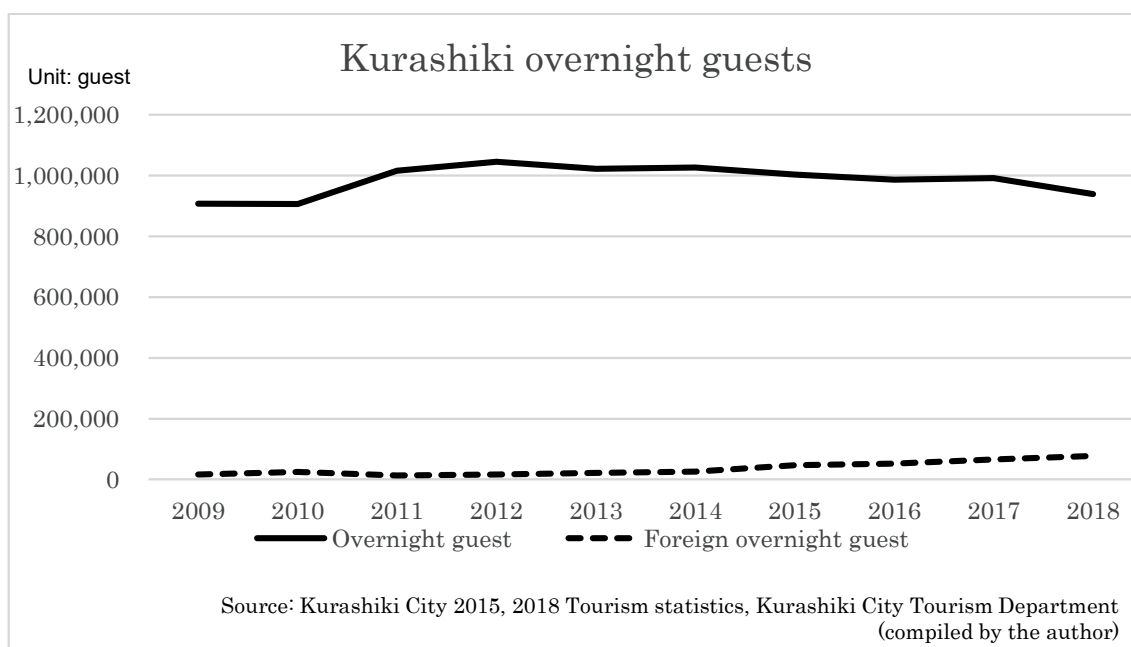


Figure 5: Kurashiki City’s tourism statistics (compiled by the author based on Kurashiki City Tourism statistics, 2015, 2018)

2009	2010	2011	2012	2013	2014	2015	2016	2017
1.8%	2.7%	1.2%	1.6%	2.1%	2.5%	4.7%	5.3%	6.7%

Table 12: Kurashiki City’s foreign overnight tourist ratio (compiled by the author based on Kurashiki City Tourism statistics, 2015, 2018)

Kurashiki City’s data is only available from 2009, and Figure 5 shows a stagnating overall overnight visitors. The ratio of foreign overnight visitors is slowly growing, reaching 6.7% in 2017 as shown in Table 12.

Ojika

Ojika is a small island community in Nagasaki Prefecture. It is the smallest destination in this selection with a population of only 3'268 on the 17 islands of the municipality (Ojika Town, 2016). In the Edo period, Ojika experienced a golden age with prospering whale hunting and as the last port for the *kentōshi* (Japanese missions to Tang China) envoys to China. Stepping into the 20th century, after reaching the population peak in 1950s, the fishing industry started to shrink, due to external factors (overfishing, changing market situation and global climate change). Ojika is part of a UNESCO World Heritage inscription of the "Hidden Christian Sites in the Nagasaki Region", as one of the 12 churches that were designated is on the neighbouring unmanned island of Nozaki, which belongs to Ojika municipality (World Heritage Registration Promotion Division, 2015). Ojika has been the topic of some tourism research papers and other publications, as its homestay program received attention (Small but shining, Ojika Town, 2013). The number of is fluctuating around a stead level since 1996, and although at the moment foreigners are not plenty, the community expects growing inbound activity due to the UNESCO World Heritage brand (Nagasaki Prefecture, 2018). The foreign overnight guests peaked around 2008, after the island started a home-stay program, and received the American People to People Award for best home-stay program (Ojika Island Tourism, 2019).

The difficulty with the tourism development of the island, both in terms of inbound and domestic market, is the limit that the workforce market is putting on the expansion. In a research paper a detailed description of the situation is given, with the successful and less successful projects of the local authorities to attract working age residents from outside of the island (Perlaky, 2018).

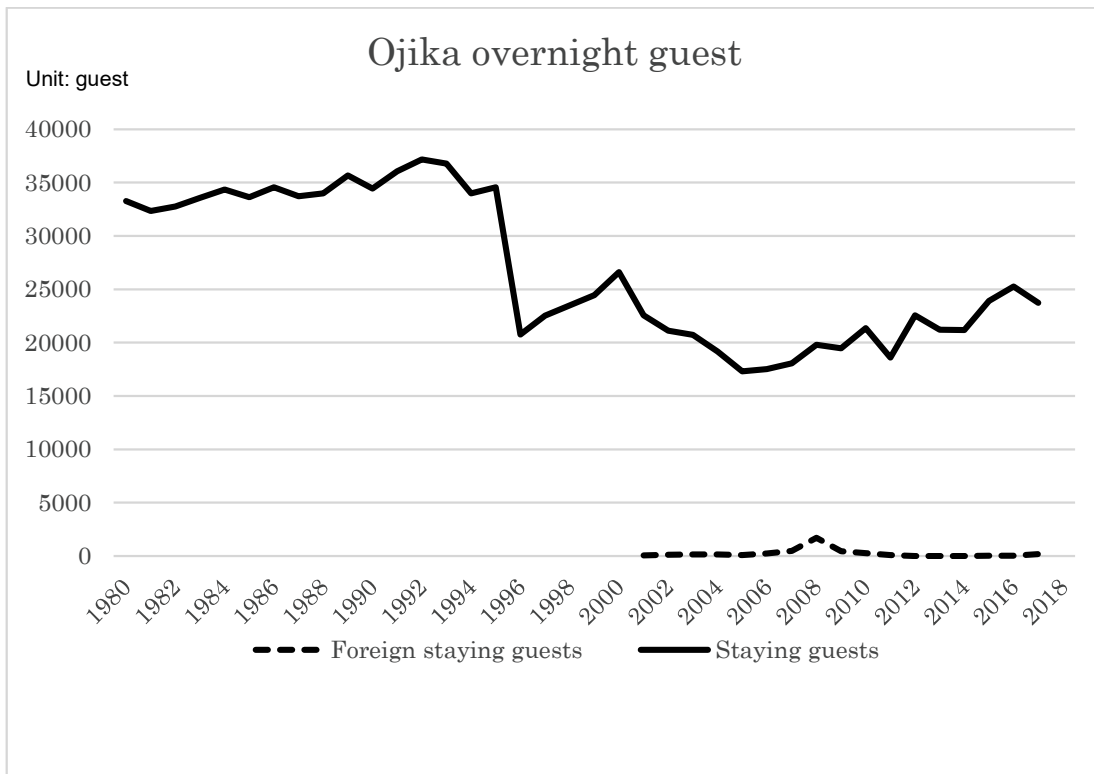


Figure 6: Ojika Town’s tourism statistics (compiled by the author based on Nagasaki Prefecture Tourism Statistics 1980-2018, Ojika Accommodation Statistics (unpublished), Ojika Town)

2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
0.2%	0.6%	0.8%	0.8%	0.5%	1.4%	2.7%	8.7%	2.3%	1.3%	0.5%	0.0%	0.0%	0.0%	0.1%	0.1%	0.8%

Table 13: Ojika Town’s foreign overnight tourist ratio (compiled by the author based on Nagasaki Prefecture Tourism Statistics 1980-2018, Ojika Accommodation Statistics (unpublished), Ojika Town)

Ojika Town’s tourism boom happened somewhere before 1980s, but data is only accessible from after this time period. The graph (in Figure 6) shows a sudden drop of visitors around 1994, which can be connected to the assets bubble and its aftermath. The ratio of foreign overnight visitors peaked in 2008, dropped to zero from 2012 to 2014 and started a slow rise from 2015, as seen in Table 13.

4.1.3. Statistics, demographics

The summary of the destination’s statistics can be seen in Table 14. The available tourism statistics change by prefecture and by destinations, with similarly varying calculation bases. Shimane Prefecture has guest nights as the base unit of the statistics, while Yamaguchi Pref., Okayama Pref. and Gifu Pref.

has overnight guests as the base of calculation. Hiroshima and Onomichi are concentrating on visitor numbers.

	Ojika Prefecture	Tsuwano Nagasaki	Hagi Shimane	Takayama Yamaguchi	Onomichi Gifu	Shimonoseki Hiroshima	Kurashiki Yamaguchi	Okayama
Population(2005)	3,268	9,461	59,578	96,231	150,225	290,693	469,377	
Population(2015)	2,560	7,956	49,560	89,182	138,636	268,517	477,118	
2005 base	-21.7%	-15.9%	-16.8%	-7.3%	-7.7%	-7.6%	1.6%	
Age 14 and under	7%	8.2%	9.8%	13%	11.5%	11.6%	13.7%	
Age from 15 to 64	44%	47.2%	50.5%	56%	54.0%	55.1%	57.6%	
Age 65 and above	47%	44.6%	39.5%	31%	34.0%	32.8%	26.0%	
Tourism (2017)	23,726 guestnights	34,049 guestnights	445,177 overnight guests	2,213,000 overnight guests	6,800,612 foreign visitors	809,582 overnight guests	991,702 overnight guests	
Change between 2012 and 2017 in overall tourist numbers	+5.1%	-3.9%	-3.7%	+12.9%	9.2%	9.1%	-+5.1%	
foreign tourist numbers	+9300%	+46.4%	+520%	+240%	+328.7%	+195%	+400.2%	
Percentage of foreign tourists								
2012	0.01%	1.6%	0.8%	7.70%	1.1%	0.9%	1.6%	
2017	0.8%	2.5%	5.4%	23.2%	4.2%	2.4%	6.7%	

Table 14: Tourism statistics of destinations.

Sources: (Hagi City, 2015), (Hagi City, 2019), (Hagi Tourism Association, 2018), (Tsuwano Town, 2016), (Tsuwano Town, 2018b), (Onomichi City, 2018a), (Onomichi City, 2018b), (Yamaguchi Prefecture, 2016), (Shimonoseki City, 2018), (Kurashiki City, 2018), (Takayama City, 2015), (Takayama City, 2016), (Takayama City, 2019), (Tsuwano Town, 2016) (Ojika Town, 2016) (Nagasaki Prefecture, 2018) (Nagasaki Prefecture, 2012) (Kurashiki City, 2015) (Kurashiki City, 2016) compiled by author

While the base of the statistics are different in certain cases, which makes the comparison with other destinations difficult, they are consistent with the calculations 5 years ago, thus the growth or shrinking of the destinations is clearly understood. The size of the destinations in the survey is different, with growing population from Ojika to Kurashiki.

4.1.4. Reference destinations

The destinations described above all have “heritage” as one of the keywords in their brands, mostly shrinking population and a growing number of international visitors. In Hagi’s case, a sudden rise in Korean tourists produced a 520% increase in 5 years, which makes the development of a multilingual environment a more urgent matter. While all destinations see more and more foreigners, they only account for 2-5% of the overall guests, which still makes it a difficult investment decision for the establishments.

Although the “heritage” keyword might be a common feature, the location, or rather the access of these destinations are slightly different. Tsuwano, Hagi and Takayama are a bit farther away from the main transport routes, but Onomichi,

Shimonoseki and Kurashiki have a Shinkansen bullet train connection and are closer to larger tourism hubs such as Fukuoka, Hiroshima and Nagoya.

5. Tourist environment and stakeholder attitude survey

The previous pages introduced to as a small town that has its golden days of the tourism boom and is slowly declining, although the residents still think of tourism as an important industry that needs to be developed. The survey that was carried out in Tsuwano aims to understand the current situation the tourism industry is in, but instead of just collecting and displaying this data, the creation of a reference base was attempted in this paper. A number of other destinations were selected from smaller to much larger than Tsuwano, with "heritage" being an important part of their brand. The following section will briefly describe the tourism connection of each destination, and finally, a summary of the demographic and tourism statistics are shown.

A similar survey conducted by Takeda and Kudo (2016) is also concentrating on the satisfaction of tourists were English communication, lack of cashless payment were among the problems pointed out by foreign tourists (Takeda & Kudo, 2016).

5.1. Survey: Restaurants

5.1.1. Research method

The survey consisted of a questionnaire sheet with questions on communication, bilingual information, available payment methods and internet access (Appendix A). The form was filled out by the author, on-site during the conversation with the owners and/or employees of the establishments. The targets of this survey were restaurants, cafes and eateries in the destinations. Establishments that are not serving food (snack bars, bars, etc.) and or are not open during daytime were excluded. The list of establishments was based on the destination's tourism association's members list.

Number of establishments responded to the survey	
Tsuwano	21
Hagi	36
Onomichi	28
Shimonoseki	22

Table 15: Survey respondents (compiled by author)

These conversations were in Japanese in order to have a better understanding of the situation the restaurants and cafes are in. The questions concentrated on the survey, but in some cases, other topics related to the inbound tourism arose. While the data-gathering was purposefully planned to be carried out on days that might have less traffic (avoiding holiday seasons), and before and after the daily peaks, the conversations were restricted in terms of length.

5.1.2. Survey results

English Service

The first question in the survey is about the English speaking staff in the establishments. The Japan Tourism Agency's report showed that the reason for difficulties in the restaurants was in 44.5% of the time connected to communication, with "lack of skills" accounting for 33.1% (JTA, 2018b).

The level of language proficiency is not part of the questionnaire as the interviewee might react negatively to such questions. The question has a "sometimes" answer, as in some cases the staff speaks a foreign language, but the owner does not. Because of schedules, that means that English service is not always available. This is more often the case when the staff is from a younger generation.

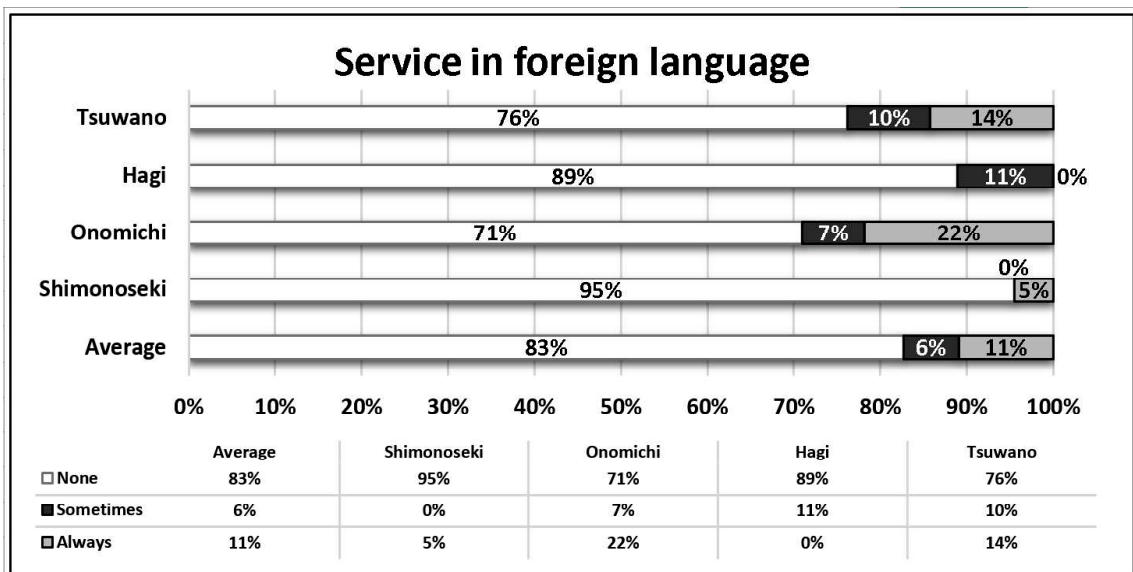


Figure 7: Service in a foreign language (compiled by author)

As seen on the Figure 7, service in foreign language changes but not necessary with the size of the destination. While Tsuwano has a low number of establishments, some are owned by young entrepreneurs, who have some education in foreign languages, on the contrary Hagi is a bigger settlement with more establishments, operated by owners in their 50s and 60s. Onomichi has seen a rise of foreigners and is closer to a big city like Hiroshima, with a young population, but Shimonoseki seems to have establishments catering more to the Japanese guests.

During the data gathering, often (4 times in Tsuwano and 3 times in Hagi) owners of the establishments expressed similar attitude towards foreign tourists, saying that “they are welcome”, but also added that “we are not interested in investing time and effort to learn languages”.

English menus

The next question was about the availability of English menu. The government’s survey showed that 55.5% of difficulties come from multilingual signs, and 29.5% out of that arising from “not enough languages” (JTA, 2018b).

