



TEJ Conference Report

Keynote speech The 8th TEJ Ministerial Roundtable

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* Panelists' affiliations and titles are indicated as at the time the Conference was conducted.





Keynote Speech

Let's lose our way, together.



Mr. Kiyofumi Nakajima
Chief Operating Officer
STUDIO GHIBLI INC.

Studio Ghibli is a company that produces animation centered around Directors Isao Takahata and Hayao Miyazaki. We currently operate the Ghibli Museum in Mitaka, Tokyo and Ghibli Park in Nagakute, Aichi. Today, I would like to share with you the journey of Studio Ghibli and talk about our philosophy behind the construction and operation of the Ghibli Museum and Ghibli Park.

The Journey of Studio Ghibli

Studio Ghibli's first film was "Nausicaä of the Valley of the Wind," released in theaters in 1984. Prior to that, Director Hayao Miyazaki had directed the

television anime series "Future Boy Conan" for NHK (Japan Broadcasting Corporation) in 1978, followed by his first feature film "Lupin III: The Castle of Cagliostro" in 1979. However, "Future Boy Conan" had poor ratings, and "The Castle of Cagliostro" also did not perform well at the box office. The trend at the time favored stylish sci-fi fantasy animations such as Space Battleship Yamato, Captain Harlock, and Galaxy Express 999. In contrast, Miyazaki's style—blending slapstick comedy with a joyful spirit in animated films—was avoided by young people of the era. They called it "Western-influenced animation," and we went through a period where good ratings were hard to achieve.

Because of this, even though Miyazaki had created plans that would later become “My Neighbor Totoro” and “Princess Mononoke,” no one picked them up. It was during this time that he met Toshio Suzuki, who is now our producer at Studio Ghibli. Suzuki, then editor-in-chief of the magazine “Animage,” became close to Miyazaki and featured him in special issues. However, the reality was that whenever the magazine featured Miyazaki, its sales dropped. Despite this, Suzuki continued to support Miyazaki, by serializing the manga “Nausicaä of the Valley of the Wind” in “Animage.” When this manga became popular, it was finally approved for film adaptation, and we were able to produce the movie at last. We never imagined at that time that Studio Ghibli would last for 40 years. The creation of “Nausicaä” simply stemmed from Suzuki’s desire to let “Miya-san” (as he calls Miyazaki) make just one film.

Our next film, “Castle in the Sky,” was released in 1986, but during its production, no one was willing to cooperate. “Nausicaä” had been produced using a borrowed studio called Topcraft, but that company went bankrupt. Producer Isao Takahata and Director Miyazaki would sweep everyone along with their overwhelming passion and energy, but by the end of production, the company was left in tatters. As a result, no one agreed to take on the next project, so we had no choice but to establish our own company—that is how Studio Ghibli was

formed. We founded Studio Ghibli in 1985 to create our own company, gather staff, and produce films ourselves, beginning with the production of “Castle in the Sky.”

Thanks to everyone’s support, we have managed to run for 40 years, but our next works had the poorest box office performance in our entire history. These were the double feature of “My Neighbor Totoro” and “Grave of the Fireflies,” both films depicting Japanese landscapes. As you can see, both posters were dark and somber. Naturally, film industry professionals were very angry, asking “Do you think films with such dark-colored posters will be hits?” But we stubbornly went ahead with the release, and indeed, the box office performance was poor. However, “Grave of the Fireflies” remains highly regarded even 37 years later. This year, marking the 80th anniversary of the end of World War II, NHK created a documentary, an Isao Takahata exhibition was held in Azabudai, Tokyo, and the film was broadcast on Nippon Television on August 15th, the anniversary of the war’s end, receiving high acclaim during this milestone year.

On the other hand, although “My Neighbor Totoro” did not do well in theaters, it swept the animation awards at the end of 1988, winning the Anime Grand Prix, the Ofuji Noburo Award at the Mainichi Film Awards, and first place in Kinema Junpo’s Japanese films of 1988. The following year, when it was broadcast on television, it achieved very high ratings.

