

## Section 3

# A TOURISM STRATEGY FOR THE POST-EXPO ERA: AN ANALYSIS OF BRAND POWER AND REGIONALIZATION

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As previously stated in Section 2, the tourism strategy for the Kansai region, with the objective of enhancing the region's appeal post-Expo, should focus on the creation of programs that facilitate wide-area and circuit tours. As this will enable the region to further appeal to tourists, it is essential to discover and refine the brands of tourist destinations.

From December 2023 to January 2024, APIR conducted a web-based survey with the objective of establishing a “brand power” index for tourist destinations in the Kansai region. The objective of this survey was to evaluate the brand power of tourist destinations using three quantitative benchmark indicators: satisfaction, intention to revisit, and intention to recommend. By employing these indicators, our intention was to provide not only a tour plan connecting tourist attractions, but also a new tour plan for a vast area of the Kansai region based on the tourists' travel objectives and according to their attributes.

Subsection 3.1 provides an overview of the questionnaire survey conducted in this study, and Subsection 3.2 elucidates the purpose of visits to each tourist destination by Japanese and foreign residents. In Subsection 3.3, we undertake a comparative analysis of tourists' expectations and satisfaction levels following their visits to tourist attractions in each prefecture. In Subsection 3.4, three indices were calculated: overall satisfaction with the tourist destination, intention to recommend it to others, and intention to revisit it. These indices were then compared in order to clarify the evaluation of the tourist destination by tourists. In Subsection 3.5, a plan for a wide-area sightseeing tour of the Kansai region was examined from the viewpoint of travelers' attributes (purpose of the tour).

## 1. An Outline of the Questionnaire

This survey<sup>1)</sup> was conducted via a web-based questionnaire targeting Japanese

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1) Information from the Japan Tourism Agency (2010) was used as a reference in preparing the questionnaire. For a detailed description of the questionnaire and its questions, please refer to Asia Pacific Institute of Research (2024).

and foreign residents of Japan<sup>2)</sup> who live in Kansai and outside of Kansai. The objective of this study was to gain insight into the evolving travel patterns in the wake of the Corona pandemic and to develop a comprehensive tourism plan for the Kansai region, tailored to the specific needs and preferences of tourists<sup>3)</sup>. To this end, we focused our inquiry on individuals who had visited two or more designated tourist destinations<sup>4)</sup> with overnight stays in 2022 or later, with at least one of these visits occurring in Hyogo, Nara, Shiga, or Wakayama Prefecture. Our sample included 500 Japanese and 200 foreign residents.<sup>5)</sup>

The Japan Tourism Agency (2010) concludes that customer satisfaction, intention to revisit, and intention to recommend a tourist destination are inextricably linked to the quality of service at that destination<sup>6)</sup>.

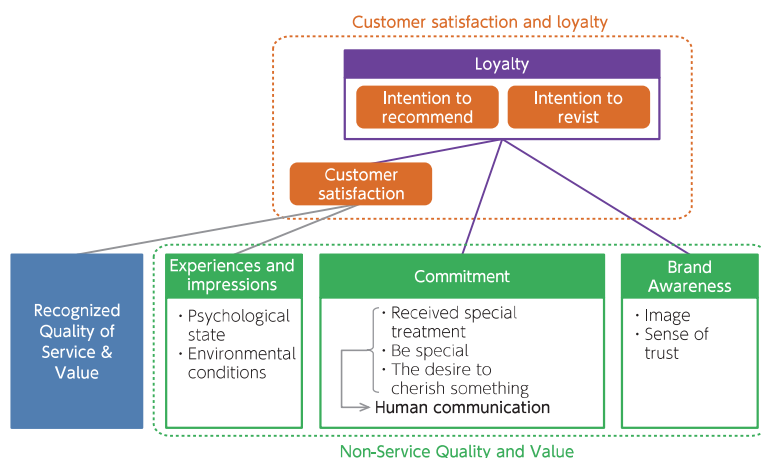


Figure 3-3-1

Survey system for questionnaires

Source: Compiled by APIR based on MLIT (2010).

- 2) Foreign residents in Japan were defined as those whose nationality was Asia, Europe (within the EU), North America, or Oceania, and whose period of stay in Japan was two years or longer.
- 3) The definition of Kansai here is based on Shiga, Kyoto, Osaka, Hyogo, Nara, and Wakayama Prefectures.
- 4) See Reference Table 3-3-1 for details on each tourist area.
- 5) See Asia Pacific Institute of Research (2024) for sample sizes for each tourist destination area.
- 6) According to the Japan Tourism Agency (2010), “In the case of sightseeing trips in particular, since they are time-consuming and costly, and since the desire for the unknown, such as ‘to see something once’ or ‘to experience something once,’ is often at the core of demand, it is important to pay attention not only to the intention to come back but also to the intention to refer visitors. This is why it is important to pay attention not only to the intention to return but also to the intention to refer.

In conclusion, when examining customer satisfaction and loyalty, it is essential to evaluate other related factors, including experience, impressions, sense of connection, brand awareness, non-service quality, and value, while maintaining “perceived service quality and value” as the central focus. In this questionnaire survey, we took these factors into account and created a survey questionnaire based on APIR’s distinctive perspective.

## 2. The Purpose of Travel in Tourist Destinations: Japanese and Foreign Residents

Section 3.2 examines the differences between Japanese (Kansai and non-Kansai residents) and foreign residents (Asian, European, American, and Australian) in terms of the purpose of travel to each tourist destination.

### 【Question items】

Table 3-3-1 shows the purpose of the trip, which consists of 13 items and allows multiple responses.<sup>7)</sup>

Table 3-3-1 Question items

(1)	Seeing cultural landmarks and historic sites
(2)	Seeing natural scenery
(3)	Visiting tourist and cultural facilities
(4)	Visiting a sports facility
(5)	Visiting a town or city
(6)	Experiencing the richness of nature
(7)	Experiencing local culture
(8)	Taking a hot spring bath
(9)	Eating delicious food
(10)	Shopping
(11)	Local festivals and events
(12)	Visiting relatives and acquaintances
(13)	Other

Source: Compiled by APIR.

7) See Asia Pacific Institute of Research (2024) for detailed figures on the rate of the purpose of travel in each tourist destination area. When indicating the names of the question items in Figs. 3-3-2 to 3-3-5, we used abbreviations such as “historic sites” for “seeing cultural sites,” “natural scenery” for “seeing natural scenery,” and “eating delicious food” for “eating.”