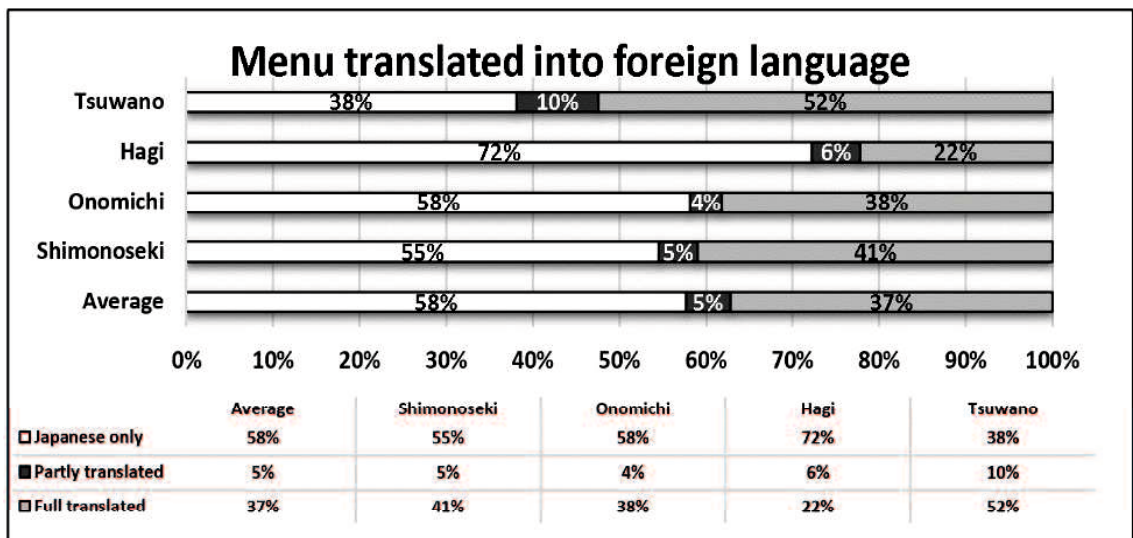


Figure 8: Translated menus (compiled by author)

Tsuwano showed a surprisingly high number of English menus, compared to Hagi, where 72% of the restaurants have only Japanese menu is available language. This high number of English menus is the result of a volunteer activity of students from The University of Shimane, as the restaurant owners explained in some cases. The students majoring in English visit different places in Shimane Prefecture and after a short period of data-gathering create English content about the visited destination. This includes English articles about their experience and also English menus, which are given to the restaurant owners during a second trip.

Hagi is in a different prefecture, which does not seem to have such an innovative program at the local universities, which can be seen in the data. Hagi had a sudden rise of foreign tourists and seemed to need more time to adjust to the new challenge of multilingual environment in the restaurants and cafes, while Onomichi and Shimonoseki, which had a longer period to introduce multilingual menus.

The owners of a few restaurants expressed their difficulties in translating the menus (3 in Tsuwano and 1 in Hagi, 3 in Onomichi had similar comments). One problem with the menus is that it is hard to find someone who is fluent in English and Japanese and can be trusted to translate it. On the one hand, they explained that it is hard to find a Japanese who is fluent English in these rural communities,

and they are afraid that if they approach a foreigner with this request, they will not be able to convey their message to them. Another problem mentioned by the same establishments is the seasonality of the menus, which would require translation frequently.

A further question was added to the survey after the first two destinations, about the multilingual menus. As the following Figure 9 shows a little more than half of the establishments which did not have multilingual menus, don't plan to introduce them in the future, and in some cases, the establishments are waiting for some support from the local authorities.

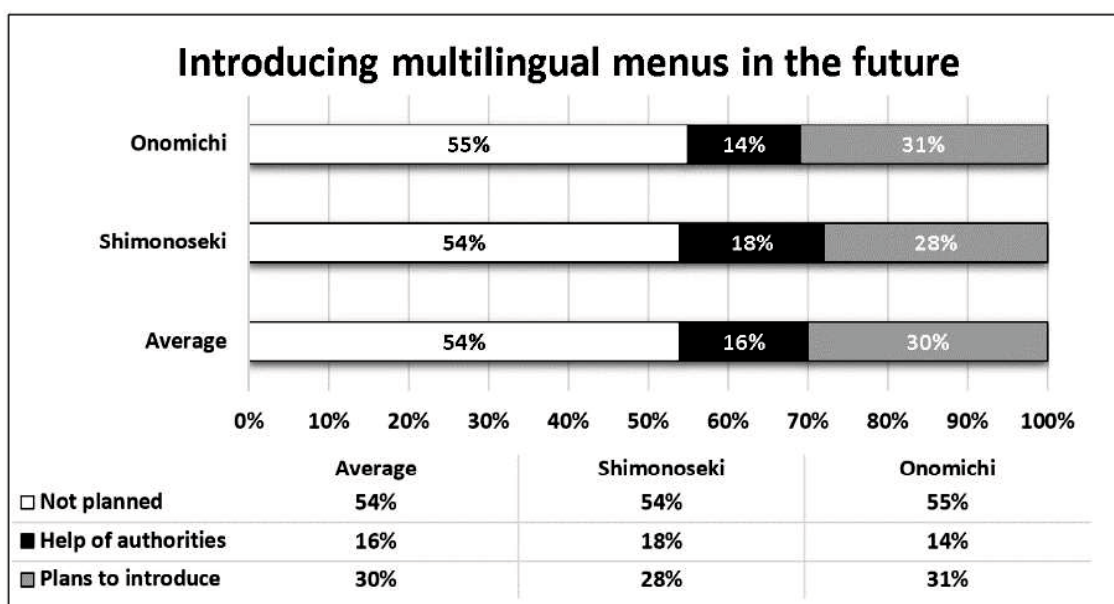


Figure 9: Multilingual menus (compiled by author)

Visual Aid

Visual aids are an important tool in serving foreign customers, as tourists expressed themselves in a previously mentioned survey, with 54.3% (SRQ) suggesting introducing photos and illustrations to the menus (JTA, 2018b). Visual aid in this survey is separated into two categories, one is photos that accompany the menu, and the other is realistic plastic food samples that are often used in Japan.

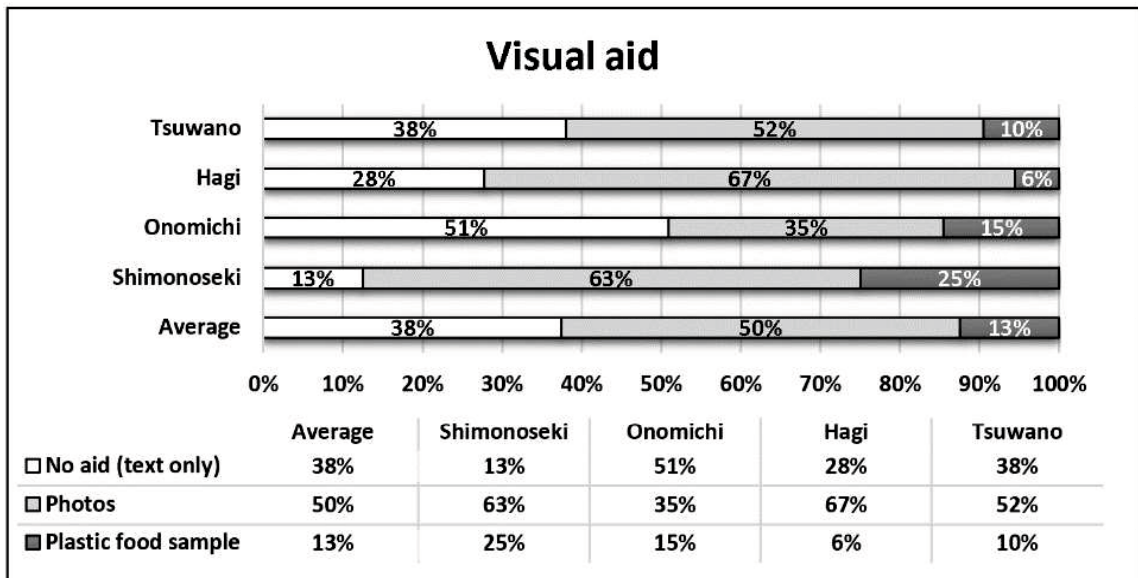


Figure 10: Visual aid (compiled by author)

Visual aids seem to be an important part of the Japanese restaurant scene, but with varying level. The size does not seem to be connected as even though Onomichi has a higher percentage of English service and multilingual menus, and it has a lower number of visual aids than the smaller Hagi and Tsuwano, or the bigger Shimonoseki.

On average, roughly 63% of the establishments have photos of the food or provide plastic samples of how the dish looks like, which can help the confused foreign tourist. While this does not help the consumer when it comes to allergies or religious rules on what can be in the food, it does provide some kind of idea of what the tourist is ordering, even if the tourist cannot read the menu.

The prevalence of establishments with text-only menus is higher in Tsuwano with 38% than in Hagi, where it is 28%. The reason for the text-only menus given by the restaurant owners (in 2 cases in Tsuwano, 1 case in Hagi, 4 in Shimonoseki) was that the menu changes quite often, by the four seasons and also by the seasonal fresh fish that can be caught. This makes it difficult even a stable Japanese menu, not to mention a translated menu. This applies to only a small part of the restaurants, which emphasise fresh fish from the market.

Payment method

Foreign tourists experienced problems with “credit and debit acceptance” in 5.8% (SRQ) of the MLIT JTA’s survey (2017), which is a significant increase from 2.6% from three years earlier.

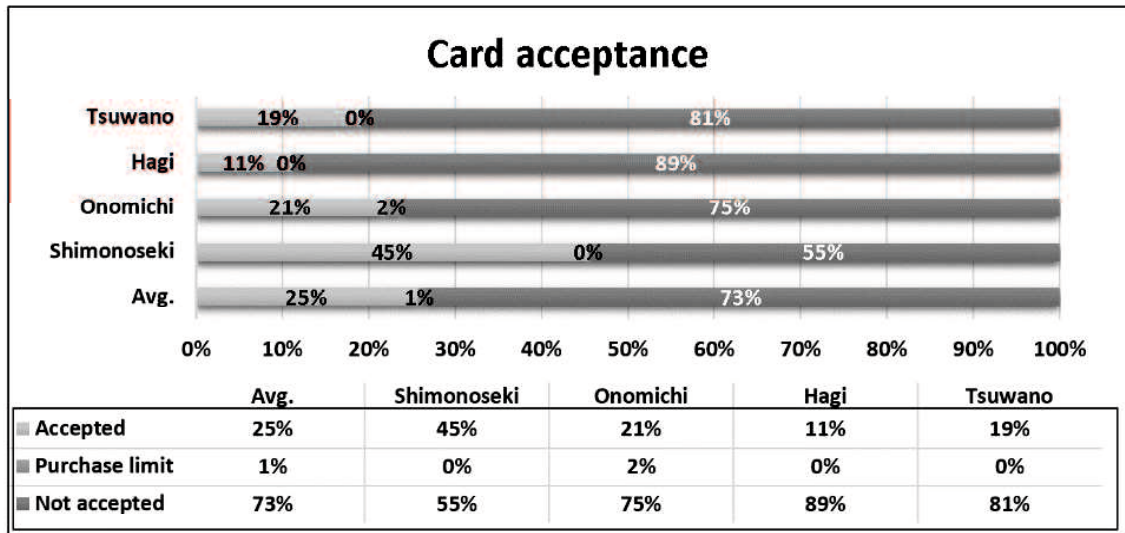


Figure 11: Payment method (compiled by author)

The four destinations that were part of the survey shows a low number of establishments where one can pay with internationally accepted credit and debit cards. During the interviews three establishments in Tsuwano and 4 in Hagi stated that they are considering or are in the process of introducing this service. The difficulty, as told by restaurant owners (4 establishments in Tsuwano and 2 in Hagi), is that operating an electronic payment service is “too expensive”. Another answer to this topic was that the “difficulty of operating these electronic payment terminals” is enough reason to abandon the idea.

While the survey in Hagi was carried out only in a part of the establishments, according to the Hagi Tourism Association, from the 122 registered restaurants and cafes, only 22 or 18% accept cards as a method of payment. The card payment acceptance varies by the type of establishments.

Free internet access

One of the difficulties that foreign tourists have during their trip to Japan is the lack of free Wi-Fi internet connections in the destinations. Companies and government agencies have started to address the problems with portable Wi-Fi

routers for rent and creating Wi-Fi zones in destinations. The results can be seen in the declining number of tourists selecting internet availability as a problem in the satisfaction surveys, from the 30.2% (SRQ) in 2014, 18.5% in 2016 down to 13.7% in 2017 but it is still a significant issue.

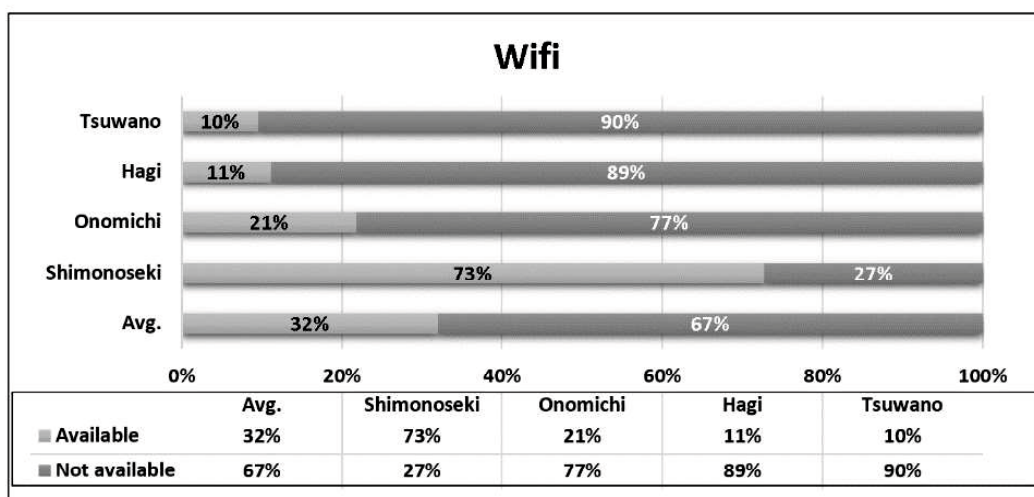


Figure 12: Wi-Fi service (compiled by author)

While Tsuwano and Hagi have a very low number of establishments with internet access, Onomichi has already some places where foreigners can connect to the internet. In the case of Shimonoseki, the city’s public Wi-fi is accessible in many of the restaurants and cafes.

In many cases, the owners of the restaurants themselves are not internet users (4 establishments in Tsuwano, 2 in Hagi and 4 in Onomichi). The local government's free public Wi-fi service is planned to be unveiled in 2019 in Tsuwano, which change the situation.

5.1.3. Survey summary

Surveys show the interest of foreign tourist towards *Washoku* and the experience of dining in Japan, while restaurants are selected as one of the places where they experience difficulties. Communication is one of the main sources of problems, followed with a low number of establishments accepting card payment and not enough free Wi-fi access. While verbal communication is a challenge between guest and host, signs and labels (menus and instructions) would help the most, according to the foreign tourist participating in the questionnaires.

Based on this definition of the problem a short survey was conducted in the rural destinations, to verify the tourism industry's side situation of this problem, and to compare to similar, but different in destination size, and the foreign language service levels.

The result of the survey suggests that the restaurants, cafes and eateries in rural areas are not yet prepared for tourist not familiar with the Japanese language. While proficiency in English and other foreign languages is difficult to achieve in the short term, in the changing environment from domestic tourism to foreign tourism, English menus and visual aids such as photos and illustrations can be created with fewer resources. The first survey conducted in Tsuwano showed a surprisingly high number of such English menus, compared to the lower number of establishments providing similar service in the larger city of Hagi. These English menus are the result of a university project undertaken by students of The University of Shimane who are majoring English. More research is needed on the topic of volunteer contributions to the tourism industry, such as in this case, the students' work in contributing to the English menus of the restaurants of a rural destination.

The other aspects of preparedness for foreign tourists (credit and debit card acceptance, free Wi-Fi service) are similar in the destinations, with a low level of availability of these amenities, thus a continuation of development projects and governmental support should be considered by local authorities.

Further research is proposed both vertically (larger destination) and horizontally (similarly sized destination) to get a more detailed picture and to determine if there is a connection between the size of a destination and the multilingual services provided in the destination's restaurants and other establishments. The attitude of these restaurant owners is also worth exploring, whether the communication difficulty is due to a lack of resources, indifference towards foreigners or if it is connected with the ageing society problem where owners and staff are not interested in investing resources before retirement.

5.2. Survey: Accommodation

5.2.1. Research method

The survey was carried out in 6 stages, with approximately one month for every destination. In order, Tsuwano (Jan. 2018), Onomichi (Aug. 2018), Ojika (Nov. 2018), Shimonoseki (May 2019), Kurashiki (May 2019), Hagi (Jun. 2019), Takayama (Jun.-Jul. 2019), identifying the destination based on the sender's name or phone number. Except for Takayama, the author personally travelled to the destinations, and visited the accommodations aiming for a higher valid survey sheet return, and to have short unstructured conversations with the owners and managers of the establishments. In Takayama, the number of accommodations made personally visiting them difficult, thus an introduction letter and question form was sent through the post.

The survey questions are compressed into a single A4 answer sheet, accompanied by a short description of the researcher and the survey topic. The accommodations were asked to send the filled out answer sheet through fax to the researcher's fax number. The list of accommodations was compiled from data of the local tourism associations as well as several online accommodation reservation sites.

Questionnaire

The questionnaire can be divided into several parts, starting with the base information of the establishment, such as type, year of establishment, size of the operations (room capacity and the number of full-time/part-time employees), the ratio of foreign guests and average price level of the accommodations.

The second part is a group of questions concentrated on tourism industry from the point of view of the accommodations, listing several topics which may cause difficulties, and a severity 4-grade scale from "not a problem" to "considered as a big problem".

Similarly, structured questions are asked about the inbound tourism and the concerns of the accommodations connected to it. After both the general tourism and inbound tourism question group, the establishments can pick three different topics that they "wish to receive support" from the local government or tourism

association.

The next part consists of a few questions on the tourist environment, a foreign tourist finds in accommodations (multilingual service and signage, etc). Lastly, questions on the accommodation's attitude towards foreigners are asked.

A varying level of valid replies can be seen in Table 16, with an average of 29.8%. The explanation for the high ratio of valid replies in Tsuwano is that at the time, the author was employed by the local government of Tsuwano in a tourism-related position, thus there was an already-existing connection with the managers of the accommodations. The low number of accommodations in small destinations accompanied by a somewhat low reply ratio makes it difficult to generalise from the results of the survey. There are several different types of establishments which sent valid answers to this survey, summarised in Table 16.