During the broadcast, the phone kept ringing with complaints like “The children won’t go to sleep!” and “Why are you showing this at 9 o’clock in the evening?” Eventually, the person in charge retorted, “That sounds like a problem at home!” which became one of our funny anecdotes. Despite its poor box office performance, it has now become Studio Ghibli’s trademark, and we are extremely happy that it is beloved to the point where “practically every household has a copy of ‘My Neighbor Totoro’ on video or DVD.”

After producing “Nausicaä” in 1984, “Castle in the Sky” in 1986, and “My Neighbor Totoro” and “Grave of the Fireflies” in 1988, Director Miyazaki began saying he wanted to stop because “making three films makes you lose friends.” Producer Toshio Suzuki convinced him, saying “Since we’ve come this far, let’s continue,” and they made “Kiki’s Delivery Service.” Miyazaki set out three conditions for production that strongly envisioned the studio’s future: making all staff full-time employees, hiring and training new talent, and transferring Suzuki to Studio Ghibli.

In the 1990s, we released films like “Only Yesterday,” “Porco Rosso,” and “Pom Poko” in theaters, but each time we had to compete with Disney films that were achieving worldwide hits such as “The Lion King” and “Aladdin.” Fortunately, at least in Japan, Ghibli continued to outperform Disney. As a result, a business partnership with Disney

was formed before the theatrical release of “Princess Mononoke.”

“Princess Mononoke” and Global Expansion

“Princess Mononoke” (1997) differed from traditional children’s animation, by portraying the grand worldview of the conflict between nature and humanity. We wondered whether it was truly suitable as summer entertainment for children. Furthermore, from this work onward, Director Miyazaki spent as long as two years on production. This was because the artwork was extremely elaborate, but spending two years meant the production costs would double the usual amount. With costs doubling and the theme being difficult, we worried whether it would be successful. However, as mentioned earlier, through our business partnership with Disney, we conducted major publicity for worldwide distribution, and “Princess Mononoke” became a huge hit with 14.2 million people viewing it in Japanese theaters. “Princess Mononoke” was successfully released in North America and subsequently distributed worldwide with the help of Disney and others.

Our global expansion paid off with our next film, “Spirited Away” (2001), which won the Academy Award for Best Animated Feature. Within Disney, there were teams supporting “Lilo & Stitch” and “Spirited Away,” and when “Spirited Away” won, it caused quite a stir within

the company. With this award, Studio Ghibli became a company that produces works for global audiences. We continued with “The Cat Returns” (2002), “Howl’s Moving Castle” (2004), “Tales from Earthsea” (2006), “Ponyo” (2008), “The Secret World of Arrietty” (2010), and “From Up on Poppy Hill” (2011). Then in 2013 came “The Wind Rises,” the work for which Hayao Miyazaki declared his retirement, and “The Tale of Princess Kaguya” (2013), which became Isao Takahata’s final work.

Director Miyazaki’s Retirement Announcement and Company Restructuring

After the release of “The Wind Rises,” Director Miyazaki announced his retirement, saying, “This time I’m serious.” Following his announcement, the production department was disbanded, leaving Studio Ghibli without a production division. What should we do? To keep operating without making films, we shifted to businesses like publishing, merchandise sales, nationwide touring events and exhibitions, international expansion, and the operation of the Ghibli Museum and Ghibli Park.

We undertook various initiatives based on the assumption that Miyazaki had retired. Despite claiming “This time I’m serious,” however, he picked up his pen again three years later. After working on short animations, he developed a desire to

create a feature film. Four years after declaring his retirement, he resumed film production, spending seven years to complete “The Boy and the Heron” in July 2023. This was Miyazaki’s first new work in 10 years, received worldwide acclaim, won an Oscar, and brought us to where we are today.

What we learned from this experience is that even though we considered expanding into various businesses, Studio Ghibli is fundamentally a company that produces animation centered around Director Miyazaki. Everything else—publishing, merchandise, the Ghibli Museum, and Ghibli Park—serves as an extension of this, as ways of realizing and expressing Miyazaki’s vision. “The Boy and the Heron” made us recognize this once again.