## [Japanese: residents of Kansai]

The initial step is to examine the travel purposes of Kansai residents and their characteristics (Figure 3-3-2).

In the Osaka-Kita and Osaka-Minami areas, the most frequently cited reason for travel was the desire to “eat delicious food,” reflecting the concentration of dining and entertainment facilities such as the Tenjinbashisuji Shopping Arcade and Dotonbori. These two responses collectively accounted for 21.4% and 19.7%,

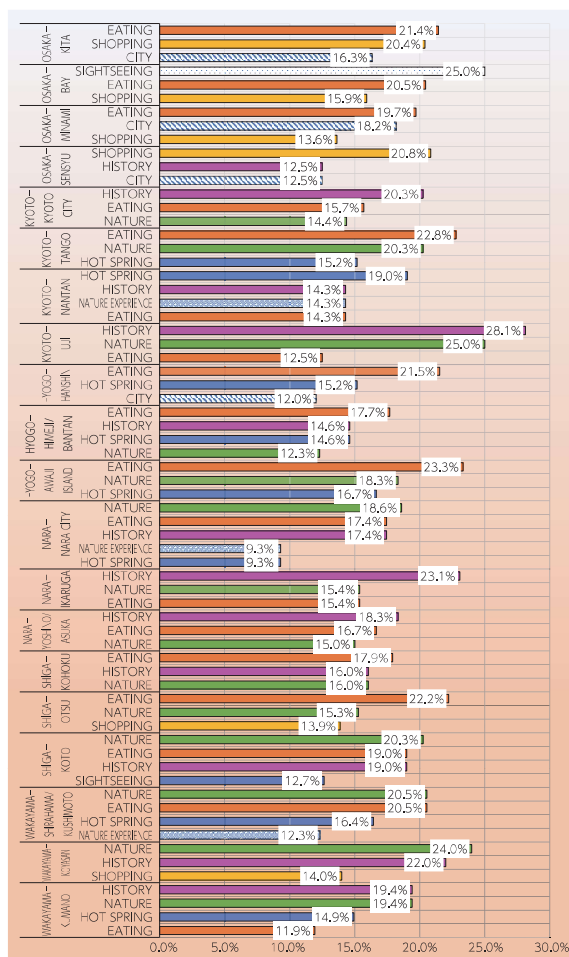


Figure 3-3-2

Comparison of travel purposes of Kansai residents by area

Source: Compiled by APIR based on the survey results.



respectively, of the total number of respondents. In the Osaka-Bay area, the most frequently selected response was “To visit tourist and cultural facilities (aquariums, museums, etc.)” (25.0%), reflecting the proximity of attractions such as Kaiyukan and Universal Studios Japan. The most frequently selected response in the Osaka-Senshu area was “shopping,” at 20.8%.

In the Kyoto-city and Kyoto-Uji areas, a significant proportion of respondents (28.1%) selected “visiting cultural sites and historic places” as their primary motivation. This can be attributed to the concentration of numerous historical sites, including Kiyomizu Temple and Byodoin Phoenix Hall. Subsequently, the most frequent responses in the “Kyoto-Tango” and “Kyoto-Nantan” areas were, respectively, “eating delicious food” (22.8%) and “enjoying hot springs” (19.0%).

In Hyogo Prefecture, the most frequent response was “eating delicious food,” which was selected in all areas. The most frequently selected responses in the Hyogo-Hanshin area were “Eating delicious food” (21.5%), “Visiting cultural sites and historic places” (17.7%), and “Enjoying hot springs” (17.7%). In the Hyogo-Himeji/Bantan area, the most frequently selected responses were “Eating delicious food” (17.7%), “Visiting cultural sites and historic places” (17.7%), and “Enjoying hot springs” (17.7%). In the Hyogo-Awaji Island area, the most frequently selected response was “Eating delicious food” (23%).

In Nara Prefecture, the most frequently selected response was “seeing natural scenery” (18.6%) in the “Nara-Nara City” area, while “seeing cultural sites and historic places” (23.1% and 18.3%) was the most frequent response in the “Nara-Ikaruga” and “Nara-Yoshino/Asuka” areas, respectively.

In Shiga Prefecture, the most frequently cited reason for visiting was “eating delicious food,” with 17.9% of respondents in Shiga-Kohoku and 22.2% in Shiga-Otsu selecting this option. In contrast, “enjoying natural scenery” was the most frequently cited reason for visiting Shiga-Koto, with 20.3% of respondents selecting this option.

In the Wakayama-Shirahama/Kushimoto region, the most frequently cited reasons for visiting were “seeing natural scenery” and “eating delicious food,” at a respective rate of 20.5%. In the case of Wakayama-Koyasan, the most popular activity was “seeing natural scenery,” with a frequency of 24.0%. In Wakayama-Kumano, the most popular activities were “seeing cultural sites” and “seeing natural scenery,” with respective frequencies of 19.4%.

These findings suggest that residents of Kansai tend to visit tourist attractions in Kansai primarily to experience the food and historical cultures.

### [Japanese: residents outside of Kansai]

Next, let's look at the purpose of travel for non-Kansai residents by area (Figure 3-3-3).

The most frequently selected response in the Osaka-Kita, Osaka-Bay, and Osaka-Minami regions was “eating delicious food,” with respective frequencies