	Sent	Valid replies			Num.	
Ojika	11	3	27.3%	City hotel	5	7.1%
Tsuwano	11	7	63.6%	Business Hotel	12	17.1%
Hagi	35	9	25.7%	Resort hotel	2	2.9%
Takayama	91	25	27.5%	Onsen Ryokan	8	11.4%
Onomichi	33	7	21.2%	Ryokan	22	31.4%
Shimonoseki	27	10	37.0%	Pension	5	7.1%
Kurashiki	27	9	33.3%	Public	15	21.4%
				Accommodation		
				Other	1	1.4%
	235	70	29.8%		70	

Table 16: Survey statistics (compiled by author)

Important information on these accommodations is the ratio of foreign guests. There is a connection with the overall tourism statistics, and apart from Takayama, most of the accommodations have a low ratio of foreign guest. This data cannot show the trend, which is visible in the destinations' statistics, that while the ratio is mostly still low, it is on a sharp rise.

Ratio of foreign guests	0-19%	20-39%	40-59%	60-79%	80-100%
Ojika	3				
Tsuwano	7				
Hagi	9				
Takayama	7	5	3	5	4
Onomichi	4	3			
Shimonoseki	8	1	1		
Kurashiki	3	5	1		
	41	14	5	5	4
	59.4%	20.3%	7.2%	7.2%	5.8%

Table 17: Inbound ratio of Accommodations (compiled by author)

5.2.2. Survey results

The results of the survey are summarized in the following, separated by Tourism General, concerns towards inbound tourism, environment and attitude towards inbound tourism.

Tourism industry

Topics about the overall tourism are brought up, with a concentration on market change, workforce and modernisations.

	Declining tourist numbers				Changing demography and demands of tourists			
	Not a problem		Big problem		Not a problem		Big problem	
Ojika	33%	33%	33%	33%	33%	33%	33%	
Tsuwano		14%	86%	17%	50%		33%	
Hagi	11%	11%	44%	33%	44%	11%	44%	
Takayama	35%	4%	39%	22%	5%	50%	32%	14%
Onomichi	14%	29%		57%	17%	50%	33%	
Shimonoseki	44%	22%	22%	11%	56%	22%	22%	
Kurashiki		22%	33%	44%	11%	44%	44%	
	22%	12%	30%	36%	16%	42%	27%	16%

	Seasonal fluctuation				Changing tourism market structure (net reserve.)			
	Not a problem		Big problem		Not a problem		Big problem	
Ojika	33%			67%	67%	33%		
Tsuwano	29%		29%	43%	29%	43%	14%	14%
Hagi		33%	33%	33%	29%	29%	29%	14%
Takayama	18%	23%	41%	18%	14%	36%	23%	27%
Onomichi	14%	14%	43%	29%	29%	29%	29%	14%
Shimonoseki	22%	22%	44%	11%	33%	33%	33%	
Kurashiki		22%	67%	11%	22%	67%	11%	
	15%	20%	41%	24%	25%	39%	22%	14%

Table 18: Survey results, the tourism industry (compiled by author)

The first set of questions concentrate on the overall tourism industry, with declining tourist numbers, seasonal fluctuations, changing tourist demography and market conditions.

The results show that declining tourist numbers and seasonal fluctuation are considered as a difficulty in most of the destinations, with 30% for moderate and 36% for a serious problem, and 41% and 24% for seasonality respectively.

Seasonality especially seems to have a definite but moderate impact on most of the destinations, with Ojika and Tsuwano being impacted the most.

According to the answers, changing tourism market structure (internet reservation, sharing industry) and the changing demography and demands of tourists is something that the establishment can manage themselves in most of the cases. According to the short conversations with the managers, in smaller communities the sharing industry is not as developed as in big cities, thus the industry members don't feel the pressure of having to adapt to the new trends, and while the tourists are getting older with the rest of the population, their needs and expectations seem to remain mostly the same.

	Not a problem		Big problem		Not a problem		Big problem	
	Shortage of workforce fulltime	Shortage of workforce to employ part-time	Shortage of workforce to employ fulltime	Shortage of workforce to employ part-time	Shortage of workforce fulltime	Shortage of workforce to employ part-time	Shortage of workforce to employ fulltime	Shortage of workforce to employ part-time
Ojika	33%	33%	33%	33%	33%	33%	33%	33%
Tsuwano	14%	29%	57%	14%	71%	14%	14%	14%
Hagi	27%	9%	41%	13%	13%	75%	33%	33%
Takayama	27%	23%	9%	19%	24%	24%	33%	33%
Onomichi	14%	43%	43%	14%	29%	14%	43%	43%
Shimonoseki	22%	22%	33%	22%	11%	44%	22%	22%
Kurashiki	11%	44%	22%	33%	44%	22%	22%	22%
	17%	18%	20%	17%	22%	27%	34%	34%
	Not a problem		Big problem		Not a problem		Big problem	
	Shortage of chefs and other skilled workforce	Ageing workforce	Shortage of chefs and other skilled workforce	Ageing workforce	Shortage of chefs and other skilled workforce	Ageing workforce	Shortage of chefs and other skilled workforce	Ageing workforce
Ojika	50%	50%	33%	33%	33%	33%	33%	33%
Tsuwano	33%	33%	33%	17%	50%	33%	33%	33%
Hagi	13%	38%	13%	38%	100%	38%	38%	38%
Takayama	52%	10%	14%	27%	18%	23%	32%	32%
Onomichi	43%	29%	29%	29%	14%	14%	43%	43%
Shimonoseki	67%	22%	11%	33%	22%	22%	22%	22%
Kurashiki	20%	20%	40%	75%	13%	13%	13%	13%
	41%	16%	17%	29%	14%	19%	38%	38%

Table 19: Survey results, workforce (compiled by author)

The second set of questions is around the theme of the workforce, which is

generally considered as difficulty in Japan's tourism industry. The shortage of workforce is especially troublesome in the smaller and faster ageing communities such as Ojika, Tsubano and Hagi, with moderate problems in middle-sized cities, and only growing Kurashiki seems to have fewer problems connected to this topic. The already employed workforce's ageing follows the same pattern.

While the search for new employees seems to be difficult, skilled labour (such as chefs) is scarce in the largest city of Kurashiki, selected as "not a problem" in 41% overall.

	Not a problem		Big problem		Not a problem		Big problem	
	No successors				Building modernisation			
Ojika	67%		33%		67%		33%	
Tsubano	50%	50%			17%	33%	50%	
Hagi	50%		25%	25%	22%	56%	22%	
Takayama	41%	14%	18%	27%	9%	17%	43%	30%
Onomichi	50%	33%		17%	29%	14%	57%	
Shimonoseki	44%	11%	11%	33%	44%		33%	22%
Kurashiki	38%	38%	13%	13%	33%	22%	22%	22%
	45%	19%	13%	23%	20%	15%	39%	26%
	Not a problem		Big problem		Not a problem		Big problem	
	Amenity modernisation				Inbound tourism			
Ojika	67%		33%		67%		33%	
Tsubano		17%	83%		20%		80%	
Hagi	11%	33%	44%	11%	11%	33%	56%	
Takayama	32%	23%	36%	9%	47%	24%	29%	
Onomichi	29%	29%	43%		33%	17%	33%	17%
Shimonoseki	44%	22%	11%	22%	44%	44%	11%	
Kurashiki	11%	67%		22%	78%	11%	11%	
	26%	29%	32%	12%	43%	22%	31%	3%

Table 20: Survey results, modernisation and inbound (compiled by author)

The future development and modernisation is the theme of the last set of questions from this part of the survey, starting with a difficult question of successors for the business. Surprisingly this is not considered as a problem by the respondents as the population data would suggest.

Looking at the data, Ojika seems to be quite positive on the future of the local tourism industry, not considering a successor to the business and modernisation as a problem, but this is because the establishments which did send back the filled out survey, were created less than eight years ago. In the case of Ojika,

while this survey can portray the difficulties connected to the workforce and inbound tourism, this set of questions concentrating on the modernisation and future of the establishment give back results that cannot fully represent the local industry. Some of the accommodations with owners in their 80's did not have a fax machine, not to mention email, thus their opinion is not visible in this survey (no answer sheet came back from 8 of the accommodations, only from the three establishments with younger owners).

Apart from Ojika, while successors are not a problem, building and amenity modernisation are difficulties for traditional destinations with older establishments (Tsuwano, Hagi, Onomichi and Takayama), similarly to inbound selected as difficulty in the same destinations, except Takayama.

Takayama was designated as an inbound tourism example by the Japanese government, and many development projects have been started that are not present in other destinations. While these projects can help with the overall attitude and approach towards inbound tourism as well as support amenity modernisation, building modernisation is still something that has to be addressed.

17	Declining tourist numbers
11	Seasonal fluctuation
10	Changing demography and demands of tourists
8	Shortage of workforce to employ fulltime
8	Building modernisation
7	Changing tourism market structure (sharing economy, etc.)
5	Ageing workforce
4	Shortage of workforce to employ part-time
3	Inbound tourism
2	Amenity modernisation
1	Lack of successors

Table 21: Survey results, support for the tourism industry (compiled by author)

Inbound tourism

The questions regarding inbound tourism are grouped into 12 questions similarly to the general tourism question. The wording of the questions is instinctively written in a way that either past experience or concern of future occurrence is accepted, thus accommodations without foreign guest as well as accommodations with a high ratio of foreign guest can answer the same question.

	Not a problem		Big problem		Not a problem		Big problem	
	Concern of difficulty communicating with foreigners				Shortage of workforce speaking foreign languages			
Ojika	50%		50%		50%		50%	
Tsuwano	14%		71%		57%		43%	
Hagi	33%		11%		33%		67%	
Takayama	41%		14%		17%		30%	
Onomichi	29%		14%		29%		14%	
Shimonoseki	40%		10%		20%		40%	
Kurashiki	11%		67%		11%		67%	
	27%		21%		15%		24%	
	32%		20%		31%		30%	
	Not a problem		Big problem		Not a problem		Big problem	
	Increased costs of workforce speaking foreign languages				Promotion to foreigners			
Ojika	50%		50%		50%		50%	
Tsuwano	14%		14%		29%		57%	
Hagi	22%		33%		11%		22%	
Takayama	26%		43%		36%		36%	
Onomichi	50%		33%		29%		43%	
Shimonoseki	30%		40%		20%		10%	
Kurashiki	56%		22%		22%		11%	
	32%		35%		24%		27%	
	20%		14%		36%		12%	

Table 22: Survey results, communication and workforce (compiled by author)

Communicating with foreigners and having foreign language-speaking staff is a topic that accommodation owners and managers are concerned about in smaller destinations such as Ojika, Tsuwano and Hagi, but even in some larger cities such as Onomichi. Shimonoseki, Kurashiki and Takayama with a longer history of foreign trade and international visitors seem to have smaller problems with this issue.

While foreign language speaking staff is scarce, increased costs of such workforce do not seem to impact establishments, either because these employees are paid the same, or the difference is not substantial.

Promotion is an issue in most of the destination, with the exception of Takayama and Onomichi.

	Concerns of troubles during Check-in/out				Concerns of troubles during payment			
	Not a problem		Big problem		Not a problem		Big problem	
Ojika	50%	50%			100%			
Tsuwano	14%	43%	43%		43%	57%		
Hagi	33%	33%	22%	11%	44%	44%		11%
Takayama	48%	16%	24%	12%	50%	18%	27%	5%
Onomichi	29%	14%		57%	29%	29%	29%	14%
Shimonoseki	40%	50%	10%		50%	30%	20%	
Kurashiki	56%	22%	22%		33%	67%		
	41%	28%	20%	12%	45%	35%	15%	5%

	Uncertainty of regulations connected to ID and passport handling				Creating multilingual signs in the establishment			
	Not a problem		Big problem		Not a problem		Big problem	
Ojika	100%				50%	50%		
Tsuwano	43%	57%				29%	29%	43%
Hagi	44%	33%	11%	11%	22%	22%	44%	11%
Takayama	45%	36%	14%	5%	32%	45%	14%	9%
Onomichi	43%	29%	14%	14%	29%	43%		29%
Shimonoseki	50%	40%	10%		50%	10%	40%	
Kurashiki	89%	11%			44%	44%		11%
	53%	33%	9%	5%	32%	35%	20%	14%

Table 23: Survey results, Check-in/out process (compiled by author)

While communication and finding foreign language speaking workforce is difficult, the establishments in most of these destinations feel comfortable about the Check-in/out, payment process as well as the regulations connected to passport and ID of foreigners, from abroad or living in Japan.

Accommodations in smaller communities seem to have difficulty with creating a multilingual environment in the accommodation. During the short conversations with the owners and managers of Tsuwano and Hagi, the explanation for this is that there are not too many English speaking Japanese or foreigners in these communities, and the few English teachers who are there, do not speak Japanese well enough to understand the needs of the establishments. On the other hand, Takayama had various initiatives in the past, aiming for English education of the industry members and sign translations. This is partly the result of the inbound tourism destination designation from the Japanese government.

	Not a problem		Big problem		Not a problem		Big problem	
	Concerns how to show hospitality to foreigners				Difficulty meeting demands connected to allergies and religious restrictions			
Ojika	50%	50%			50%	50%		
Tsuwano	14%	29%	57%		29%	29%		43%
Hagi	33%	44%	22%		11%	33%	33%	22%
Takayama	36%	41%	23%		27%	41%	9%	23%
Onomichi	33%	50%	17%		17%	50%	17%	17%
Shimonoseki	30%	40%	20%	10%	30%	40%	30%	
Kurashiki	44%	22%	33%		11%	33%	56%	
	34%	38%	26%	2%	23%	38%	22%	17%

	Not a problem		Big problem		Not a problem		Big problem	
	Concerns of causing trouble to other guests				Onsen manners, Manners during dinner			
Ojika	50%	50%			50%	50%		
Tsuwano	33%	17%		50%	29%	29%		43%
Hagi	22%	33%	11%	33%	13%	50%	25%	13%
Takayama	22%	43%	26%	9%	33%	29%	25%	13%
Onomichi	57%	29%	14%		50%	33%	17%	
Shimonoseki	50%	20%	20%	10%	67%	22%	11%	
Kurashiki	22%	78%			17%	83%		
	32%	39%	15%	14%	35%	37%	16%	11%

Table 24: Survey results, hospitality and manners (compiled by author)

Lastly, hospitality and manners are the topics of the next group of questions. While most of the establishments are confident in their skills to convey the Japanese *omotenashi* (hospitality), which includes the grand dinners of a ryokan, and there seem to be little problems with foreigners' manners, Tsuwano is standing out in all of the four questions. Further interviews might be necessary to understand the underlying reason for this pattern.

Total	
17	Promotion to foreigners
13	Shortage of workforce speaking foreign languages
8	Creating multilingual signs in the establishment
5	Difficulty meeting demands connected to allergies and religious restrictions
5	Onsen manners, Manners during dinner
4	Concerns of troubles during Check-in/out
3	Concerns of difficulty communicating with foreigners
3	Concerns of causing trouble to other guests
2	Increased costs of workforce speaking foreign languages
2	Uncertainty of regulations connected to ID and passport handling

Table 25: Survey results, support for inbound tourism (compiled by author)

Foreign friendly environment

The third part of the survey is concentrating on the foreign-friendly environment of accommodations with a few simple questions. In the research paper, we are concentrating on the topic that were found important in the satisfaction survey of governmental agencies, such as English communication, payment methods and available Wi-Fi service.

	Always present	Sometimes	None
Ojika	33.3%	33.3%	33.3%
Tsuwano		28.6%	71.4%
Hagi	22.2%	55.6%	22.2%
Takayama	62.5%	12.5%	25.0%
Onomichi	14.3%	57.1%	28.6%
Shimonoseki	20.0%	50.0%	30.0%
Kurashiki	44.4%	44.4%	11.1%
Total	36.2%	34.8%	29.0%

Table 26: English speaking staff (compiled by author)

The survey showed that Tsuwano has the lowest ratio of accommodation with no English speaking staff. While the average seems to have at least “sometimes” employees in the establishment who can communicate with foreigners, and Takayama can be seen as the leader in this topic. This quite high percentage can be the result of English conversation clubs, which the locals started to participate in (Funck, 2012).

	Available	Not available
Ojika	33%	67%
Tsuwano	29%	71%
Hagi	89%	11%
Takayama	83%	17%
Onomichi	57%	43%
Shimonoseki	80%	20%
Kurashiki	67%	33%
Total	71%	29%

Table 27: Credit (debit) card acceptance in accommodations (compiled by author)

The credit (debit) card acceptance is fairly high in general, as 71% of the total combined establishments have this service, with Tsuwano and Ojika on the other

side of the scale with more than 2/3 of without such cashless payment method.

	Lobby only	Lobby and rooms	in	None
Ojika		33.3%		66.7%
Tsuwano	14.3%	71.4%		14.3%
Hagi	22.2%	66.7%		11.1%
Takayama	8.3%	87.5%		4.2%
Onomichi	14.3%	57.1%		28.6%
Shimonoseki	20.0%	70.0%		10.0%
Kurashiki		100.0%		
Total	11.6%	76.8%		11.6%

Table 28: Wi-Fi availability in the accommodations (compiled by author)

Wi-Fi is a part of the services where Tsuwano is almost on the average level of the destinations that were part of this survey. With the rising number of rentable portable Wi-Fi routes, more and more cities with public access and accommodations that seem to have already invested into this amenity, the travel of the foreign tourists will be easier, with smooth access to information.

Inbound tourism is an important export/income for the Japanese economy				
	I think so		I don't think so	
Ojika	100%			
Tsuwano	86%			14%
Hagi	67%	22%		11%
Takayama	67%	21%	8%	4%
Onomichi	71%		29%	
Shimonoseki	90%			10%
Kurashiki	89%	11%		
Total	76%	12%	6%	6%

Table 29: Attitude towards inbound tourism, economy (compiled by author)

The attitude towards inbound tourism as an important income for the country is positive, both rural and larger destinations feel that this industry can support not just their local communities but Japan's economy too.