The Birth and Philosophy of the Ghibli Museum

The Ghibli Museum is located in Mitaka, Tokyo. With the establishment of this museum, Mitaka became a destination visited by many people. The museum’s construction began as a response to Studio Ghibli’s pressing need to support aging animators. This concern arose during the production of “Princess Mononoke” when Director Miyazaki declared his retirement, and we realized that animators who had worked alongside him were aging.

Initially, we planned to run



merchandise shops to support the livelihood of elderly animators, but we faced opposition with people saying, “Don’t underestimate retail.” We got the hint that “if there is a facility that attracts visitors first, and then shops selling merchandise there, the goods will sell,” which led us to consider a museum’s development seriously. When Hayao Miyazaki becomes involved, his thoroughness is extraordinary. First, he toured museums nationwide and compiled their characteristics:

1. Generally intimidating buildings, modern architecture that can overwhelm people.
2. Dark and quiet inside, with low temperatures.
3. Typically asking visitors to follow a

guided route with explanations, reading along until they somehow understand by the end.

4. Visitors (except for special exhibitions) are mostly art enthusiasts or art students—experts in the field. As a result, most facilities are empty.

As an entertainer, Miyazaki disliked the intimidating buildings, dark and quiet spaces, and fixed routes of typical museums, thinking “Why don’t we just do everything in reverse?”

Miyazaki also said he wanted to “create the building like a movie,” designing experiences where visitors’ hearts would be moved through various spaces from the entrance gate, much like following a movie’s storyline.

His passionate vision for “the kind of

museum we want to create” included:

- A touching museum that warms the heart
- A museum where you can discover various objects
- A museum built on a solid foundational philosophy
- A museum where people can enjoy, think, or feel whatever they want.
- And a museum where visitors leave with hearts a little more enriched than when they arrived.

In the end, what was meant to be a measure for aging animators led us to hire many new young staff to run the museum.

Our operational philosophy is built on three key principles:

1. Demonstrating authenticity as a children’s museum: We want children to touch, see, and feel genuine objects. We hope they will take home at least one memory when they leave.
2. Conveying craftsmanship: We showcase the actual processes behind how Studio Ghibli creates films and items crafted with sincerity by artisans. We want visitors to see and experience the process of how things are made through time and effort.
3. Coexistence with the park and nature: Located in a corner of Inokashira Park, we blend into the greenery around us. The hedge height allows people to sense others’ presence without completely blocking the view, so we can feel

each other’s existence.

Director Miyazaki did not want it to be “a museum only for Ghibli fans,” and we run it not as a character museum but as a cultural space that shares our passion for craftsmanship and aims to be a museum for kids.

To ensure a comfortable viewing environment, we limit daily admissions to 2,400 people and operate by reservation. However, with the rise of international visitors, the Ghibli Museum’s capacity of 2,400 could not meet everyone’s expectations and desires. That is when the idea of Ghibli Park was born.

The Birth and Philosophy of Ghibli Park

When the Ghibli Park proposal came up, Miyazaki said for the first time that he would consider building a theme park. Among various candidate locations, Governor Omura of Aichi Prefecture’s persistent visits, despite repeated rejections of the invitation, became a significant catalyst. Aichi Prefecture’s connection began with “Satsuki and Mei’s House” from “My Neighbor Totoro,” created as one of the pavilions for the 2005 Aichi Expo (Expo 2005 Aichi).

This “Satsuki and Mei’s House” aligned with the environmental expo’s theme—representing a building from a time when people lived cyclically without air conditioners, washing machines, or refrigerators, and genuinely built using early Showa period methods without

concrete or other modern materials. After the expo, despite various invitations from different places, we could not give it to anyone, so it remained under Aichi Prefecture's management and operation. It became a beloved place visited by 100,000 people annually. After repairs made for an event ten years after the expo, Governor Omura approached us and asked, "Could you do more than just 'Satsuki and Mei's House'?" This led to the beginning of Ghibli Park.