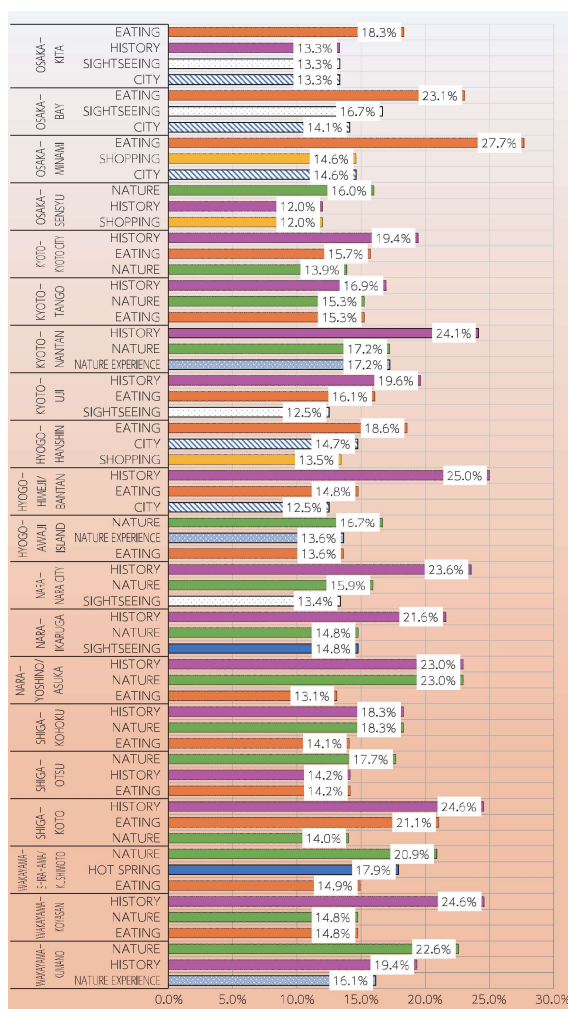


Figure 3-3-3

Comparison of travel purposes by area for people living outside Kansai

Source: Compiled by APIR based on the survey results.

of 18.3%, 23.1%, and 27.7%. The most frequently selected response in the Osaka-Senshu district was “seeing natural scenery,” at a rate of 16.0%.

The highest percentages for “seeing cultural sites and historic places” were observed in “Kyoto-Kyoto City” (19.4%), “Kyoto-Tango” (16.9%), “Kyoto-Nantan” (24.1%), and “Kyoto-Uji” (19.6%).

In the Hyogo-Hanshin area, the most frequently selected activity was “eating delicious food” (18.6%), while in the Hyogo-Himeji/Hantan area, it was “seeing cultural sites and historic places” (25.0%). In the Hyogo-Awaji Island area, the most frequently selected activity was “viewing natural scenery” (16.7%).

In the Nara-Nara City (23.6%), Nara-Ikaruga (21.6%), and Nara-Yoshino/Asuka (23.0%) areas, the most common response was “seeing cultural sites and historic places,” while “seeing natural scenery” (23.0%) was also a prevalent choice in the Nara-Yoshino/Asuka region.

In the Shiga-Kohoku area, the most frequently selected activities were “seeing cultural sites and historic places” (18.3%) and “seeing natural scenery” (18.3%). In the Shiga-Otsu and Shiga-Koto areas, the most frequent responses were “seeing natural scenery” (17.7%) and “seeing historic cultural sites” (24.6%), respectively.

The most frequent responses for both the Wakayama-Shirahama/Kushimoto area (20.9%) and the Wakayama-Kumano area (22.6%) were “natural scenery” and “cultural sites of historical interest,” respectively.

As previously stated, it is believed that visitors residing outside of Kansai visit the region primarily to enjoy its historical, cultural, and natural scenery. In Osaka Prefecture, a significant number of respondents indicated that their primary motivation for visiting the area was to experience the local cuisine, with the exception of the Osaka-Senshu region.

### **【Foreign residents: Asia】**

This study will examine the characteristics of the travel purposes of foreign residents in Asia, Europe, the United States, and Australia.<sup>8)</sup>

The purpose of travel to each area among foreign residents in Asia is first considered (Figure 3-3-4).

In the Osaka-Kita area, the most frequently selected activities were “seeing cultural and historic sites” (17.8%) and “visiting tourist and cultural facilities” (17.3%), respectively. In the “Osaka-Minami” area, “eating delicious food” (22.0%) was the most frequently selected activity, a result that was consistent for

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8) Because the sample size of foreign residents was smaller than that of Japanese respondents, areas with 10 or more respondents were selected for this survey.

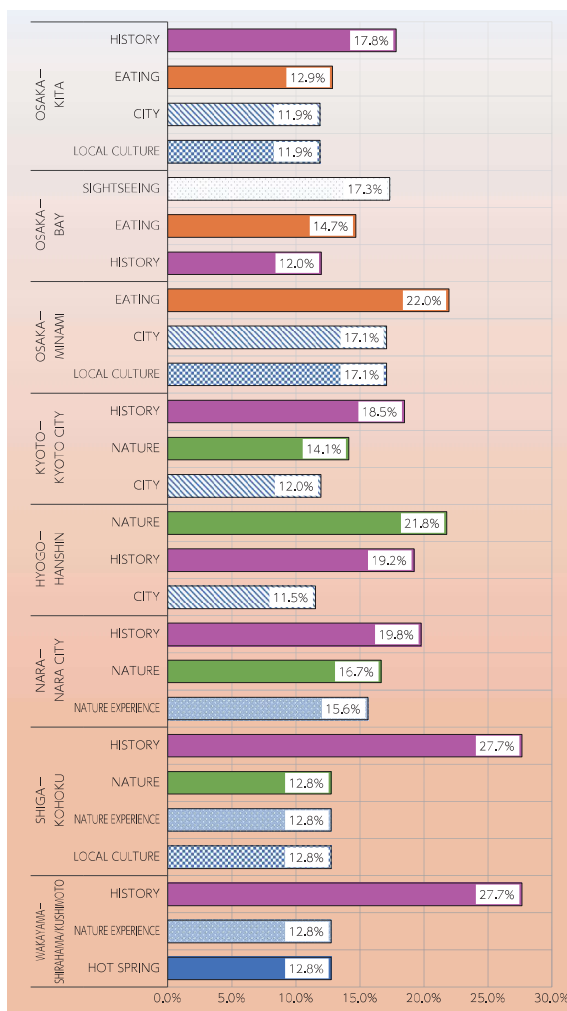


Figure 3-3-4

Comparison of travel purposes of foreign residents (Asia region) by area

Source: Compiled by APIR based on the survey results.

both Japanese and non-Japanese respondents.

In the “Kyoto-Kyoto City” category, the most popular choice was “seeing cultural sites” (18.5%), followed by “seeing natural scenery” (14.1%) and “visiting towns and cities” (12.0%).

In the Hyogo-Hanshin area, the most popular choice was to “see natural

scenery” (21.8%), followed by “see cultural sites” (19.2%) and “visiting towns and cities” (11.5%).

In the Nara-Nara City category, the most popular choice was “seeing cultural sites” (19.8%), followed by “seeing natural scenery” (16.7%) and “experiencing the richness of nature” (15.6%).

In the Shiga-Kohoku area, the most popular choice was “seeing cultural sites” (27.7%), followed by “seeing natural scenery” (12.8%), “experiencing the richness of nature” (12.8%), and “experiencing local culture” (12.8%).