Inbound tourism is a counter measurement against declining domestic tourism				
	I think so		I don't think so	
Ojika	100%			
Tsuwano	86%	14%		
Hagi	67%	22%	11%	
Takayama	75%	21%	4%	
Onomichi	86%	14%		
Shimonoseki	89%	11%		
Kurashiki	89%	11%		
Total	80.6%	16.4%	1.5%	1.5%

Table 30: Attitude towards inbound tourism, domestic tourism (compiled by author)

The growing inbound tourism is an important tool to strengthen the economy of these communities, in the face of shrinking population, and in the long term shrinking domestic tourism,. Some of the destinations above have other industries as well (Shimonoseki has ports, Onomichi shipbuilding and repairing, etc.), but tourism has been an important part of the local economy. While this is going to be important in the long future, even more so than the previous “inbound as income for the country”, accommodations have a positive attitude towards this concept.

Foreigners have a strong interest in Japan culture, and tourism is an important interaction				
	I think so		I don't think so	
Ojika	100%			
Tsuwano	71%	29%		
Hagi	89%		11%	
Takayama	75%	25%		
Onomichi	71%	29%		
Shimonoseki	100%			
Kurashiki	100%			
Total	83.8%	14.7%	1.5%	

Table 31: Attitude towards inbound tourism, culture (compiled by author)

The Japan *omotenashi* (hospitality) where the aim is to give the guests an experience, rather than just supply a room to sleep in might be behind the positive

answers for this question. Most of the accommodations in the destinations agree that the foreigners' interest in Japan's culture is an important part of the tourism experience.

Interaction with foreigners is an interesting experience				
	I think so		I don't think so	
Ojika	100%			
Tsuwano	86%	14%		
Hagi	78%		11%	11%
Takayama	75%	21%	4%	
Onomichi	71%		29%	
Shimonoseki	100%			
Kurashiki	67%	33%		
Total	79.4%	13.2%	5.9%	1.5%

Table 32: Attitude towards inbound tourism, experience (compiled by author)

There seems to be an overall positive feedback on the “experience” of having foreigners, with some minor differences in the destinations. Takayama and Kurashiki might have had a longer history of accepting foreigners, and the novelty wears off after a while. On the other hand, Shimonoseki has a long history of being a port town, where even the few foreigners who did come to Japan in the Edo period stopped over, and Ojika has had a longer history with the *kentōshi* envoys, thus there is a historical and cultural background of communicating with people from abroad.

Will the 2020 Olympic games have an impact on your business				
	No impact			Big impact
Ojika	100%			0%
Tsuwano	43%	43%		14%
Hagi	25%	50%		25%
Takayama	42%	25%	13%	21%
Onomichi	29%	29%	29%	14%
Shimonoseki	50%	30%	10%	10%
Kurashiki	11%	11%	44%	33%
Total	37.3%	28.4%	14.9%	19.4%

Table 33: Survey results, attitude towards tourism (compiled by author)

The last question is connected to the 2020 Olympic Games, and whether it will have any impact on the businesses of these destinations, but more than half of the answers were negative in this question. Among the topics, this was the one with the least positive answers, especially in the rural and small destinations such as Ojika and Tsuwano, the accommodations which are not expecting any growth because of the Olympic Games is very high. While these communities are far away from Tokyo, surprisingly Takayama, the closest and most famous among the destination has a similar attitude, with about 67% of the establishments not hoping for any or significant impact. Kurashiki was the only destination where positive answers reached more than 50% (77%), but all other destinations were well below this line.

Attitude towards inbound tourism is measured through four questions, but an overwhelming number of establishments gave positive answers. Further investigation is needed into the cultural background, to find out how accurately these answers describe the real attitude of these business owners and managers or is there a cultural accepted to answer positively to this kind of questions to avoid confrontations.

5.2.3. Survey summary

This aim of this survey was to collect data on the difficulties that accommodations face in rural communities, especially in connection with inbound

tourism.

The survey of accommodation in heritage destinations showed a complicated picture of the difficulties that these establishments face.

Declining tourism numbers are generally felt throughout the destinations, regardless of the size or location, and strong seasonality has to be addressed by wider tourism industry stakeholders. The changing tourism market with shifting demography of tourists and development of sharing industry and internet reservation does not seem to be of much importance or problem for these establishments.

There are differences according to the size and population structure of the destinations, but the shortage of people of working age to employ and the ageing of currently employed workforce is present as a problem in most cases. Furthermore, shortage of foreign languages speaking workforce was selected by the accommodations as the most severe problem in the inbound section of the survey.

Modernisation of buildings and amenities are somewhat difficult, but successors seem to be something that even the accommodations in smaller communities can solve by themselves.

In connection with the inbound topics, the establishments have concerns communicating and promoting their establishments to foreigners, and the aforementioned foreign language speaking staff, but most of the topics were not deemed as difficult. Similarly, accommodations required help from authorities and tourism association concerning promotion, language speaking staff and signs.

The survey was conducted in 6 destinations from small towns to cities, which gives a vertical representation of the rural tourism industry. This is especially visible in the topics that are related to the size of the community, as workforce-related problems show a different level of severity. In future research, a horizontal approach is needed, conducting the survey in destinations of similar size, to be able to strengthen the generalisation that can be deduced from the data. Similarly, with more respondents and a larger data sample, further analyses can be done on types of accommodations, size of the accommodation, and so forth. The current data sample is not yet large enough to be able to make strong

generalisations, but it is an important starting point, to improve and change the survey format while maintaining compatibility with the already gather data.

The establishments in Tsuwano face similar problems as in other destinations, with some differences. Declining tourist numbers and seasonality was selected as a problem well above the average of the destinations, workforce shortage and ageing is generally the same in similar-sized communities. Building and amenity modernization is a challenge to accommodations in towns with smaller populations, and also inbound tourism shows a difference in destinations size. Creating multilingual signs and meeting demands of allergies and religious restrictions is something that seems to be a difficulty mostly in Tsuwano, as well as concerns towards manner problems. Whether these are experience-based concerns, or on the contrary, concerns without a previous problematic guest, is measured in this survey.

6. Case study: Tsuwano

Tsuwano, compared to the above-introduced reference destinations and the destinations in the literature review, did not achieve success in becoming an inbound tourism destination nor in numbers of recognition. The underlying connection with all the other destinations (reference destinations and literature review) is that there was a significant tourism boom in the second half of the 20th century, creating a solid foundation as an established rural tourism community. This common ground was well used by some (successors) and misused by others. The following introduction and analysis take a closer look at how Tsuwano is different from successful destinations.

6.1. Tsuwano's introduction

This paper aims to collect information from several sources and create a comprehensive description of the destination and its progress towards the inbound-friendly environment.

Tsuwano, as a heritage destination, has not managed to receive attention from tourism researchers and has been only the topic of a few papers (Yonemoto, 2016) (Kikuchi, 2004) (Kurosawa, Soshiroda, & Tsutsumi, 2013). Activates and projects connected to The Important Preservation Districts for Grouping of Traditional Buildings in Tsuwano has been discussed (Kuroyanagi, Fujita, & Hattori, 2017), with minor connection to the use of these buildings in the tourism industry (Kuroyanagi, 2014).

The information from these research papers together with official materials from the local authorities help better understand the town's rise and slow decline as a destination in the past 50 years.

This research aims to evaluate Tsuwano and compare it to reference destinations using a two surveys. The first survey is aiming to understand the foreign-friendly environment of the restaurants, while the second survey is concentrating on accommodations, both indispensable establishments of the tourism industry and the travel experience. The results will be put into context with reference destinations, to clarify whether these values are only specific for

Tsuwano, or whether they are part of a larger trend. Widening the survey to several destinations with similar “heritage” brands gives us more information on Tsuwano’s current situation among tourism destinations.

Tsuwano was chosen for the case study, as a possible example of a destination that after experiencing a sudden domestic tourism boom and slow decline, did not manage to make the transition to an inbound destination. The town hall is putting effort into preserving local cultural assets, and through national and prefectural designation there are already results. These cultural assets are often considered as tourism resources and can be the basis of inbound tourism development, but the question remains whether the local establishments have a similar progressive attitude.

Tourism statistics provide an important look at the destination’s current status. The difficulty with the analysis is that as Carolin Funck explained: “for a country with an elaborate statistical system, Japan’s tourism statistics are surprisingly haphazard.” (Funck, 2012, p. 125).

The visitor numbers available on the prefectural level (provided by the local authorities) do not show the complete detailed picture of the destination, thus further data is needed. Through working together with the local town hall, the aggregated numbers of the “visitors” to Tsuwano is detailed through identifying key attractions and the changes that have occurred in connection with the calculation methods. Furthermore, the accommodation statistics, the guest nights spent in the destination is used to confirm the adjusted visitor numbers.

6.2. Introduction of the destination

Tsuwano Town is located in the south-west part of Shimane Prefecture on Honshu Island of Japan. A small town which even after the mergers in 1955 and 2005 not more than a bit over 7000 residents, and is shrinking as most small towns in Japan (Tsuwano Town, 2016).

Among the older Japanese generation, it is a relatively well-known town, especially in Kyushu and *Western Honshū*, as many have visited it in its tourism boom period. The town’s festivals have a long history and are often broadcasted in the wider area.

6.2.1. Tsuwano's heritage and tourism resources

Tsuwano Domain and Early Meiji period

Tsuwano domain in the Edo period was a small-middle sized domain, but through the introduction of *washi* Japanese paper making industry by the domain lord Kamei, it gained a strong economic background.

The first settlement and fortification on the castle mountain were established by the Yoshimi-clan in 1295, following an ordinance of the emperor to create a defence line against the looming Mongolian threat. Later at the beginning of the Edo period, for a short period of 16 years, Naomori Sakazaki was the domain lord, but the unfortunate *Senhime* incident caused his early death. While Sakazaki was only for a short time in Tsuwano, the present town's outline and the castles reinforcement is connected to his name. After Sakazaki, the Kamei clan was given the responsibility to rule the domain, and they have done so until the end of the Edo period. Continuing the development that Sakazaki has begun, Kamei clan introduced *washi* paper industry, and put an emphasis on education, which resulted in some well-known historical figures coming from Tsuwano.

Kamei's other important influence on today's Tsuwano tourism destination was that they managed to preserve the town centre in the turbulent and often devastating times of the end of the Edo period, beginning of Meiji period. Kamei was a supporter of the new Meiji government and convinced the coming Chōshū armies to fight the opposing forces in Hamada (Shimane Prefecture) rather than in the mountainous area of Tsuwano. While there were no armies fighting in Tsuwano, fires often destroyed the town, the last one just before the end of the Edo period, in 1853. The old traditional merchant homes rebuilt after the fire are now part of a townscape preservation area (Okimoto, Tsuwano domain, 1974).

Festivals and shrines

During Tsuwano's 700 year history, several festivals were born, that are still held even today, creating the brand of Tsuwano, Little Kyoto of Sanin.

The first of the major events is the Yabusame horse riding festival on the second Sunday of April, at Washibara Hachimangu Shrine, a nationally designated Important Historic Building. While there are many places in Japan

where Yabusame is performed, Tsuwano has the only remaining original horse archery grounds in the country.

Built in 1567 by the Yoshimi-clan, it was preserved by the local community and received prefectural designation as Historic Landmark in 1966. The festival is also important because the long-standing horse archery clan of Ogasawara from Kamakura comes to perform the Yabusame. The combination of original horse-riding grounds, a horse archery clan going back 32 generations and the sakura cherry blossoming attracts both Japanese and foreigners from close and far away (Tsuwano, destination after a tourism boom, 2019).

The second festival is the Sagimai Heron Dance on the 20th and 27th of July. This tradition originates from the Kyoto Gion Festival, which was first introduced to the repertoire of Yamaguchi's Ōuchi clan, and later to the neighbouring Tsuwano in 1542. It has been performed every year since 1644 when the Kamei clan restarted it after Sakazaki's ban.

The dance received the Important Intangible Folk Cultural Property designation on the national level in 1994. The tradition of the dance was discontinued in Kyoto for several decades, but with the help of Tsuwano's dancers it was revived in the 20th century. The festival is shown on major news programs all over the country every year, helping to preserve the brand of Tsuwano. Together with the Sagimai Heron dance, elementary school children perform on the same day a Kosagimai (young heron dance), a tradition started in 1958 in order to familiarise young children with the local customs (Yadomi, 1974).

The *Tsuwano Odori* (*obon* dance) festival in August is a bit different from the obon dances of other communities. It has a slow pace and a black hood covering the face as part of the costume of the dancers. This is to commemorate a clever strategy of the Kamei clan, which they used to take over a strong castle, that otherwise would not have been possible.

After The Kamei Clan moved to Tsuwano in 1616, it has been performed every year and is one of the festivals where the visitors can participate. After a short dance lesson, they are given black hoods (as presents) and join the dance. The few foreigners who do find their way to Tsuwano started calling it the ninja-dance, which is a reference to the strategy that it commemorates. This dance has been

recognised as prefecture designated Important Intangible Folk Cultural Property in 1962 (Tsuwano Town, 2018a).

Kagura, a dance-theatre entertainment for the deities is part of the wider regions traditional culture, with differences in the performance in Hiroshima and across Iwami region (South-west Shimane prefecture). This traditional performance has been designated as Japan Heritage in 2019, with many communities involved, one of them being Tsuwano. The performances are held during the summer every weekend, often connected to the festivals. It is a lesser-known part of the Japanese culture by foreigners and has great potential in terms of “discovering” new experiences in rural Japan (Agency of Cultural Affairs, 2019).

Taikodani Inari Shrine was established in 1773 by the lord of the domain to ask for the deity to protect the castle. It is connected to the famous Fushimi Inari-Taisha in Kyoto and has the same 1000 tori gate path to the entrance, which is popular with tourists. The shrine is the 5th most important Inari shrine in Japan, and still attracts people living in the surrounding towns and prefectures. During the interviews with local officials, a tourism division employee summarised the town’s tourism as “Tsuwano is Taikodani Inari Shrine” (Taikodani Inari Shrine, 2018).

The busiest time for the shrine is the *hatsumode* or first visit to a shrine at the start of the year. From the 1st of January to the 3rd, somewhere between 100’000 and 200’000 pilgrims visit Tsuwano, a small town of 2500 (town centre, area before the merger). The shrine attracts a large number of visitors, but it has been on a slow declining slope, from the 966’295 visitors in 2000 to 592’985 visitors in 2017, a fall of 38.6% (Tsuwano Town, 2018b).

A more recent “festival” is the Otome Touge “festival” on the 3rd of March, a march of Christians with participants from across Japan and even from abroad. While the Japanese word for this event is *matsuri*, which is often translated into “festival”, the world might not be suitable translation due to the history behind the march. The beginning of the Meiji period saw a fierce crackdown on the Christians, especially in Nagasaki, where a large number of them were captured and arrested. The government sent these Christians to different parts of the country, for “persuasion to changing their fate”. Tsuwano also had to obey the orders of

the central government and took in 154 Christians. They were tortured for years before set free, in part because of the international pressure to Japan to stop the prosecution. Not all Christians have survived the harsh circumstances, and a handful have died a martyr's death. Saint Maria is said to have come to one of the prisoners, and the place where the Christians were kept is being considered by the Vatican to be designated as "holy land, a place of a miracle". The festival is on the "day of the constitution" (3rd of March), and the possible designation by the Vatican raises the topic of another type of pilgrimage tourism in the town (Okimoto, 1971).

Famous people from Tsuwano

The Kamei clan invested not just into industries such as the washi paper making (which was inscribed in 2014 as UNESCO World Heritage in other cities) but also into education, and built the Yorokan domain school. While the list of the people who have learned there and achieved high positions is long (such as the first governor of Hokkaido, the first principal of Hokkaido University, etc), there are some worth mentioning related to tourism.

Nishi Amane and Mori Ougai are two prominent names, the latter becoming the highest-ranking doctor in the Japanese army and also a well-known novelist, whose works are taught in every school in Japan. While there are other names, these two individuals were important enough for the locals to preserve their old residences, and in Mori's case, build a rather spacious museum called Mori Ougai Memorial Hall. This museum is a must-have-stop for every bus tour and many independent tourists. While Mori has many museums across Japan (Kokura, Tokyo, etc.), Tsuwano still takes pride that it is here, he was born and started attending school.

A lesser-known fact is that famous "*Otoko wa Tsurai yo*" tv series used Tsuwano as a location in its 13th episode. The series is widely known by almost every Japanese who was born before 1990, thus creating an opportunity for content tourism. Sadly it has not been advertised by the locals as such, and the time is running out, as the new generation of Japanese is not familiar with this TV show.

Mitsumasa Anno, a world-renowned artist, is a more recent individual who calls Tsuwano his home, or at least his *furusato* (home town). While his health is fragile, he visits Tsuwano and the museum erected in his name every year. The visitors to this attraction is slowly declining, but it is still one of the important sightseeing stops of Tsuwano.

SL Yamaguchi

SL Yamaguchi is a 62km long steam engine pulled nostalgic train ride, from the Shinkansen bullet train station Shin-Yamaguchi in Yamaguchi Prefecture to Tsuwano Town. The train starts just before 11am from Shin-Yamaguchi and reaches Tsuwano before 1pm. The engine is turned around and filled up with water and coal, and after the long stop in Tsuwano, it heads back to Shin-Yamaguchi just before 16pm. Tsuwano has the only remaining turntable for the steam engine on the Yamaguchi line, which was an important part of the SL Yamaguchi's resurrection in 1979 (Yonemoto, 2016). Crowds come to see the locomotive, not just the average tourist, but the fan base of trains and steam locomotives, which gives the majority of the repeaters on these weekends.

The service was halted for more than a year when a train bridge was washed away in an especially heavy rainfall in (July of 2013), and again service was suspended for several months after the record-breaking heavy rainfall that washed away train tracks in Hiroshima in 2018. During interviews with the local businesses, many have emphasised that without the SL Yamaguchi, probably they would have to close down their shops. This shows the vulnerability of the tourism industry, which after a long stagnation might be at the verge of collapse, and is held up by a few important attractions, such as the SL Yamaguchi

Castle ruins

Tsuwano was established as part of the defence line against the looming Mongolian attack, and the first earth-wall fortification was created in accordance with a central ordinance, around 1295. The Yoshimi clan was entrusted with this responsibility, and they chose this area because of the terrain, a mountain surrounded on three sides by the river. The stone foundations and walls that can still be seen on the mountain were created by Sakazaki between 1600 and 1616

and extended by the Kamei clan afterwards.