Expo 2005 Aichi Commemorative Park is located on the expo site but was originally a youth park from the 1970s. We received calls from local seniors saying, "That place is where we camped as kids, where we caught crayfish. It's an important place of memories, so please do it properly." However, when we visited on weekdays, there were no people there. So, our first focus was to bring life back to the park and "make it a place of memories once again." We wanted it to be a place that everyone in Aichi visits at least once as a child and still talks about as adults.

Our second goal was to create a place where "when you come here, you remember Ghibli again" and "you want to watch Ghibli films again."

Our third ambition, suggested by Producer Suzuki who named it "Ghibli Park," was to "make it a city park that tourists would also visit."

Ghibli Park consists of five areas:

Dondoko Forest: Since "Satsuki and Mei's House" cannot accommodate

many people at once, we created things like small forest shrines for outdoor enjoyment, inviting everyone to come play here.

Valley of Witches: "Satsuki and Mei's House" was an authentic early Showa building, so next we decided to genuinely and sincerely build Western structures based on European works (Guchokipanya Bakery from "Kiki's Delivery Service," The House of Witches from "Earwig and the Witch").

Ghibli's Grand Warehouse: Renovated from an indoor pool facility, it now serves as a display space for items taken from Ghibli studio storage. Without a specific theme, a variety of Ghibli items can be seen and photographed here. It's so popular that visitors wait an hour to take photos with No-Face from "Spirited Away."

Hill of Youth: We built a clock tower as the area's landmark, with the antique shop "Chikyu-ya" from "Whisper of the Heart" next to it.

Mononoke Village: Located next to Satolabo, a facility for creating satoyama landscapes, we established "Mononoke Village" (Emishi Village) and the Ironworks to complement the scenery.

Three areas opened in November 2022, followed by sequential openings in November 2023 and March 2024, and thankfully, all five areas are now open.



With these five areas scattered throughout the park, we hope it becomes a place where visitors can explore freely and everyone smiles everywhere.

Finally, the biggest difference between the Ghibli Museum and Ghibli Park is their daily visitor numbers. While the Ghibli Museum welcomes 600,000 visitors each year, Ghibli Park attracts about three

times that number. The Ghibli Museum is a small facility that meets local demand, but because of its location and population factors, Ghibli Park depends heavily on both domestic and international tourists—about 70% rely on tourism.

Using Aichi Prefecture's phrase, we aim to promote "Aichi with Ghibli Park" and attract many visitors to Ghibli Park.

The 8th TEJ Ministerial Roundtable World Tourism Leaders Unite in Aichi for Planning

Collaboration



Driving Regional Transformation - Destination Diversification and Human Resource Development

Opening Remarks

The 8th TEJ Ministerial Round Table welcomed tourism leaders from seven countries and six international organizations to discuss “regional transformation” for a sustainable future. We recognize that global tourism has recovered and entered a new transformation period, which calls for investment in human resources, infrastructure, destination diversification, and digital transformation to support community livelihoods while promoting local culture, gastronomy, fashion, and storytelling—elements central to our diversification discourse.

The pandemic fundamentally transformed tourism perspectives, as people discovered nearby destinations accessible by car rather than plane, which makes local, authentic experiences a key unique selling proposition. The UN initiative now supports countries in tourism investment and business development to broaden the benefits, recognizing that regional transformation must deliver economic growth, resilience, sustainability, and human connections.

This shift offers opportunities to promote community-based tourism that preserves cultural identity while generating economic benefits. Collective efforts are essential for sustainable tourism transformation, benefiting both local communities and global sustainability objectives.



Ms. Zoritsa Urošević
Executive Director
UN Tourism



Moderator

Japan

Finding Optimal Balance is Key to Ongoing Regional Growth

Ms. Marjorie Dewey

President, Connect Worldwide Japan Co., Ltd.



Moderator

As countries worldwide tackle the 17 SDG targets by 2030, “transformation” is recognized as key to managing sustainable tourism. It involves multiple domains: the regional environment, economy, investment, human resources, digital innovation, local networks, and socio-cultural elements. Finding and maintaining optimal balance of these factors is crucial for long-term, stable regional growth. Success requires coordinating diverse stakeholder interests while preserving authenticity and natural resources. The challenge lies in harmonizing economic development with environmental protection, technological advancement with cultural preservation, and tourism expansion with community well-being. A holistic approach ensures tourism contributes to regional development without compromising future generations’ opportunities.