In the Wakayama-Shirahama/Kushimoto area, the most popular choice was “seeing cultural sites and historic places” (27.7%), followed by “experiencing the richness of nature” (12.8%) and “visiting hot springs” (12.8%).

### **【Foreign residents: Europe, U.S. and Australia】**

Figure 3-3-5 illustrates the purpose of travel to each area for foreign residents from Europe, the United States, and Australia.

In the Osaka-Kita area, the most popular activity was visiting cultural and historic sites (25.0%), followed by visiting tourist and cultural facilities (15.5%) and eating delicious food (11.9%).

In the “Kyoto-Kyoto City” category, the most popular choice was “seeing cultural sites” (18.8%), followed by “eating delicious food” (15.3%) and “seeing natural scenery” (14.6%).

In the Hyogo-Hanshin area, the most popular choice was “seeing cultural sites” (26.2%), followed by “seeing natural scenery” (21.3%) and “visiting tourist/cultural facilities” (14.8%).

In the “Nara-Nara City” category, the most popular choice was “seeing cultural sites and historic places” (19.8%), followed by “seeing natural scenery” (17.0%) and “experiencing local culture” (16.0%). Subsequently, 17.0% of respondents indicated a preference for “seeing natural scenery,” while 16.0% selected “experiencing local culture.”

In the Shiga-Kohoku area, the most popular choice was “seeing cultural sites and historic places” (19.4%), followed by “seeing natural scenery” (19.4%) and “experiencing the richness of nature” (12.9%).

In the Wakayama-Shirahama/Kushimoto area, the most popular choice was “seeing cultural sites and historic places” (18.3%), followed by “seeing natural scenery” (18.3%) and “visiting hot springs” (15.0%).

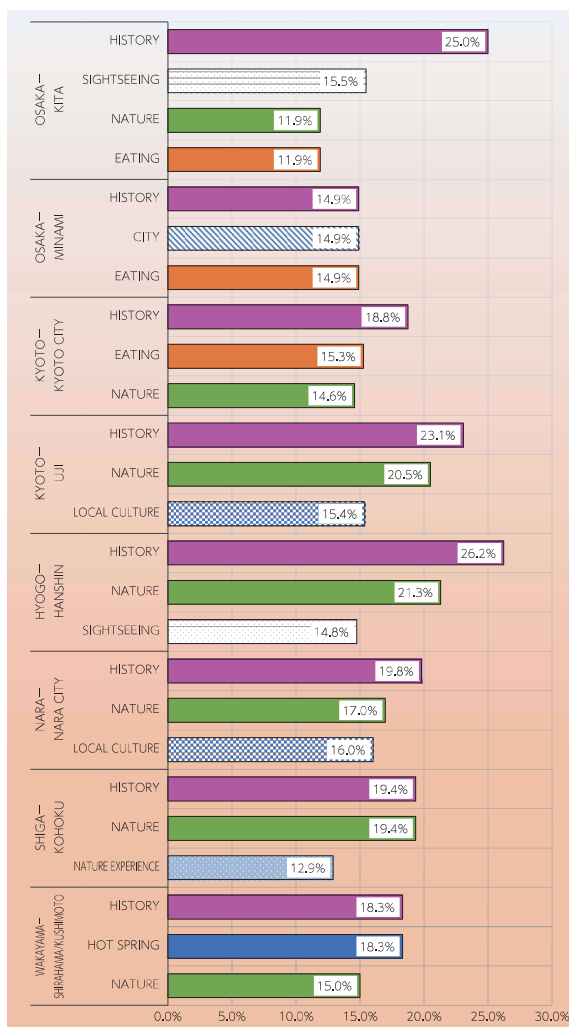


Figure 3-3-5

Comparison of travel purposes of foreign residents (Europe, America, Australia) by area

Source: Compiled by APIR based on the survey results.

### 3. Pre-Visit Expectations and Post-Visit Satisfaction with Tourist Attractions

Section 3.3 presents a comparative and analytical examination of the pre-visit expectations and post-visit satisfaction with each tourist destination. This study focuses on the characteristics of “good atmosphere/comfort of the scenery” and “good food/enjoyment of the food” among the aforementioned travel purposes. The radar chart diagram below illustrates the level of expectation prior to the visit (solid red line) and the level of satisfaction subsequent to the visit (dashed line). It should be noted that there are multiple items pertaining to the level of satisfaction.

#### [Japanese]

For those living in the Kansai region (Figure 3-3-6), expectation and satisfaction levels are generally similar, except in Kyoto and Osaka prefectures, partly because they have a certain level of information on each tourist destination. On the other hand, for those who live outside of Kansai (Figure 3-3-7), there is no significant difference between expectation and satisfaction in Osaka, Kyoto and Hyogo prefectures, but satisfaction is much higher than expectation in Shiga, Nara and Wakayama prefectures. This may be due to the fact that information on

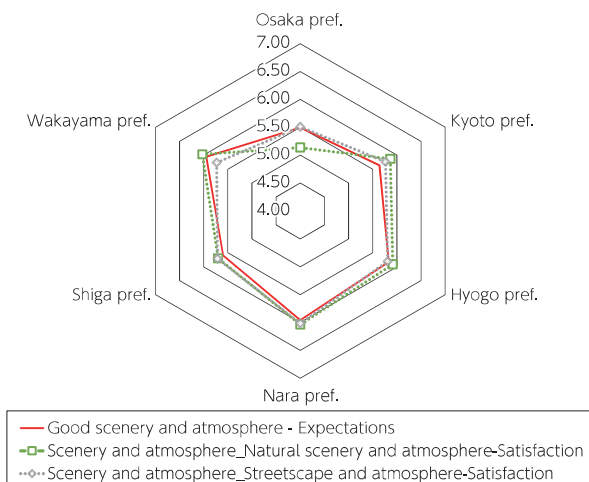


Figure 3-3-6

Expectations and satisfaction with “good scenery and atmosphere/comfort”: Kansai residents

Source: Compiled by APIR based on the survey results.