The *tenshukaku* (main tower) burned down early in the Edo period (1684) and was not rebuilt due the central governments fear of emerging rural powerful feudal lords. The rest of the buildings were demolished in the first years of the Meiji period after the central government's order. Tsuwano had the 4th highest attitude difference castle and is registered in the list of 100 best castles (and remains) of Japan. A magnificent view can be seen of the surrounding area and the former castle town underneath. A chair-lift brings the visitors up the top of the hill (Okimoto, Tsuwano domain, 1974).

Japan Heritage

Tsuwano was designated as Japan Heritage in 2015, and again in 2019, which is an important opportunity for domestic and inbound tourism, but also for raising awareness and recognition of the uniqueness of their heritage among the locals.

The above mentioned Japan Heritage designation system was created by the Agency of Cultural Affairs in 2015 to “revitalise local communities through comprehensive maintenance and utilisation of these attractive tangible and intangible cultural properties and their strategic promotion in Japan and overseas.” (Agency of Cultural Affairs, 2015) . The base of the designation is a story, often used in a series type, where several towns and cities are connected through a story, industry or other types of heritage, and are designated together. In Tsuwano's case, the heritage story was sufficient enough to be designated on its own, and also to create a facility to introduce this narration to both the visitors and the locals.

Tsuwano's old merchant houses and townscape remains in a small part of the town and can also be seen in old paintings created 100 years ago, showing how Tsuwano was 150years ago. The paintings titled “Tsuwano Then and Now: Exploring the Town of Tsuwano Through the One Hundred Landscapes of Tsuwano”, consists of not just the paintings but are accompanied with a detailed description which helped find the location and gave an explanation of the life at the end of the Edo period in Tsuwano. As mentioned earlier, with the forces of Chōshū domain going straight to Hamada to engage the enemy, the scenery of

these spots are preserved as they were.

The second designation, together with a number of towns in the area, was the aforementioned theatre-like *kagura* in 2019. Similar to the UNESCO registered Washi Japanese papermaking, *kagura* is a tradition not in only one town, but in the wider region. In the case of the washi paper, the UNESCO registration is somewhat “limited” to Hamada town, even though Tsuwano has an equally long industrial history and as mentioned before, washi played a significant role in the prosperity of the domain. The *kagura* Japan Heritage designation, on the other hand, is a group designation, connecting these communities with the same heritage and encouraging cooperation and communication (Tsuwano Board of Education, n.d.).

Townscape tourism

Tsuwano’s old merchant centre has still a lot of the traditional buildings remaining, taken care of by the local community. Avoiding the fearsome battles in the transition between the feudal Edo period and the modern Meiji period (around 1868), being spared by bombings in the second world war and not having enough economic power in the middle of the 20th century to modernize, lead to a well preserved townscape, that has been designated as Preservation District for Groups of Traditional Buildings in 2013.

The community and local authorities have had activities and groups have undertaken preservation projects since the middle of the 20th century, such as the purposeful position of the train stations, so visitors have to walk through the town centre towards the Taikodani Inari Shrine (Iwatani, 1978), and the resident opposition against constructing the Route 9 through the town centre, destroying the preserved atmosphere. The official designation in 2013 of the central government gave these projects a framework and budgets to help coordination and preservation. Such preservation districts often take central part in the development of a destination, leading to well-know examples of heritage tourism such as the later introduced Takayama City (Gifu Pref.), Hagi City (Yamaguchi Pref.) and Takehara (Hiroshima Pref.). In the case of Tsuwano, while the town was previously already known for old townscape, this recognition has arrived

somewhat late.

6.2.2. Population

The ageing of the Japanese population is a transformation of the society that has an impact on every industry and every community. Tsuwano and its tourism industry is not an exemption from this.

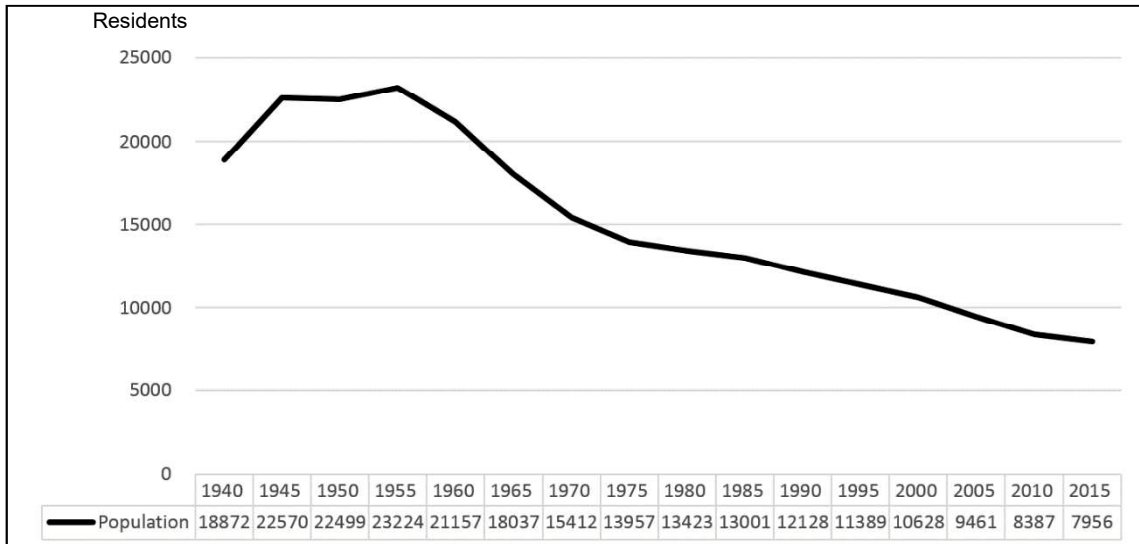


Figure 13: Tsuwano's population (compiled by author based on Tsuwano Town (2016))

The population peaks at 23'224 in 1955, and start a slow and steady decline over the decades. The population in 2015 is 7956, or 34.3 % of the 1955's peak population.

The next figure (Figure 14) shows us the change compared to the national and prefectural average. Tsuwano, similar to many other rural towns and villages, is struggling not just with the natural shrinking, but with a migration towards the big cities.

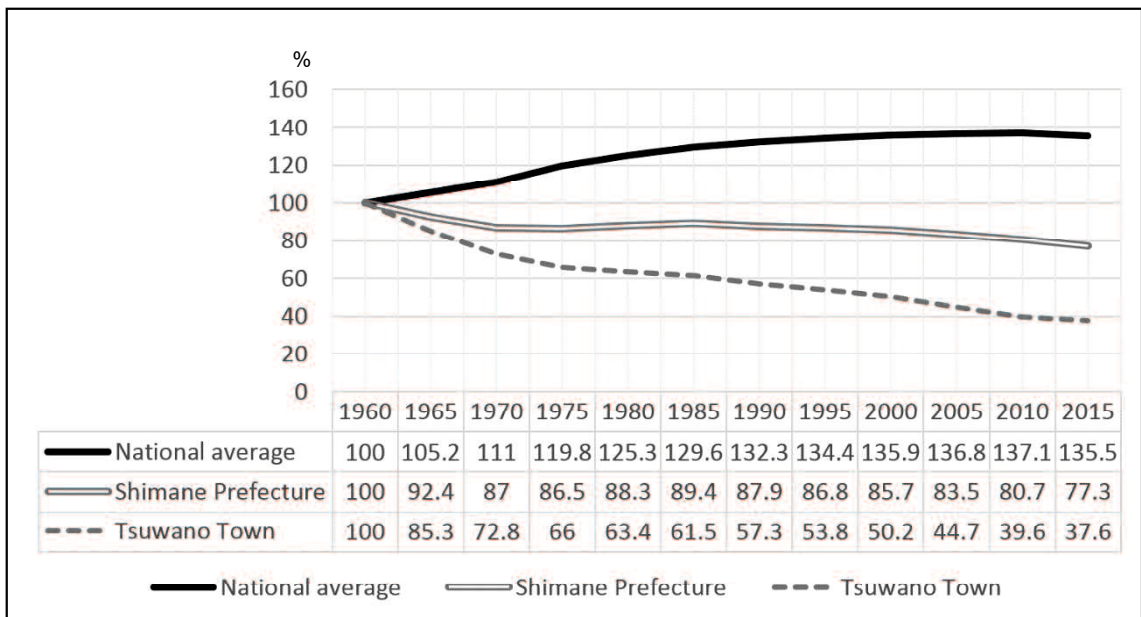


Figure 14: Population change of Tsuwano Town, Shimane Prefecture and the national average (1960=100%). (compiled by author based on Tsuwano Town (2016))

The change in the community age structure can be seen by dividing statistics into three groups. As the graph (in Figure14) clearly shows, the working population (age from 15 to 64) and young (age 14 and bellow) groups are declining from 1980 to 2015, while the aged population (age 65 and above) is slowly growing.

The industry in Tsuwano already feels the shortage of workforce, as some accommodations hail employees from Hagi and other neighbouring cities, with above-the-average hourly wages and other financial and non-financial support.

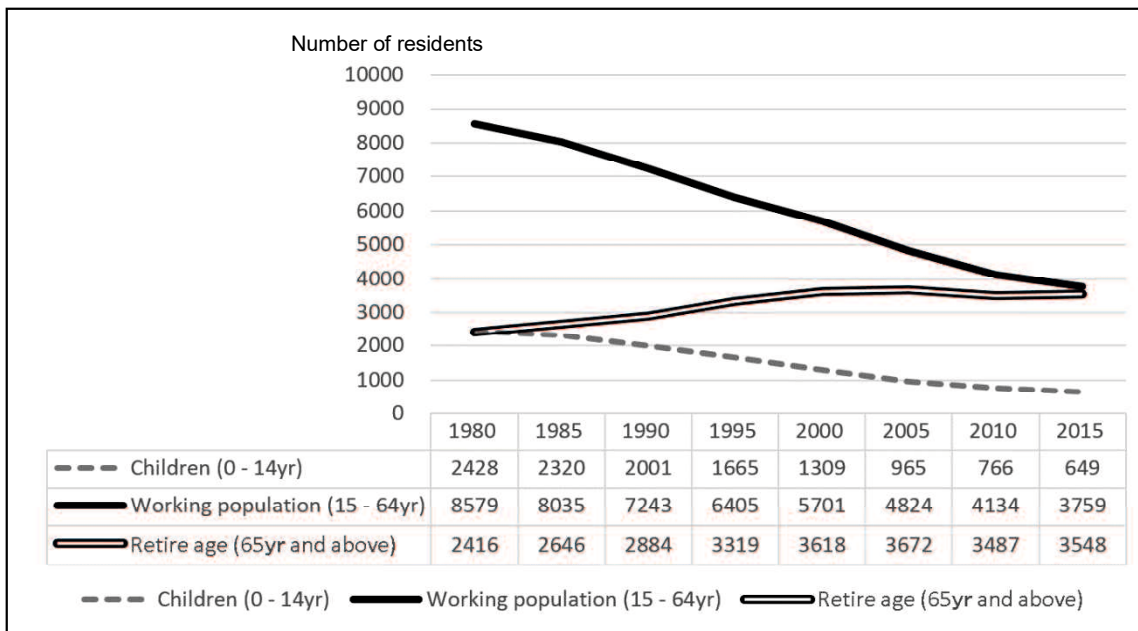


Figure 15: Tsuwano's population change by age group. (compiled by author based on Tsuwano Town (2016))

6.3. Tourism statistics and attractions

6.3.1. Statistics

Tsuwano is a small castle town in the western part of Shimane prefecture, with a population of 7'266 (as of April of 2018), and a population density of 24 residents/km² (Tsuwano Town, 2016).

Tsuwano experienced a tourism boom starting from 600'328 visitors in 1967 and peaking in 1979 with 1'520'275 tourists coming to the small castle town. The official data shows a short fall, followed by a prolonged stagnation from 1'250'200 in 1985 to 1'222'000 in 2002. Afterwards, there seems to be a little bit more fluctuation in the numbers, but it is hovering around the 1'200'000 mark (Tsuwano Town, 2018b).

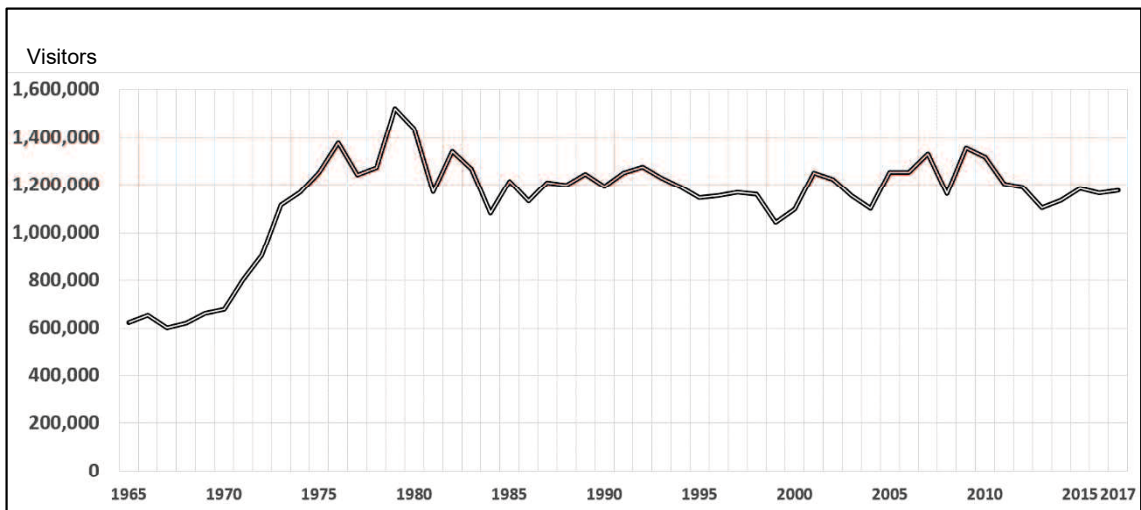


Figure 16: Tourism visitor numbers. (compiled by author based on Visitor numbers Tsuwano Town (2018b))

Referring back to the Tourism Area Life Cycle, Tsuwano seems to have experienced a straightforward development from the starting “exploration” stage, through “involvement”, “development” and “stagnation” stages in a relatively short time. The stagnation period has some sharp changes, but in general, turns towards a decline (1980 - 1985), and returns to stagnation (1985 onwards).

This is the official “visitors” data from the Tsuwano Town, the same numbers that have been provided to the prefecture. However, as Carolin Funck explained in 2012, “Japan’s tourism statistics are surprisingly haphazard.” (Funck, 2012, p. 125), and a closer examination is needed. Although a lot has improved in the past years in terms of statistical data gathering, the working experience at the local town hall was essential in drawing a more detailed picture.

The above mentioned “visitors” data does not correctly show the actual numbers, as the calculation method changes often. Furthermore, with the personal rotation inside the town hall, the person in charge of the statistics changes every 2 or 3 years, and the older methods are not documented. For a better understanding, some long-standing tourism attractions were selected to compare their performance in the past years.

Main attractions

Data is available for attractions from the year 2001, and the following graph (in Figure 17) shows the changes with 2001 as a base year. The selected attractions

are the Taikodani Inari Shrine, Tsuwano Kyodokan Museum, Tsuwano Castle Ruins chairlift, Mori Ougai Memorial Hall, Anno Mitsumasa Art Museum and the Tsuwano Folklore Museum. Other attractions will be discussed later.

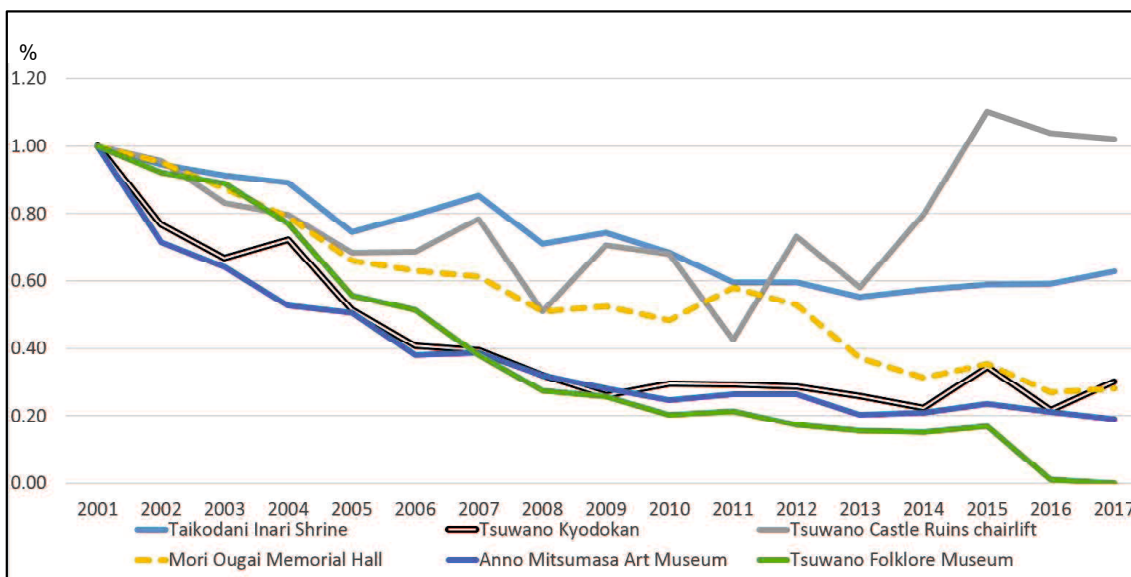


Figure 17: Visitor number change by attractions. (compiled by author based on Shimane Prefecture (2008 - 2018))

The data shows that apart from the chairlift to the castle ruins, most of the attractions have been steadily losing visitors in the years between 2001 and 2017. While the chairlift had a short popularity growth since 2011, the absolute numbers compared to the Taikodani Inari Shrine are small. Putting the performance of different attractions into context, the following graph and table (in Figure 18) show the visitor numbers in the same period. The numbers for the Taikodani Inari Shrine and the Total of the attractions on the graph are shown on the right axis for a clearer understanding.

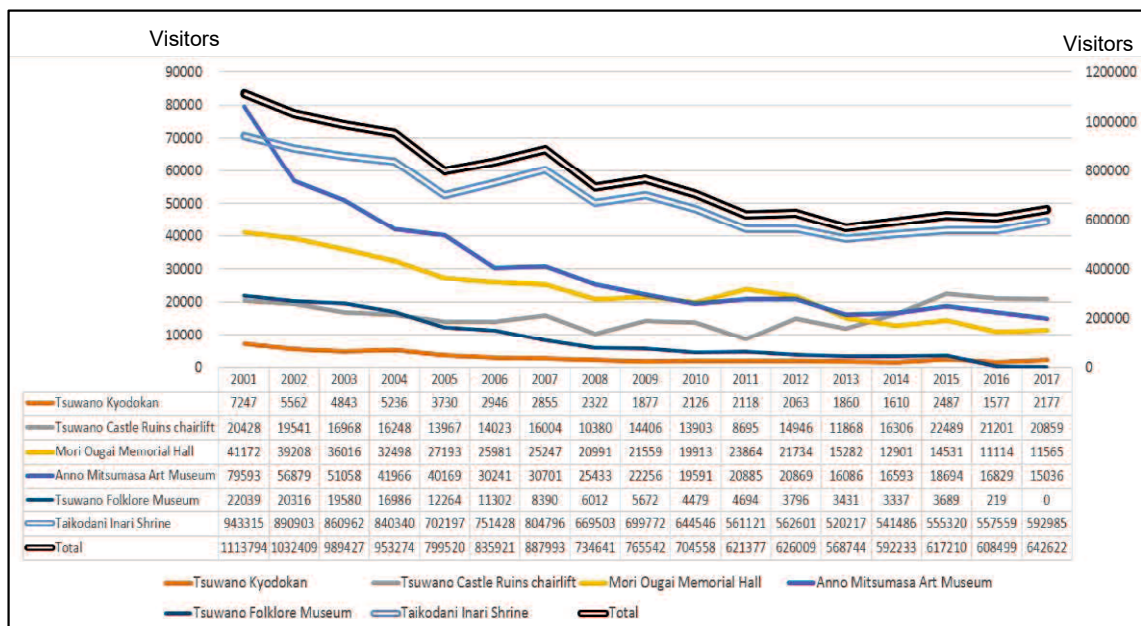


Figure 18: Visitor numbers by main attractions. Right axis for Taikodani Inari Shrine and Total, and left axis for the other attractions. (compiled by author based on Shimane Prefecture (2008 - 2018))

While the popularity of the chairlift mentioned above rose from 2011, its numbers cannot be compared to Taikodani Inari Shrine’s visitors. The previously mentioned statement by the local town hall officer, that “when it comes to tourism, Tsuwano is Taikodani Inari Shrine” was not an understatement, as the 943’315 visitors in 2001 give the majority of the visitors to Tsuwano Town (75.4%). The notable other attractions all together in that year account for only 170’479 of the 1’250’497 or 13.6%. The sum of these main attractions show a slow but steady decline in visitor numbers, which is somewhat different from the official summarised visitor number graph (in Figure16), showing a long stagnation.

Calculation method changes

The attractions that were not listed in the previous graph are posing a difficulty, as the data collection is not consistent in the above mentioned period of 2001 to 2017. One of the problems is that the number of attractions that are summarised in the “visitor” data grew, with some new attractions added to the list.

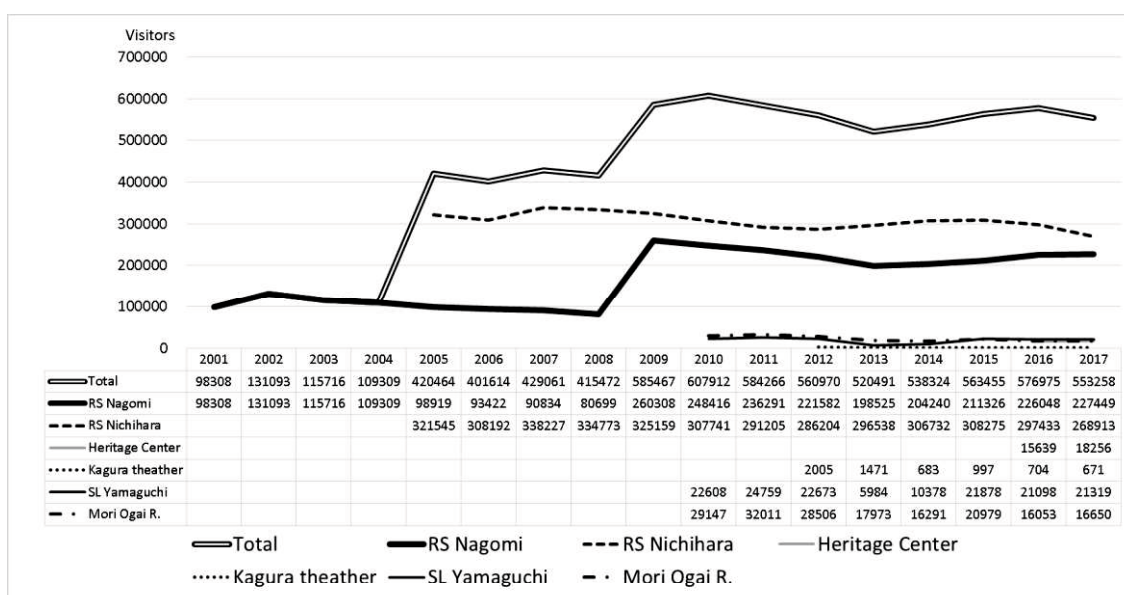


Figure 19: Base for visitor numbers adjustment, new attractions. (compiled by author based on Shimane Prefecture (2008 - 2018))

Tsuwano Japan Heritage Center opened in 2015 (data from 2016), and attracted visitors from 15'000 to 18'000 in the first years. Kagura performances have been added to the statistics in 2012, and SL Yamaguchi steam locomotive service numbers, as well as visitors to Mori Ougai's residence, were also included from 2010. A new roadside station in Nichihara was opened in 2005, raising the numbers by around 300'000 on a yearly basis. In the case of the Roadside Station Nagomi, a sharp rise from 80'699 in 2008 to 260'308 in 2009 can be seen in the dataset. A short interview with the manager of the roadside station revealed, that while only the onsen visitors were counted before 2008, since 2009 the number of customers at the shop of the roadside station is also added to the total. A further change is foreseen, as there are talks of including the cars entering the parking lot of the facility to the statistics.

The result of these changes can distort the performance of a destination. The sum of these newly added attractions and the change of measuring methods can be between 420'000 in 2005 to 706'912 in 2010.

The adjusted visitor numbers are shown in Figure 20. The adjusted graph (in Figure 20) shows the continuation of the original visitors data, namely taking out the new attractions (Figure 19), and only leaving in the attraction that were part of the statistics before 2001. The tourists' interests and behavior changes with

time, and showing only the attractions present from before 2001 might conceal this change, but Figure 19 shows that the “new” attractions do not rise in popularity, but after an initial rise, stay roughly on the same level. The original attraction’s visitor numbers instead of stagnation, indicate a strong decline from 2001 to 2013, and a starting flat line from there onwards.

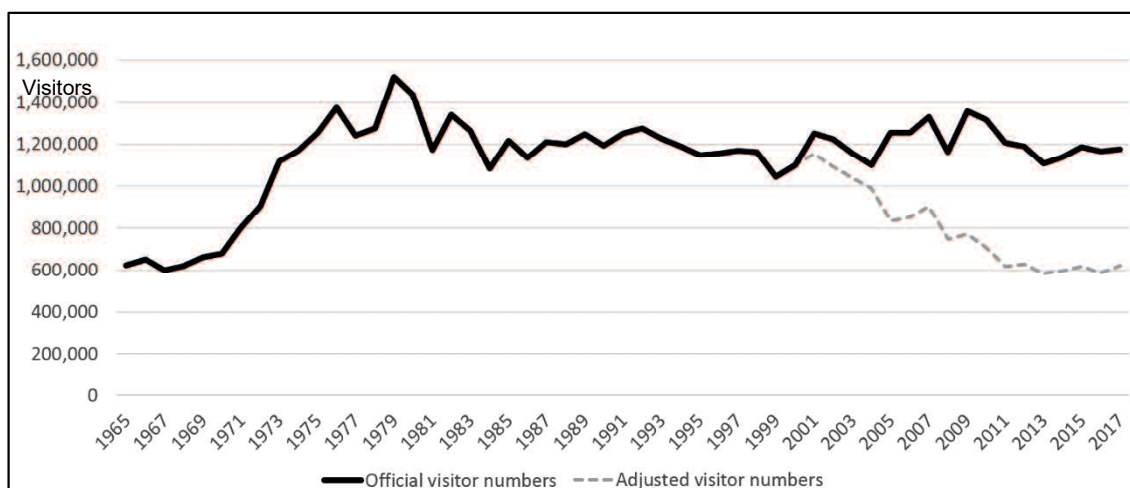


Figure 20: Adjusted visitor numbers. (compiled by author based on Tsuwano Town (2018b))

More detailed information is needed on the statistical calculation methods and the included attractions before 2001 to improve the reliability of the visitor data.

Guest nights

The visitor numbers can hide underlying problems in destinations, which prompts the analysis of other tourism statistics, the guest nights spent in the destinations. Data is available from 1984, and as seen in Figure 21., there is a definite decline period between the first data showing 115'637 guest nights in 1985 (and 117'335 in 1987), to 23'951 guest nights in 2005. That is a considerable 79.2% fall in 20 years (Tsuwano Town, 2018a).

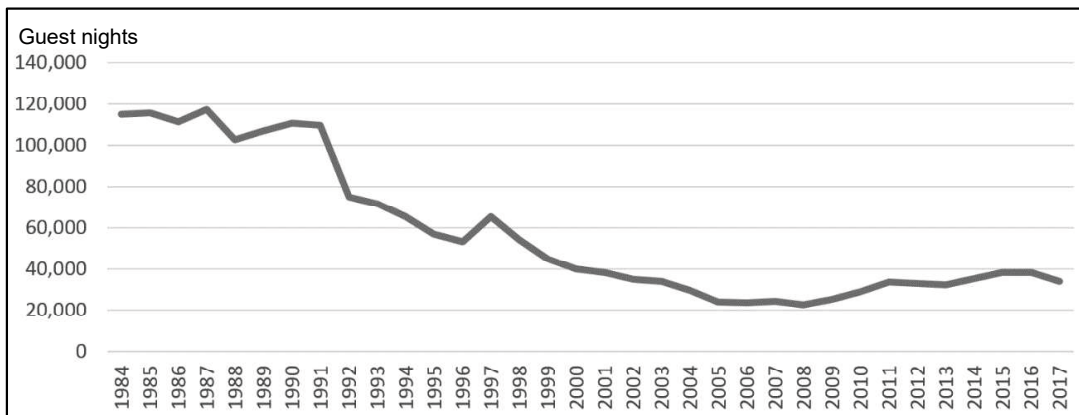


Figure 21: Guest nights. (compiled by author Tsuwano Town (2018c))

Focusing on the time period between 2000 and 2017, the decline lasts until 2005, and there seems to be a slight growth from 2008 to 2016, where the first significant drop starts. Foreign overnight tourist numbers are available from 2004, and as the graph (in Figure 22) shows, there is a slow rise from 511 to 1'080 in 2018, and a similar drop as in the overall numbers. The number of foreign guests is only a small portion of the overall guest nights, thus the right axis is used.

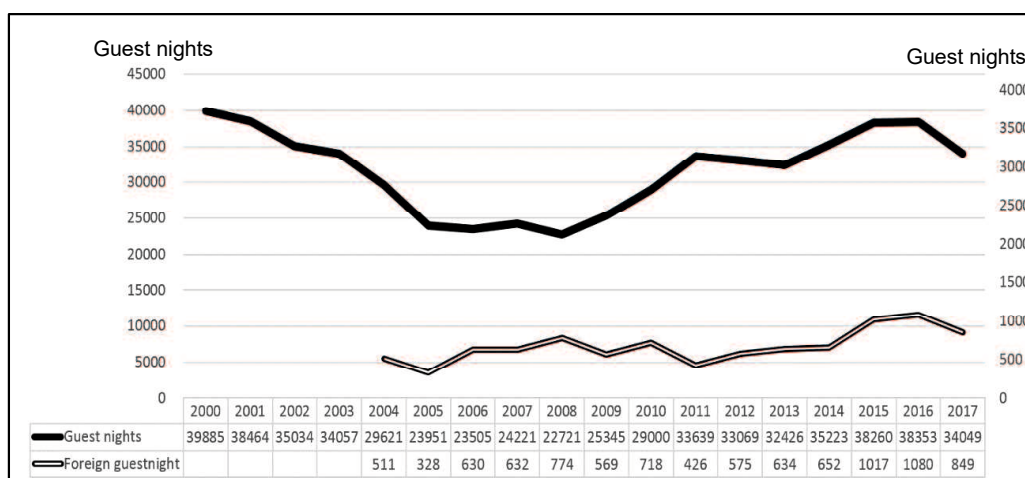


Figure 22: Overall guest nights on left and foreign guest nights on right axis. (compiled by author Tsuwano Town (2018c))

The official visitor numbers, previously described adjusted visitor numbers and the guest nights are show in Figure 23, with the left axis for the guest nights and right axis for the visitors. The adjustment shows a similar decline as the guest nights, but there are a few years apart, meaning that in Tsuwano as a destinations, first the change towards same-day trips destination started, followed by a decline in the overnight stays and the overall tourism industry.

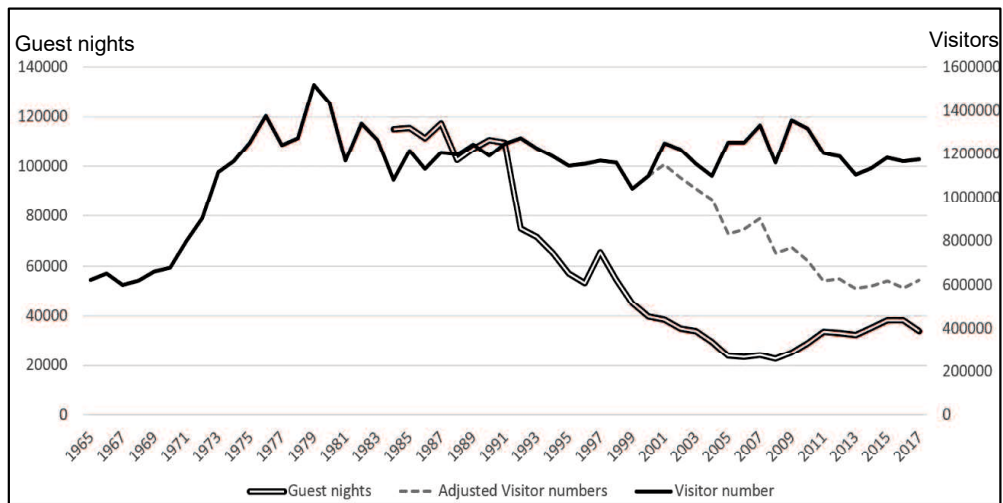


Figure 23: Guest nights and adjusted visitor numbers. Right axis for visitor numbers and left axis for guestnights (compiled by author based on Tsuwano Town (2018c,2018b), Shimane Prefecture (2008 - 2018))

Detailed information on the foreign staying guest's origin country is available from 2009, showing a high percentage of European tourists. While Japan and many other destinations in the region (Hagi, Shimonoseki) have large Asian tourist visitor interest, Tsuwano seems somewhat unknown for this segment.

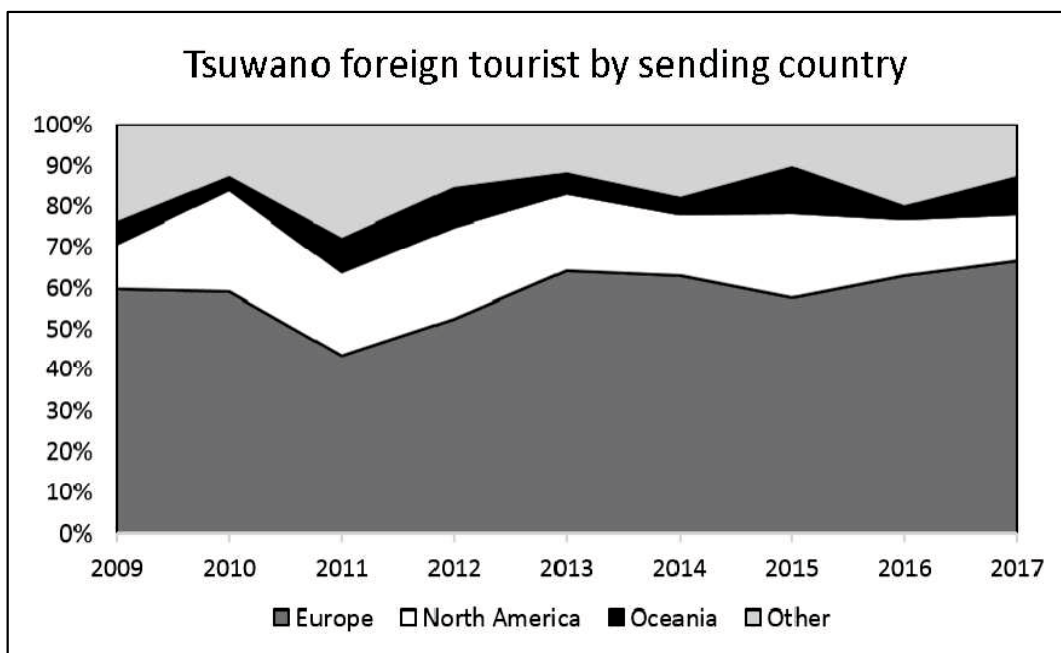


Figure 24: Foreign overnight tourist. (compiled by author based on Shimane Prefecture (2008 - 2018))

Japan has seen an influx of foreign tourists from Asian countries, especially from China in the past years. The sudden rise of inbound tourists is attributed to both the easing of visa application for Chinese citizens as well as the depreciation

of the Japanese Yen (Morikawa, 2017). Tsuwano the detailed data of the sending country of Tsuwano reveal that while the main tourism hotspots have a Asian-majority tourist mix, Tsuwano has European North American and Australian (Oceania) overnight visitors. These sending markets are mostly English speaking country either as their native language or as a secondary language, thus more than elsewhere, English tourist environment is needed.