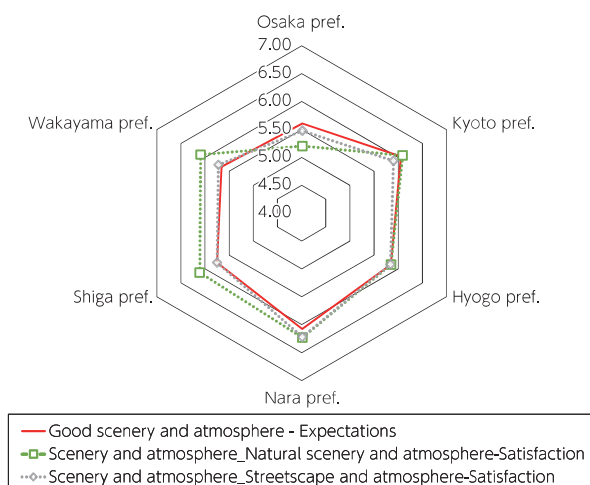


Figure 3-3-7

Expectations and satisfaction with "good scenery and atmosphere/comfort": residents outside Kansai

Source: Compiled by APIR based on the survey results.

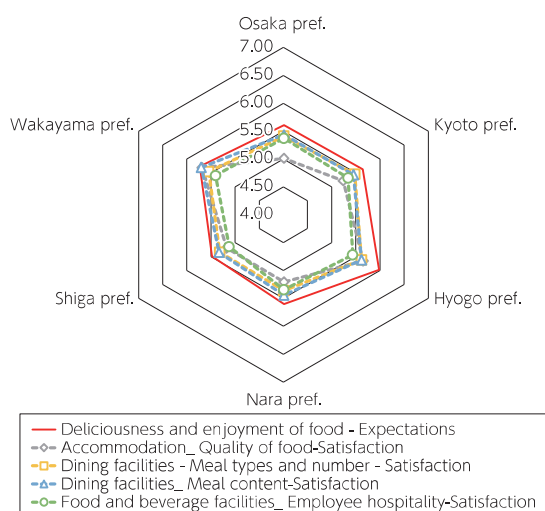


Figure 3-3-8

Expectations and satisfaction with "tastiness and enjoyment of meals": Kansai residents

Source: Compiled by APIR based on the survey results.

natural scenery was not well known in these prefectures compared to Osaka and Kyoto, which may have had a positive impact on satisfaction levels.



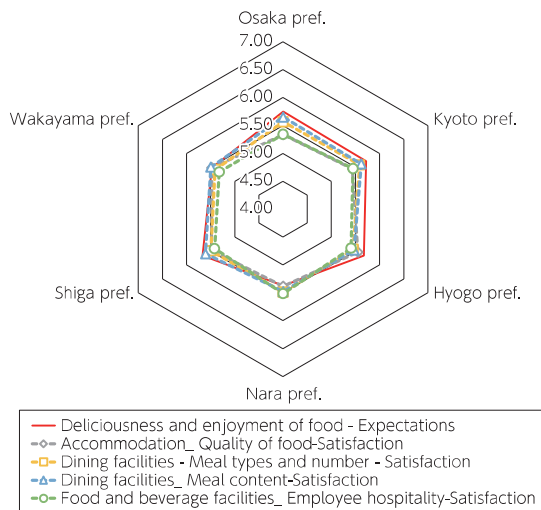


Figure 3-3-9

Expectations and satisfaction with “tastiness and enjoyment of meals”: residents outside Kansai

Source: Compiled by APIR based on the survey results.

Unlike the aforementioned “scenic atmosphere/comfort,” the satisfaction level of “deliciousness/enjoyment of meals” was lower than expected among Kansai residents, although not as high as among non-Kansai residents (Figure 3-3-8). The satisfaction scores of non-Kansai residents were also generally lower than expected (Figure 3-3-9).

### 【Foreign residents】

Figures 3-3-10 (Asia) and 3-3-11 (Europe, the U.S., and Australia) illustrate the correlation between expectations and satisfaction with the “ambience and comfort of the landscape.” In Asia, the level of satisfaction surpassed expectations, whereas in Europe, the U.S., and Australia, the level of satisfaction exceeded expectations in all prefectures except Osaka and Hyogo Prefecture.

Figures 3-3-12 (Asia) and 3-3-13 (Europe, the United States, and Australia) illustrate the pre-visit expectations and post-visit satisfaction regarding the quality and enjoyment of food in lodging facilities, the variety and number of meals at eating and drinking establishments, the food content at eating and drinking establishments, and the hospitality of wait staff at eating and drinking establishments.

As with the aforementioned “scenic atmosphere/comfort,” there was no significant discrepancy between the anticipated and perceived levels of satisfaction

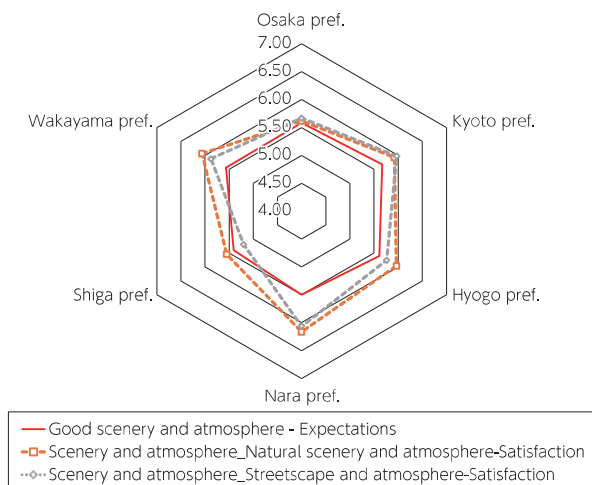


Figure 3-3-10

Expectations and satisfaction with "good scenery and atmosphere/comfort": Asia region

Source: Compiled by APIR based on the survey results.

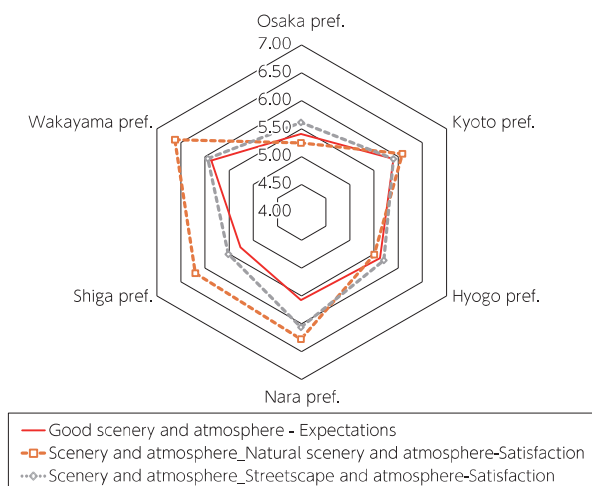


Figure 3-3-11

Expectations and satisfaction with "good scenery and atmosphere/comfort": Europe, America, Australia

Source: Compiled by APIR based on the survey results.