6.3.2. Tourism boom induced by travel magazines and campaigns

The tourism statistics on visitors between 1965 and 2017 shown above (Figure 16), clearly show a sudden tourism boom from 1967. This is said to be partly the result of the “Discover Japan” campaign of Japan National Railways and “Sanin Little Kyoto” designation, both creating popularity for townscape tourism in travel magazines. In Tsuwano’s case one of the examples of this magazine based exogenous promotion is the articles of 1963 in Fudoki (Tsuwano, dreaming of the past, 1963). These campaigns were highly successful in portraying the destinations and attractions as authentic Japan and as “opposite of modern and Western” (Oedewald, 2008, p. 112).

A detailed analysis can be found on this “magazine induced tourism” by Kurosawa Soshiroda, & Tsutsumi(2013), reflecting on the same period starting with 1967. The paper defines four stages in Tsuwano’s townscape tourism. The first stage from 1966 to 1982 is the “Sudden growth”, followed by “Stagnation” between 1983 and 1992, “Decline” in 1993 and 2003 and “Confusion” from 2004 to the article’s release year of 2013. The article argues that compared to other towns with historic town centre (in the article, compared to Iwamura town in Ena District, Gifu Pref.), Tsuwano was not able to accommodate the sudden number of tourists after the first growth period. The town’s reaction of building other attractions such as art museums helped diversification, but the focus of the destination shifted and thus could not be labelled as “traditional townscape destination” any more. This shift of destination type leads to less exposure in travel magazines compared to other similar destinations (Kurosawa, Soshiroda, & Tsutsumi, 2013).

6.4. Tsuwano Town’s progress towards inbound

tourism

6.4.1. Securing and preserving cultural assets through designation

The previous pages introduced a Tsuwano that has been a culturally flourishing small castle town, with festivals and famous names connected to its name, which are known across Japan. The local government's progress towards securing and preserving the important tangible and intangible assets, the history and heritage of the town has results. The town has received many national and prefectural level designation, which can be viewed as acknowledgement and branding of possible tourism resources. The following table contains the important designations, from a tourism industry perspective. There are other designations which have important value as heritage but are more difficult to use in the tourism scene.

Nationally designated		
Important Historic building	Washibara Hachimangu Shrine	2011
Important Intangible Folk Cultural Property	Sagimai (heron) Dance	1994
Historic Landmark	Tsuwano Castle Ruins	1942
Historic Landmark	Mori Ougai residence	1969
Historic Landmark	Nishi Amane residence	1987
Historic Landmark	Kamei Clan cemetery	2018
Place of scenic beauty	Hori Garden	2005
Preservation district for groups of historic buildings	Tsuwano historic town center	2013
Japan Heritage	Tsuwano Then and Now: One Hundred Landscapes of Tsuwano	2015
Japan Heritage	Kagura theater	2019
Prefecture designated		
Important Intangible Folk Cultural Property	Tsuwano Odori (dance)	1962
Historic Landmark	Washibara Hachimangu Horse Archery Grounds	1966
Historic Landmark	Yorokan domain school	1969

Table 34: National and Prefectural designations. Source: Tsuwano Town (2018a), compiled by author

Important tourism resources that are not connected to any designations are shown in the following list.

Historical figures and famous artists:

- Mori Ougai, Nishi Amane, Anno Mitsumasa

Other important tourism resources:

- SL Yamaguchi: steam locomotive service from Shin-Yamaguchi
- Taikodani Inari Shrine: fifth most important Inari shrine in Japan
- Registered as "Little Kyoto" (non-government registration)

This is, in part, the result of the high consciousness by the local, that Tsuwano is currently first and foremost a destination. The 4th general development plan of Tsuwano Town, created in 1996, surveyed the residents to understand what they expect to be the future economy of Tsuwano. Even though, “livable environment” and “health” was high ranking in the values of the residents, when asked about what industry the town should invest more, contrary to what the town hall has anticipated, “tourism industry” was selected the most often, in different age groups and in groups from different parts of the town (Kokubo, 2014, p. 40). Recently developments in the designation series, is that the Heron Dance of Tsuwano is a candidate to become a UNESCO intangible cultural asset (Nagata, 2020).

6.4.2. Tsuwano Japan Heritage Center

The Japan Heritage mentioned designation and the promotion activity connected to it lead to the establishment of a heritage centre in the centre of the town, on the main road. This facility is free of charge for any visitor and serves multiple functions. First and foremost it is a museum that introduces Tsuwano’s history and heritage through the government designated 100 Edo-Meiji period paintings and maps. Through this visual explanation the visitors to Tsuwano can understand and immerse into the old traditional lifestyle of the past centuries, and see the places in the small town that preserved their beauty until today.

The second reason to create this centre is to function as a tourism-information providing free facility. Although the town has a tourism association and its office is in front of the station, the two facilities have a complementary relationship in terms of function. The tourism association helps the travellers with reservation, organises bus tours and manages the tour guide activity together with the volunteer guides. The heritage centre’s duties are to give the tourists a place where they can engage with the locals, through the always present concierge. Their task is to get into an interaction with the tourists and have a dynamical conversation about the town, rather than the static displays of the museum. The conversation turns where the guests wish to, thus creating a deeper connection between the visitor and the host community, even if the visitor is only in the

destination for a few hours.

Lastly, the Japan Heritage Center functions as a focal point of educating and engagement of the local community. It promotes preservation activities and helps the residents get involved with tourism-oriented projects of the town hall.

The Japan Heritage designation, as the Agency of Cultural Affairs designed it, is also towards the foreigners coming to Japan, and Tsuwano's town hall acted upon this requirement. The heritage centre has English speaking staff at all-time present, and though the only a fraction of the visitors is from abroad, the English guidance and general information of the destination is much appreciated by them. The centre is also the only museum in the town that has almost all parts of the exhibition in both Japanese and English.

This facility is a good example of Tsuwano Town's work towards achieving a destination more open for inbound tourist.

6.4.3. Conveying the message to foreigners

Tsuwano, as a heritage destination in rural Japan, has many things to offer to the visitor. Festivals that were preserved in Tsuwano for hundreds of years, special Obon dance where the tourist can be part of the festival, the only horse archery grounds remaining in Japan, and the 4th highest mountain-castle (remains), to mention a few. These events and places are part of the heritage, which with the help of the Japan Heritage 100 paintings of Edo-period, can be introduced and explained to the visitor, both Japanese and foreigner.

The difficulty lies in conveying this castle town's history, these familiar names and nostalgic moments from the literature classes of the high school (Mori Ougai) and karaoke nights (well-known song of Sada Masashi) to the foreigner tourist. Merely translating words and sentences and creating English pamphlets will not evoke the same nostalgic feelings as a domestic tourist would have. This is a challenge, for both the guides and the tourism development teams, and is often the centre of heated debates as Japanese have difficulty grasping the difference between cultural backgrounds.

Tsuwano is yet to fully embrace the thought of opening up to foreigners and aiming to tap into this market. During different informal interviews, the tourism

industry members did express their concerns about the future of the destinations, as they feel that the number of people coming to Tsuwano is less and less. While many complaints can be heard about the declining tourism numbers, the development of inbound strategy and action to put resources into this segment is an avoided topic.

6.5. Interview with destination development stakeholders

From June 6th to 8th (2020) three interviews have been carried out with town hall and tourism association. These interviews give a more detailed glimpse into the history and current situation of Tsuwano as a destination. The main questions were concentrating on:

- tourism's role in Tsuwano
- inbound tourism's role in Tsuwano
- critical points of inbound tourism that were or will be the focus of development
- the division of roles between the town hall, tourism association and private sector
- the attitude of tourism-related private sector stakeholders towards investment into inbound tourism

The interview also helps to understand what the next step in the development of the destination is, as the analysis of the tourism statistics show a steady decline. While the stagnation that the official numbers infer gives hope and time to adjust to the new market, the reality of decline gives an urgency to act and develop. Through the interview, the future plans of the destination is questioned, and how the development stakeholders' plan to push the community into a rejuvenation stage, either with or without outside capital.

6.5.1. Commerce and Tourism Division

Mr Kou FUJIYAMA, Head of the Commerce and Tourism Division of Tsuwano Town

The interview with Mr Fujiyama was held in the town hall, on the 8th of June (2020), with only Mr Fujiyama and the author present.

The most important points of the discussion were centred on the role division and inbound investment and development, with answer somewhat similar to that of the Tourism Association.

Mr Fujiyama explained that since the late 1980s, the importance of the tourism industry has been rising. In the past decade, the service and tourism industry employed the most people in Tsuwano Town. The town is already dependent on tourism, as there are no factories or large-scale operations in the area. Neighbouring settlements like Masuda City, where automotive industry related production helps keep the young in the community and contributes to maintaining a slow depopulation rate. Tsuwano has no such industry, and the ageing society is rapidly becoming a difficult main topic of the community.

While tourism is considered as the primary industry, the ageing population has an immense impact on the situation of the local stakeholders, as the capable workforce is hard to find and according to the town hall, there is also a shortage of *atotsugi* or successors to the businesses. This statement contradicts the survey carried out among accommodations of Tsuwano by the author, which shows that succession is “Not a problem”(50%) or “not a big problem”(50%). A possibility is that the difficulty of finding a successor is more prominent in non-accommodation businesses, although the next interview with the tourism association has a different result. While the town hall is supporting the successor search for businesses, the few successful cases were not directly connected to tourism. Three establishments closed in the past few years due to not having a management that would continue the work after the second retirement of the current owner. The size and complexity of an accommodation establishment and the declining tourism statistics make it harder to find an individual or company that would invest in a rural destination, and take over the management.

The attitude of the private sector towards investment in general and inbound tourism is negative, according to the town hall. A familiar expression came up during the interview, the private sector approach to tourism development is “we don’t have to do anything, the tourists will come anyway”. This attitude is not new in Tsuwano, as a newspaper article depicts the same attitude in 1965 during the tourism boom (Tsuwano Monogatari, 1965).

According to Mr Fujiyama, the most needed development in terms of inbound tourism is the way the information about the city is broadcasted. While there is much to see and experience in Tsuwano, it is not presented in an easy-to-understand and clean way to inbound tourists, both through media and in the destination. This statement seems to be in contradiction to what the tourism association does, or instead doesn't do: the inbound (English) version of the destination's homepage was created in 2010 and has not been updated ever since, with no contact information displayed to the Tourism Association what so ever.

According to the town hall, Tsuwano as a destination is changing its focus from the Inari shrine to the Tsuwano Castle Ruins, where a 700million Yen development is being carried out. The project of the restoration and development of the castle to be more accessible and to provide an expanded experience (with light-up during the night) started from the private sector, but not from Tsuwano. A wealthy individual who spent a childhood in Tsuwano (now residing in Fukuoka) donated 700million Yen to Tsuwano Town, with the condition that it can only be used to develop and protect the castle.

Summary:

- finding a successor for accommodations is difficult,
- tourism-related private sector stakeholders' attitude is indifferent to investment or development because "the tourist will come anyway."
- providing and broadcast of information needs to be developed
- the keyword for Tsuwano is "the castle", but the funds and initiative for development came from outside

6.5.2. Tsuwano Tourism Association

Mr Seiichiro KANEKO, Executive director of the Tsuwano Tourism Association

An interview was held in the tourism association's office, on the 6th of June (2020), with Mr Kaneko, Ms Satoko MATSUMURA (Tsuwano Tourism Association employee) and the author present.

The interview with representatives from Tsuwano Tourism Association had the

same topic question as to the one with the town hall, with the interviewees answering separately.

According to the tourism association, although tourism was and is still an essential part of Tsuwano's economy, until five years ago inbound was not considered as "not worthy of thinking about", both from the association's and from the private sector's point of view. Mr Kaneko goes on to explain that three years ago (2017) a few foreigners started to come to Tsuwano, mainly French and German tourists.

In reality, there was already a growing number of foreign staying guests from 1.2% of the total staying guests in 2012 to 2.5% in 2017 (Tsuwano Town, 2016) (Tsuwano Town, 2018b)

This rise of foreigners sparked a sudden call from accommodations that "something has to be done about it". This one-time exclamation from the private sector, was not well defined, lacking information on what the establishments are awaiting from the tourism association, what they need support with, or what their plans are for the inbound tourism. The association started "hastily" to think about inbound tourism and conducted a simple survey on the staying foreign guests and the route they have taking to Tsuwano. Foreigners visiting Tsuwano on a day-trip are almost non-existent according to the tourism association. The results of the inbound tourist's survey are not publicly available and are not mentioned in tourism strategy documents. The tourism association focused on *omotenashi* (hospitality) and recruited a local English guide.

Promotion of the destination towards inbound tourist "has not been carried out at all", according to Mr Kaneko, with only plans to cooperate with Hatsukaichi town and the bus terminal at Miyajima entrance. This lack of inbound promotion was the reason behind the aforementioned inquire from the accommodations, saying "if there is no inbound promotion, why are the foreigners coming?". According to Mr Yamaoka, this also may have created the false idea that "as with domestic tourists in the late 20th century, they (foreign tourists) will come without any promotion or development".

Concerning the question, whether accommodations have approached tourism association with the need for support in inbound aimed development such as

multilingual signage, a simple no was the answer. The establishments only approach the tourism association in urgent and emergency situations. The tourism association is only aware of difficulties concerning allergic and religious restrictions to food, which is further hindered by the language barrier.

The accommodations and tourism-related establishments have difficulties with no having successors to the business and thus are not interested in any investment, domestic or inbound. This comment from Mr Kaneko is in line with Mr Fujiyama from the Commerce and Tourism Division, although, in contradiction with the survey results mentioned above. In the survey carried out by the author, accommodations in Tsuwano answered a question on the succession with “Not a problem” in 50%, and “not a big problem” in 50% of the cases.

Summary:

- The Tsuwano Tourism Association is only aware of the slow rise of foreign tourists since “3 years ago” (meaning 2017). In reality, there was already a growing number of foreign staying guests from 1.2% of the total staying guests in 2012 to 2.5% in 2017 (Tsuwano Town, 2016) (Tsuwano Town, 2018b).
- There was a one-time question from the accommodations about rising inbound tourists, but apart from a survey and hiring a local English guide nothing developed from that notion.
- No promotion has been carried out aimed at foreign tourists.
- According to the tourism association, the accommodations do not approach them for support on inbound tourism development; they only communicate in emergency situations.
- Accommodations expressed difficulty only dealing with allergic and religious restrictions to food
- The tourism-related establishments are not interested in investment, partly because of the lack of successors to the businesses (this contradicts the accommodation survey conducted by the author)

6.5.3. Former Head of Commerce and Tourism Division

Mr Kouji YAMAOKA, Former Head of Commerce and Tourism Division of Tsuwano Town and currently vice president of Tsuwano Tourism Association

The last interviewee was Mr Yamaoka on the 6th of June, 2020. Mr Yamaoka

has experience with both the administrative side of tourism as a former Head of Commerce and Tourism Division on Tsuwano Town and the tourism association's side as the Vice President of the Tsuwano Tourism Association. Currently, he works in a researcher position in the local town history museum and is the president of the Tsuwano Odori Cultural Preservation Association.

Mr Yamaoka's answers to some of the main questions were quite similar to those of Mr Fujiyama and Mr Kaneko, with some differences in opinion regarding the importance of inbound tourism.

Inbound tourism through international relations was a central part of Mr Yamaoka's work at the town hall, with a flourishing partnership Tsuwano's sister-city of Mitte District in Berlin. The connection with the German community is through Ougai Mori, renowned writer born in Tsuwano and studied in Berlin. This cultural exchange was hoped to spark international tourism between Tsuwano and Germany. After a change in the leadership of Mitte District, the events slowly disappeared from the calendars, and the once flourishing exchange stopped altogether.

This connection with Mitte District and Germany was the start of inbound tourism, according to Mr Yamaoka, but was shortly after forgotten by the administration, tourism association and private sector. In hindsight, it was important for the stakeholders only as a "result in the report cards", rather than a step in a tourism strategy.

The interviewee criticized the attempt of the tourism association to promote at the Miyajima Bus terminal in Hatsukaichi, as "that is not part of any strategy, just a side-project in a Hatsukaichi-Tsuwano Memorial Year program. This shows a difference of opinion inside the organization, as it is not often that the Vice President is criticizing the planned steps of the same organization. This raises the question, if the Vice President's opinion is not in line with the organization, or not heard by other members, on what principle is the management operating?

The division of tasks between administration, (tourism) association and private sector, according to Mr Yamaoka, is clearly defined in theory but differs in reality. As a person who has been part of both the administration and the tourism association, his vision is that, the local administration is responsible for "hard"

development, such as facilities, infrastructure and designations regionally, nationally and internationally. Tourism associations in destinations have two significant roles; one is the “soft” development or human resource development, training guides and private sector members, and the other is serving as the *madoguchi* or first contact point between the administration and private sector. Finally, the private sector is the one who is providing services and goods, and creates a development strategy in the current environment, with input from the administration’s and tourism association’s plans. The reality is different, as in destinations of Tsuwano’s this size the roles are mixed up, and “the stakeholders don’t even understand their place in the system”.

Mr Yamaoka expressed hope for an inter-organizational meeting held between town hall, tourism association and Tsuwano Chamber of commerce every month. This meeting, aimed at tourism development in general, started when Mr Yamagoka was head of the Commerce and Tourism Division (2007), disappeared in the following years and was restarted three years ago.