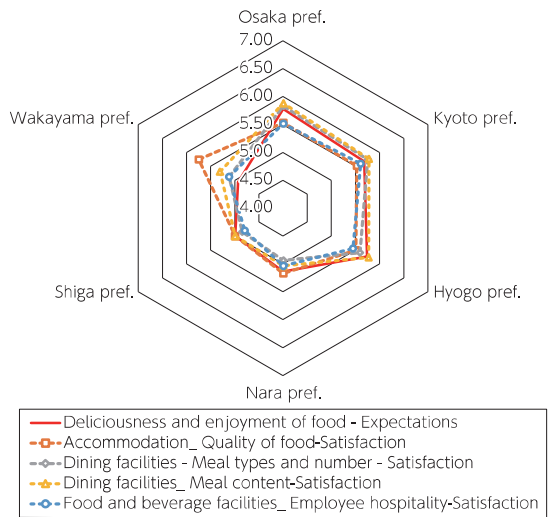


Figure 3-3-12

Expectations and satisfaction with “tastiness and enjoyment of meals”: Asia region

Source: Compiled by APIR based on the survey results.

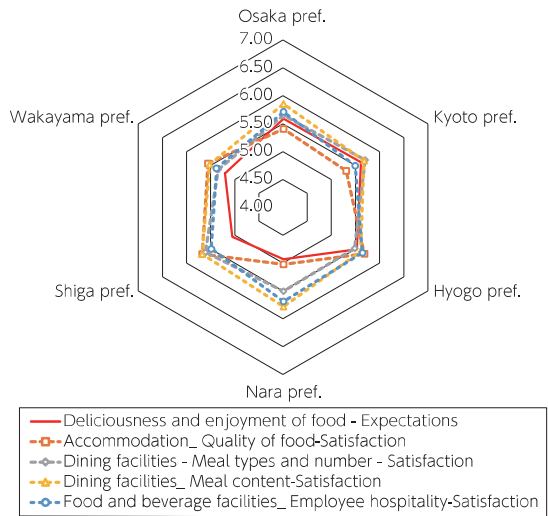


Figure 3-3-13

Expectations and satisfaction with “tastiness and enjoyment of meals”: Europe, America, Australia

Source: Compiled by APIR based on the survey results.

with regard to “good food/enjoyment” in the Osaka and Kyoto Prefectures, as reported by respondents from Asia, the West, and Australia. This is likely attributable, at least in part, to the prefectures’ well-established reputations. Conversely, in Wakayama, Nara, and Shiga Prefectures, the level of satisfaction was markedly higher than the expectation level, particularly among Westerners and Australians.

This may be attributed to the fact that Japanese visitors in Osaka and Kyoto Prefecture have access to certain information prior to their trip, while those in other prefectures visit with limited prior knowledge, which may have a beneficial effect. Furthermore, Japanese and foreign residents hold disparate views on food. The high levels of expectation and satisfaction with Japanese food are noteworthy.

#### 4. An Analysis of Overall Satisfaction with the Places Visited

Section 3.3 presents a comparative analysis of the levels of expectation and satisfaction of tourists prior to visiting a destination. Section 3.4 offers a detailed examination of the three indices: (1) overall satisfaction with the destination, (2) intention to recommend the destination, and (3) intention to revisit the destination. This analysis is conducted separately for Japanese and foreign residents in Japan.<sup>9)</sup>

##### **[Japanese: residents of Kansai]**

A comparison of the overall satisfaction, intention to recommend, and intention to revisit values for Japanese residents in the Kansai region reveals that the Kansai average for the intention to introduce is -0.36 points below the overall satisfaction level and -0.46 points below the intention to revisit, respectively. However, both intentions are at a high level. (Table 3-3-2).

9) The respondents were asked to rate the “results of their stay in the region” on a seven-point scale from “very satisfied (7)” to “very dissatisfied (1),” and the average value was used as the overall satisfaction level. The respondents were also asked to rate on a 7-point scale from “strongly agree (7)” to “not at all disagree (1)” for the questions “would you introduce the respondent’s area to a close friend” and “would you consider visiting the respondent’s area within 2 years?”

Tabel 3-3-2

Levels of overall satisfaction, intention to recommend and revisit, by prefecture: residents of Kansai

	Overall satisfaction (1)	Intent to recommend (2)	Difference = (2)-(1)	Intention to revisit (3)	Difference = (3)-(1)
Osaka pref.	5.88	5.38	-0.49	5.65	-0.22
Kyoto pref.	5.87	5.48	-0.38	5.40	-0.46
Hyogo pref.	6.02	5.66	-0.36	5.56	-0.45
Nara pref.	5.98	5.61	-0.37	5.59	-0.39
Shiga pref.	5.78	5.68	-0.10	5.23	-0.55
Wakayama pref.	6.07	5.59	-0.48	5.35	-0.72
Average	5.93	5.57	-0.36	5.47	-0.46

Source: Compiled by APIR based on the survey results.

### [Japanese: residents outside of Kansai]

The results for Japanese who reside outside of the Kansai region were more pronounced than those for residents of the Kansai region. The discrepancy between the overall satisfaction level and the intention to recommend was -0.28 points, which was higher than that observed among residents of Kansai. Conversely, the discrepancy between the intention to revisit and overall satisfaction was -0.53 points, which was less pronounced than that observed among Kansai residents. Notable differences in evaluations were also observed among the prefectures. Notably, the variation was particularly pronounced with regard to the intention to return. (Table 3-3-3).

Table 3-3-3

Levels of overall satisfaction, intention to recommend and revisit, by prefecture: residents outside Kansai

	Overall satisfaction (1)	Intent to recommend (2)	Difference = (2)-(1)	Intention to revisit (3)	Difference = (3)-(1)
Osaka pref.	5.78	5.59	-0.19	5.51	-0.27
Kyoto pref.	5.93	5.87	-0.07	5.66	-0.27
Hyogo pref.	5.82	5.56	-0.26	5.20	-0.61
Nara pref.	6.19	5.83	-0.36	5.78	-0.41
Shiga pref.	5.92	5.55	-0.38	5.31	-0.61
Wakayama pref.	5.98	5.33	-0.65	4.37	-1.61
Average	5.92	5.64	-0.28	5.39	-0.53

Source: Compiled by APIR based on the survey results.

### [Foreign residents: Asia]

A review of the data reveals that foreign residents of Asia exhibit high levels of satisfaction and intention to recommend the service. Additionally, the intention to revisit is comparable to that of individuals residing outside of Kansai, with

notable discrepancies in the results. (Table 3-3-4).

**Table 3-3-4**

Levels of overall satisfaction, intention to recommend and revisit, by prefecture: Asia region

	Overall satisfaction (1)	Intent to recommend (2)	Difference = (2)-(1)	Intention to revisit (3)	Difference = (3)-(1)
Osaka pref.	6.03	6.07	0.03	5.35	-0.68
Kyoto pref.	6.08	5.90	-0.18	5.63	-0.45
Hyogo pref.	6.03	6.21	0.18	5.35	-0.68
Nara pref.	6.27	6.20	-0.07	5.47	-0.80
Shiga pref.	5.45	6.05	0.60	4.50	-0.95
Wakayama pref.	6.00	6.00	0.00	4.94	-1.06
Average	6.02	6.07	0.06	5.31	-0.71

Source: Compiled by APIR based on the survey results.

### 【Foreign residents: Europe, U.S. and Australia】

A comparative analysis of foreign residents of Europe, America, and Australia reveals that both the intention to recommend the destination and the overall satisfaction are high. Notably, the intention to revisit is the highest among all regions, with a score of 5.78. This is significantly higher than the intention to revisit among Asian residents, both those living in Kansai and those living outside Kansai (Table 3-3-5).

**Table 3-3-5**

Levels of overall satisfaction, intention to recommend and revisit, by prefecture: Europe, America, Australia

	Overall satisfaction (1)	Intent to recommend (2)	Difference = (2)-(1)	Intention to revisit (3)	Difference = (3)-(1)
Osaka pref.	6.20	6.08	-0.12	5.67	-0.53
Kyoto pref.	6.16	6.12	-0.04	5.86	-0.31
Hyogo pref.	5.84	5.84	0.00	5.64	-0.20
Nara pref.	6.09	6.33	0.24	5.91	-0.18
Shiga pref.	5.88	6.19	0.31	5.88	0.00
Wakayama pref.	6.11	6.46	0.36	5.75	-0.36
Average	6.09	6.17	0.08	5.78	-0.31

Source: Compiled by APIR based on the survey results.

## 5. A Preliminary Study: Tours Based on Visitor Characteristics

The tour plans have heretofore been based on geographical proximity. In Section 3.5, a novel tour plan is presented, which is based on the attributes of travelers. Specifically, the three most intriguing travel purposes from each region were identified and a tour plan connecting them was proposed.

### [Residents of Kansai]

The three most common purposes for Kansai residents are (1) “history, culture, nature and food,” (2) “urban sightseeing and shopping,” and (3) “hot springs.” The interconnectivity between these regions is illustrated in [Reference Figure 3-3-1A](#).

In the “History, Culture, Nature and Food” group (depicted by the purple route in [Reference Figure 3-3-1A](#)), visitors who traveled to the Kyoto City area demonstrated a proclivity to visit the Uji area for the same purpose<sup>10)</sup>. In Nara Prefecture, the Nara City area, the Ikaruga area, and the Yoshino/Asuka area correspond to the aforementioned areas. Similarly, in Shiga Prefecture, the Kohoku area, the Koto area, and the Koyasan area in Wakayama Prefecture correspond to these areas. For example, the “Tale of Two Ancient Cities Route,” which connects Nara and Kyoto, the “Osaka Route,” which connects Shiga and Kyoto, and the “Mountain, Water and Light Corridor Route” (see *Hieizan-Biwako DMO*) are all notable routes.<sup>11)</sup>

A review of the “Onsen” group (depicted in blue in [Reference Figure 3-3-1A](#)) reveals that the Tango area in Kyoto Prefecture, the Nantan area, and numerous locations in Hyogo Prefecture align with this group. It can thus be proposed that a new excursion route be established by connecting the various hot spring resorts in the Kansai region. As an illustration, the “*Teku-Teku Hyogo Hot Springs Tour*,” as proposed by Hyogo Prefecture, can be classified within this category. An alternative route would be to visit hot spring camps recommended by the *Mori no Kyoto DMO* and hot spring resorts recommended by the *Umi-no-Kyoto DMO* in Kyoto Prefecture. This analysis also proposes a route that connects these areas over a wide area. The “urban sightseeing and shopping” group (orange route in [Reference Figure 3-3-1A](#)) includes all areas in Osaka Prefecture and the Otsu area in Shiga Prefecture. For the group whose main purpose is urban sightseeing and shopping, this route will be a comprehensive tour that encompasses various activities, including sightseeing, shopping, and dining, while also providing an opportunity for visitors to experience the local culture and satisfy their interests.

### [Residents outside of Kansai]

Those residing outside of Kansai were classified into three distinct groups,

10) As mentioned in Section 3, “Overtourism in Kyoto City,” the solution to this problem is to create a program that promotes travel along the routes shown in this section.

11) For more information on the Mountain, Water and Light Corridor, please refer to the Hieizan-Biwako DMO website (<https://www.hieizan.gr.jp/>).

which exhibited some divergence from the profiles of those residing in Kansai. The first category, “history culture, nature and food,” encompasses sites associated with Japan’s rich history and natural environment, including traditional cuisine and local produce. The second category, “urban sightseeing and shopping,” includes attractions in major cities such as Tokyo and Osaka, as well as shopping districts. The third category, “richness of nature (including hot springs),” features natural hot springs and other attractions related to Japan’s natural environment. (See [Reference Figure 3-3-1B](#).)

The “History, Culture, Nature and Food” route (depicted in purple in [Reference Figure 3-3-1B](#)) encompasses Kyoto City and the Tango area, as well as Nara Prefecture, the Kohoku and Otsu areas in Shiga Prefecture, and the Koyasan area in Wakayama Prefecture. This route is thus more extensive in scope. These areas are home to numerous shrines and temples, and the Shimbutsu Reijo-kai (2008) can be consulted as a reference for the route connecting these areas.