- Inbound tourism should have been an essential part of the plans and strategy of the local administration and tourism associations, but it seems to be only used as administration results yielding side-projects
- An important connection with Berlin should have been the start of internationalization and inbound tourism development in Tsuwano, but interest dwindled
- There is a considerable difference in opinion inside the tourism association
- Role division is not clear in Tsuwano
- Inter-organizational meeting

6.5.4. Summary of the interviews

Through the interviews, a more detailed picture of the development of Tsuwano destinations was drawn, with information on the attitude of the public sector, the private sector’s connection to the tourism association and the town hall.

The interview showed that while there is a concept of an ideal division of tasks between the town hall, tourism association and the private sector, the reality is far from that. The tasks are overlapping, causing difficulties for the private sector to distinguish where to go in case of need of support. The conversation also strongly showed that the private sector’s attitude towards inbound tourism (and

tourism in general) is that of “the tourist will come anyway”, inferring that there is no need for development or investment into domestic or international markets, or into the foreign-friendly environment. This attitude has an impact on the tourism association, as their self-proclaimed goal is to answer the needs of the members, thus if the members are not interested in development, the tourism association won't start an inbound strategy by itself. The town hall is doing its best to strengthen the brand of the destinations, but the private sector and the tourism association is not interested in development.

This negative attitude is partly (but not mainly) due to the lack of successor in some establishment, according to the interviewees, but this can not be seen in the results of the direct survey to accommodations. There is either a miscommunication between partners (public sector and accommodations) or the answers to the survey were strongly influenced by the Japanese culture of *kikubari* and the notion of not complaining in public.

During the two interviews with the vice president and the executive director of the tourism association, a strong difference in opinion was recorded. The vice president Mr Yamaoka strongly dismissed the notion that a side-project in a memorial year program would constitute as part of an “inbound strategy”, and inferred that there isn't and never has been such strategy to begin with. This internal friction in the tourism association makes it more difficult for the destination to have a clear goal and motivate the stakeholders towards the goal. While the vice president urges the association to create a future-oriented strategy, the executive branch of the association, inline and reacting to the members' attitude, only seem to think in a status-quo or reactive strategy.

7. Conclusion

This paper aimed to better understand the current development status of Tsuwano heritage destination, and its progress towards inbound tourism.

The destination was analysed from several aspects, which are summarised through the following sections.

The literature review introduced several successful destinations, with inbound destinations development originating from inside the community, from local administration or from outside capital. These development steps included a change of mindset (Funck & Cooper, 2013), improvement of foreign tourist-friendly environment with multilingual service (Arima, et al., 2014) and often change in the townscape (Arima, 2017).

Tourist environment was found one of the key components of these successful inbound destinations (Yagasaki, 2017), and further data was introduced on what constitutes as a foreign-friendly environment (JTB, 2011).

The difference of endogenous and exogenous development and their impact on the inbound tourism destination development were discussed through examples (Yasumoto, 2015). These development types are also in an interactive connection with the tourism industry stakeholder attitude (Taniguchi, Imai, Hara, & Ishida, 2012). While exogenous development may cause intercultural friction (Nelson & Matthews, 2017) and can lead to a higher level of inbound preparedness, endogenous development can lead to more substantial involvement and higher quality of service from the local business owners (Funck, 2012)

Another difficulty of inbound tourism development (as well as general tourism development) is the severe lack of workforce in Japan and the tourism industry. Research literature of the phenomenon's impact was introduced (Perlaky, 2018), complemented with government data on employees in the accommodation sector (MLIT 2015, 2016, 2017, 2018, 2019). The role and of foreign as employees in the accommodations sector (Yoshida, 2019), and the development of services in the accommodation sector towards foreign tourists are introduced (Morikawa, 2017).

A survey was created based on these concepts (tourist environment, workforce shortage, stakeholder attitude) and conducted in Tsuwano and similar destinations in the area. The survey was supplemented with local administration and tourism association interview, to better understand the development principals and attitude of the destination.

7.1. Tsuwano's tourism development status

The destination passed its maturity curve after a rapid growth due to the "Discover Japan", and traditional townscape tourism boom from the late 1960s and is in a slow but steady decline. The statistical data on visitor numbers show a stagnation, but after an analysis of the data collection and calculation method, the adjusted data shows a decline, which is supported by the accommodation statistic. This means that the destination is not changing into a day-trip destination, but is actually in the decline stage of the life cycle, and did not yet manage to innovate to achieve a rejuvenation stage.

Inbound tourism is an opportunity to revive a rural destination, and in part as a result of the local government's activity, cultural assets are being secured and designated on the prefecture and national level. These designations are essential both financially, as the central and prefectural government does provide a specific budget for preservation, but it is also crucial for recognition. A UNESCO World Heritage designation can increase the numbers of visitors flowing into a destination because it is a brand well-known all over the world. Japan Heritage is aiming in the long term to be a recognised brand, but the system has not been promoted as such successful. The designation also means a higher awareness and education of the locals, thus it has several functions.

7.2. Survey results

Although the local government is active in the preserving and branding of cultural assets, the local tourism industry does not seem to have followed their lead. A survey of the local restaurants showed a surprisingly high ratio of establishments with an English menu, but it is a project of a nearby university, rather than the owners' innovation to attract more foreigners. Through the short

interviews during the survey, one of the realities of a rural destination was apparent, even though not included into the survey, and that is the average age of the owners, managers and staff. The willingness to innovate, to develop multilingual menus, Wi-Fi and electronic payment services are low.

The accommodation sector survey in the destinations showed the severe problem of workforce shortage. While other topics were also selected as difficulties both in general and for inbound tourism, the problem of hiring was selected as the most severe. The population of rural destinations' are declining at a faster pace than that of larger cities, thus the available working-age labour is diminishing at a quick pace. Tsuwano is no exception from this change, on the contrary, as a rural small town, ageing and migration towards cities have had a more severe impact than can be seen in prefecture-level surveys. The changing visa system might have a positive impact on this, as it will be easier to attract foreign workers into rural areas, not just the larger cities with exchange students in education facilities (Yoshida, 2019).

7.3. Attitude and *kikubari*

Attitude towards inbound tourism was positive according to the result of the accommodation survey, although a difference has to be noted between the two surveys. In the case of the restaurants, the survey was closer to observation and conversation with the owners and managers, more of the "voice" of these people were included in the conclusion that they are not keen on investing into the future, into developing services that the foreign tourists are requiring. The accommodation survey has less interaction with the managers and owners, and it is based more on the data provided by the survey sheets. In this result, the attitude towards inbound tourism was positive, but further study and perhaps an interview-based survey is needed to find out, whether this positive attitude was just a cultural reaction to questions on a paper, or there is a gap difference in willingness to develop for the inbound market, between restaurants and accommodations. As Nelson and Matthews described the importance of the "kikubari" cultural concept, in some cases Japanese tend to be positive and welcoming (Nelson & Matthews, 2017), but that does not necessarily mean a will

to invest.

The attitude towards foreign tourists coming to Japan may differ by the type of establishment, but the shortage of workforce has an impact on both restaurants and accommodations. The future tourism destinations development strategies at the local and central level have to address this issue directly, as a labour-intensive industry such as tourism cannot progress without human resources.

7.4. Interviews

Through the interviews, a more detailed picture of the development of Tsuwano destinations was drawn, with information on the attitude of the public sector, the private sector's connection to the tourism association and the town hall.

The interview showed that while there is a concept of an ideal division of tasks between the town hall, tourism association and the private sector, the reality is far from that. The tasks are overlapping, causing difficulties for the private sector to distinguish where to go in case of need of support. The conversation also strongly showed that the private sector's attitude towards inbound tourism (and tourism in general) is that of "the tourist will come anyway", inferring that there is no need for development or investment into domestic or international markets, or into the foreign-friendly environment. This attitude has an impact on the tourism associations, as their self-proclaimed goal is to answer the needs of the members, thus if the members are not interested in development, the tourism association won't start an inbound strategy by itself. The town hall is doing its best to strengthen the brand of the destinations, but the private sector and the tourism association is not interested in development.

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During the two interviews with the vice president and the executive director of the tourism association, a strong difference in opinion was recorded. The vice

president Mr Yamaoka strongly dismissed the notion that a side-project in a memorial year program would constitute as part of an “inbound strategy”, and inferred that there is and has never been such strategy to begin with. This internal friction in the tourism association makes it more difficult for the destination to have a clear goal and motivate the stakeholders towards the goal. While the vice president urges the association to create a future-oriented strategy, the executive branch of the association, inline and reacting to the members’ attitude, only seem to think in a status-quo or reactive strategy.

7.5. Development

Development of a destination, most of the time, is not controlled by one entity, but is a sum of the progress of all the stakeholders, public, private and non-profit. There are many examples of this, where the private sector or non-profit sector started the innovation (Funck, 2012), and the local or in Takayama's case, the central government "followed". Similar case can be found in Kyoto, where the accommodations themselves started inbound oriented projects (Morishita, 2019). These are important endogenous regional developments, something that originates from inside of the destinations. Yasumoto also showed that development with capital and management from outside of the community could, especially in the case of foreign investment, lead to intercultural differences between stakeholders (Yasumoto, 2015).

Nonetheless, Niseko is a good example that while some differences are originating from new businesses from outside, and in this case from another culture, in some cases they are just considered as new competitors, and not as a negative intrusion (Nelson & Matthews, 2017). Tsuwano, maybe because of the difference in tourism resources or the distance from major tourism hubs, is yet to experience incoming capital and management from either metropolitan Japan or from abroad. While this allows endogenous development, the driving force seems to be missing.

In Tsuwano's case, the local government has been successful at securing cultural assets, to the extent that the Heron Dance of Tsuwano is a candidate for UNESCO intangible cultural asset. This success and continuous work towards

strengthening the image of the destination is something that the private sector might not be able to achieve, and there seems to be a lack of willingness and a shortage of people in the tourism sector. The stakeholders, the members of the rural destination's tourism industry have to realise that without innovation, the decline will continue. While the local authority has been successful on its own right, for the future of the destination, a broader development of human resources is needed. This means both attracting new workforce, younger people from the main cities and foreign workers, but also motivating locals to start innovating.

This research concludes that while the needed tourism resources, tourism infrastructure of an established destination and the local government's strong will and results of branding the town as a Heritage destination is present, the local tourism industry's attitude towards inbound tourism hinders any improvement towards becoming an inbound tourism destination. Furthermore, the strong connection between the tourism industry member's negative attitude and tourism association's attitude creates an environment, where there is no development strategy created for the destination (by the tourism association), not to mention inbound strategy.

The identified concepts that influence the inbound development of a destination have been taken under the magnifying glass. It was found that while there is some level of foreign-friendly tourist environment (high number of English menus), it is an exogenous development started by a university. Workforce shortage as the second factor was proved through a survey to be a severe problem in Tsuwano, more so than in other reference destinations. Finally, although the stakeholder attitude measured through the survey showed promise, the interviews and observation in the destinations implied a different reality. The attitude of tourism industry members, and directly influencing tourism association's executive level, is that of "we don't have to do anything, the tourists will come anyway".

Previous research results in the literature review show that in some cases, the start of an exogenous development, capital from outside of the destination can kick-start a fast-paced development, but it is also shown that this kind of development more often happens in sports-related destinations (Nelson &

Matthews, 2017), and it comes with intercultural friction that the community might try to avoid altogether.

The tourism academia often concentrates on successful destinations and the strategy that helps the development of these communities. This type of analyzing the successful is important, but shows only half of the picture. This research aimed to understand why an established destination like Tsuwano, with all the needed cultural, natural and other tourism resources, and an actively brand-developing local administration can still end up in a steady decline, without the prospects of rejuvenation. This research hopes to stand as an analysis of the difficulties that destinations can face from within, rather than from their market and industry environment.

7.6. Further research

Further research is needed to understand the mentality of the stakeholders of the local tourism scene. While the local government seems to be strategically securing and branding the assets, the private sector does not seem to innovate or develop. The limitation of the accommodation survey is that it cannot evaluate the mentality and interest or disinterest of the owners and managers. This type of paper-based survey also has a certain number of questions that the respondents are willing to fill out. Thus a detailed, in-depth data gathering is not possible. This paper aimed to get an understanding of inbound tourism destinations, and the reality of Tsuwano, a dataset, that is aimed to be the bases of further research.

The next step is to have interviews with the private sector stakeholders, to understand the discrepancy of being open towards inbound tourism according to the attitude survey, but not investing or innovating to attract and cater to foreign visitors.

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9. Appendix

飲食店の訪日外国人観光客の受入環境整備・アンケート

アンケートの内容につきましては、集計した後に、論文執筆や発表など研究内容を公表する場においてのみ使用いたします。各飲食店の店名及び回答内容につきましては公表いたしません。

Q1 店名のローマ字表記 a 漢字・ひらがな・かたかな b ローマ字 c 両方	<input type="checkbox"/>
Q2 英語のサービス a 英語ができるスタッフはいない b 英語ができるスタッフはいるが、いつもいるわけではない c 英語ができるスタッフはいつもいる	<input type="checkbox"/>
Q4 英語のメニュー a 英語のメニューがない b 各料理に、宗教やアレルギーに関連する食材のピクトグラ c メニューの一部は英語で書いてある d 英語のメニューがある	<input type="checkbox"/>
Q5 メニューの視覚化 a 文字でのみ表示 b 文字と写真による表示 c 食品サンプルが展示されている	<input type="checkbox"/>
Q6 トイレ a 和式 b 洋式 c 和式も洋式もある d トイレない	<input type="checkbox"/>
Q8 クレジットカードが利用できる a 利用可能 b ある金額を超えたら利用可能 c 利用不可能	<input type="checkbox"/>
Q9 無線インターネット(Wi-Fi)の有無 a ある b ない	<input type="checkbox"/>

訪日外国人と宿泊施設の現状

山口大学東アジア研究科博士課程のペラキと申します。お手数をかけしますが宿泊施設のインバウンド対策と困難についてのアンケート調査にご協力をお願いしたいと思います。観光産業の問題を把握するため、産業の皆様の貴重なご意見が必要と思ひまして、アンケート調査を実施したいと思ひます。何卒、宜しくお願ひ申し上げます。

一般情報

宿泊施設の種類 シティホテル ビジネスホテル リゾートホテル 簡単宿所
 旅館 温泉旅館 民宿 民宿 その他： _____

創立の年： _____ 収容人数： _____ 棟 _____ 室の和室で合計 _____ 名 _____ 室の洋室で合計 _____ 名

従業員数： 0-9人 10-29人 30-99人 100人以上 のうち、パート・アルバイトの割合 _____ %

訪日外国人客のだいたい割合 0-19% 20-39% 40-59% 60-79% 80-100%

値段（素泊まり、一人一泊） 0-5000 5000-10000 10000-20000 20000-

営業上での困難（チェックを入れてください）

1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	問題と感じてない
2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	解決できる問題と感じている
3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	やや問題と感じている
4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	大きな問題と感じている
5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	観光客が減る
6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	観光客構成、ニーズの変化
7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	季節による宿泊客数の変動・増減
8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	市場の複雑さの変化（ネット予約、民泊など）
9	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	正社員に雇う人材の不足
10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	パートやアルバイト人材の不足
11	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	調理師など熟練者人材の不足
12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	人材の高齢化
13	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	後継ぎがない
14	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	施設（建物）の整備、維持、近代化の困難
15	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	客室での備品の整備、維持、近代化の困難
16	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	訪日外国観光客（テレビ、エアコン、ポット等）
17	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	その他： _____

上の1から13の中で政府や自治体、または観光協会の支援が必要と思われることがあれば、最大3つ選んでください。番号： _____、 _____、 _____

宿名の看板 <input type="checkbox"/> 日本語 <input type="checkbox"/> ローマ字 <input type="checkbox"/> 両方
英語できるスタッフ <input type="checkbox"/> いつもいる <input type="checkbox"/> いない <input type="checkbox"/> いるが、いつもではない
クレジットカードが利用できる <input type="checkbox"/> 利用可能 <input type="checkbox"/> 利用不可能
無線インターネット <input type="checkbox"/> ロビーのみある <input type="checkbox"/> ない <input type="checkbox"/> ロビーと各室にある（電波がある）
トイレの整備 <input type="checkbox"/> 和式 <input type="checkbox"/> 洋式 <input type="checkbox"/> 両方

訪日外国観光客：下のトピックについて問題があった、又は問題がおこるといふ不安がありますか。

1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	問題と感じてない
2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	解決できる問題と感じている
3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	やや問題と感じている
4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	大きな問題と感じている
5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	外国人とのコミュニケーションの不安
6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	外国語ができる人材の不足
7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	外国語ができる人材人件費が高い
8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	外国人への宣伝・PRが難しい
9	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	予約やチェックイン・アウトに関するトラブル
10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	支払いに関するトラブル
11	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	外国人宿泊客の身分証明に関する
12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	施設合図（案内）の多言語化の困難
13	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	どのようにおもてなしをしたらよいかの不安
14	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	宗教やアレルギーへの対応（食べ物等）
15	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	他のお客さんへの迷惑行為
16	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	温泉やお風呂マナー、食事マナー
17	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	その他： _____
18	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	その他： _____

上の1から14の中で政府や自治体、または観光協会の支援が必要と思われることがあれば、最大3つ選んでください。番号： _____、 _____、 _____

訪日外国人観光役についてのご意見
日本の経済として重要な輸出・収入になるので、力を入れるべき そう思う <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> そう思わない
国内観光客減少対策として力を入れるべき そう思う <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> そう思わない
外国人が日本の文化に興味を持っているので、観光は重要な国際交流だ そう思う <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> そう思わない
外国人と交流できることでよい経験になる そう思う <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> そう思わない
東京2020オリンピック競技大会はあなたのビジネスに影響がある 影響ない <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> 大きく影響する
自治体は観光地開発の予算を下の2つの観光客層に対し、それぞれどのような割合で支出すべき？ 国内観光 <input type="checkbox"/> % インバウンド <input type="checkbox"/> %

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 記入したアンケートを次のファクス(083) 963 9070又denes@perlaky.huに送ってください。
 研究のご協力を誠に有難う御座いました。ますますのご活躍を祈っております。