The “Urban Sightseeing and Shopping” group encompasses the Osaka area, the Uji area in Kyoto Prefecture, and the Hanshin, Himeji, and Bantan areas in Hyogo Prefecture. The “City Sightseeing and Shopping” group encompasses the Osaka area, the Uji area in Kyoto Prefecture, and the Hanshin, Himeji, and Bantan areas in Hyogo Prefecture.

The group that experienced the “richness of nature (including hot springs)” included the Awaji Island area in Hyogo Prefecture, the Nantan area in Kyoto Prefecture, and the Shirahama/Kushimoto and Kumano areas in Wakayama Prefecture. The Shirahama/Kushimoto area is the sole region that tourists primarily visit for the purpose of enjoying hot springs. Consequently, if this is included in the “experience of natural riches,” the route would be as shown above (red route in [Reference Figure 3-3-1B](#)). This route is regarded as the “enjoy hot springs and glamping” route recommended by each region.

### 【Foreign residents】

The travel purposes of foreign residents were divided into three groups: (1) “Historic sites and local culture,” (2) “Historic sites, tourist and cultural facilities, and food,” and (3) “Richness of nature (including hot springs)” ([Reference Figure 3-3-2](#)).

The group that experiences “Historic Sites and Local Culture” includes the Tango and Uji areas in Kyoto Prefecture, the Nara City area in Nara Prefecture, and the Hanshin area in Hyogo Prefecture. This route is considered to be one that allows visitors to visit historic sites and enjoy local culture (green route in [Reference Figure 3-3-2](#)).



The group that experiences “Historic Places and Historic Sites, Sightseeing and Cultural Facilities, and Food” are located in the Kita, Bay, and Minami areas in Osaka Prefecture and the Kyoto City area in Kyoto Prefecture. This is a golden route that allows visitors to enjoy not only food but also historic sites and places of interest (yellow route in [Reference Figure 3-3-2](#)).

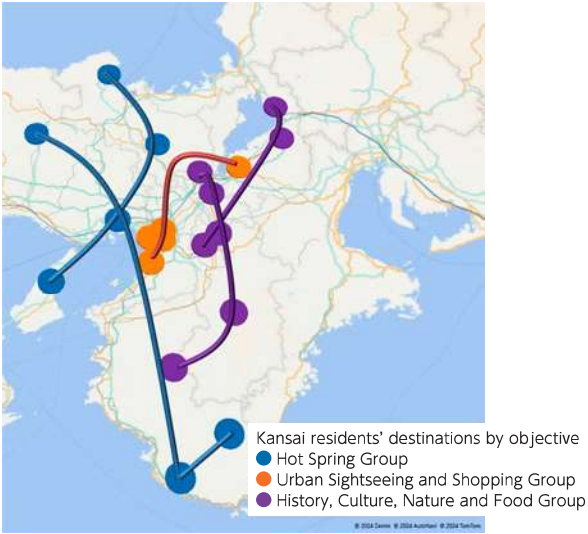
The group that experiences “richness of nature (including hot springs)” includes the Kohoku area in Shiga Prefecture and the Shirahama/Kushimoto area in Wakayama Prefecture. Although the two areas are not near each other, they share a common interest in experiencing natural scenery and natural activities (see the blue route in [Reference Figure 1-2](#)). The route is unlikely to be considered by Japanese people, but it is a route to which foreigners can relate.

In Section 3, we proposed a Kansai-wide sightseeing tour plan based on the stated purpose of the trip as a preliminary study. The most common activities among Japanese tourists are dining, urban exploration, and shopping. Conversely, alternative itineraries may be contemplated for residents of Kansai and those residing outside of the region. In other words, the former is “hot springs” and the latter is additionally “experiencing the richness of nature.”

We can recommend routes that allow foreign residents to experience local culture and the richness of nature. However, although these routes connect geographically distant areas, they are considered acceptable from the perspective of the objectives of foreign residents.

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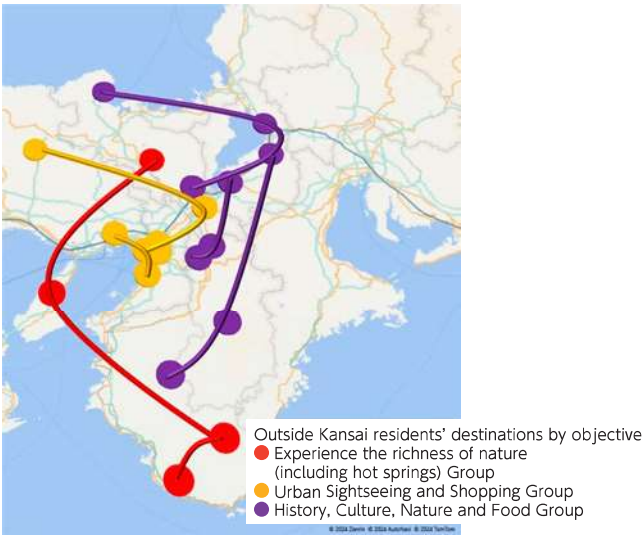
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Reference Figure 3-3-1 A

Destinations by purpose: Kansai residents

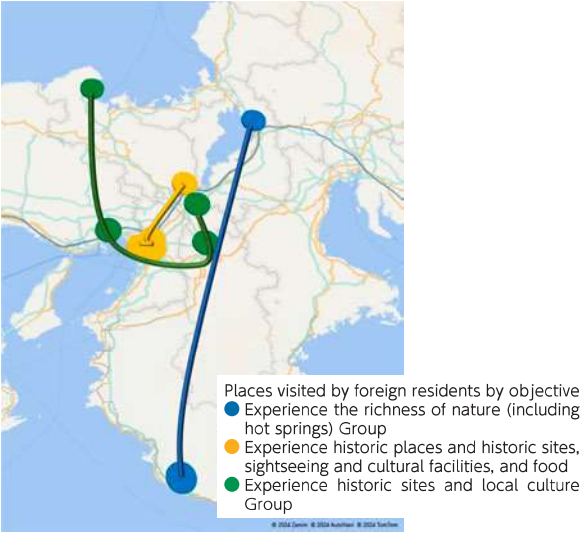
Source: Compiled by APIR based on the survey results.



Reference Figure 3-3-1 B

Destinations by purpose: residents outside of Kansai

Source: Compiled by APIR based on the survey results.



Reference Figure 3-3-2

Destinations by purpose: foreign residents

Source: Compiled by APIR based on the survey results.