Panelists



TC
Sarah Wang

Strong Public-Private Partnerships Drive Tourism Growth

Ms. Sarah Wang

Regional Director – Asia, World Travel & Tourism Council (WTTC)

WTTC CEO Julia Simpson highlighted in her video message the importance of public-private sector collaboration for destination diversification and regional transformation to ensure tourism benefits everyone. Strong partnerships are crucial for sustainable and inclusive tourism growth, enabling the industry to strike a balance between rapid expansion and environmental responsibility and cultural preservation. Japan exemplifies this approach, with tourism expected to contribute to 8% of GDP in 2025. Through effective collaborations between government and private sectors, destinations can develop diverse offerings that disperse tourist flows, protect heritage sites, and ensure equitable economic benefits for local communities. This collective effort transforms tourism into a force for positive change, creating better futures for all stakeholders while preserving the authentic experiences that make each destination unique and valuable in the global tourism landscape.

Ms. Sarah Wang pointed out in her remarks that tourism faces post-pandemic workforce shortages. WTTC’s strategy emphasizes three pillars: empowering indigenous communities as hosts of authentic cultural experiences; attracting youth by showcasing diverse career opportunities beyond traditional roles; and integrating AI to enhance rather than replace workers, following Japan Airlines’ model. Success requires comprehensive investment in education, university partnerships, and supportive ecosystems to build a resilient, inclusive, future-ready workforce for sustainable tourism growth.

Panelists



Destination Diversification and Regional Cooperation for Resilient Tourism **H.E. Mr. Huot Hak**

Minister of Tourism, Kingdom of Cambodia

Tourism destinations require diversification. By leveraging tourism resources from multiple perspectives and providing various experiences to visitors, we aim to disperse tourist flows, protect World Heritage sites, and ensure equitable economic benefits for local communities. This approach necessitates infrastructure investment, community participation, and development of new tourism routes through public-private partnerships with strong inter-regional coordination.

However, destination diversification cannot be achieved in isolation, as tourism flows are inherently regional. Regional cooperation requires three key initiatives: first, joint marketing campaigns promoting multi-country itineraries to encourage longer stays and higher spending; second, skill development through sharing best practices and coordinating human resource development; third, establishing regional tourism observatories for data exchange to guide evidence-based policy decisions.

Furthermore, Cambodia believes it must collaborate with neighboring countries to promote multinational tourism routes, harmonize tourism standards, and share knowledge on digital utilization. Countries like Cambodia demonstrate deep commitment to such regional collaboration, working with ASEAN and sub-regional partners. These collective approaches will create more resilient tourism ecosystems that benefit all stakeholders while preserving cultural and natural heritage for future generations, ensuring that regional transformation delivers not just economic growth but sustainable development for all communities involved.



Hidden Regional Charms of the Silk Road

H.E. Mr. Aziz Abdulkhakimov

Minister of Ecology, Environmental Protection and Climate Change
Republic of Uzbekistan

Uzbekistan, a Silk Road nation, welcomes 10 million foreign tourists annually, generating revenue of more than \$3 billion and employment for several hundred thousand people. This success stems from visa liberalization, expanded transportation networks, and new destination development.

Uzbekistan believes tourism must respect authenticity and local traditions. Beyond UNESCO World Heritage sites like Samarkand, Bukhara, and Hiva, the country promotes nature in its regions and cultures in small villages. Previously focused solely on cultural and historical tourism, Uzbekistan now invests heavily in mountain and desert infrastructure while diversifying into eco, gastronomic, and agro tourism.

A particularly innovative approach is family or ethno tourism through guest houses in remote villages, where visitors spend days experiencing national culture, customs, cuisine, and even agricultural work. These initiatives create jobs and income for locals in areas lacking infrastructure, exemplifying sustainable green tourism.

The country pursues its tourism strategy Uzbekistan 2030 through the “UzStainable” campaign, implementing eco standards for hotels, solar panels at tourist sites, and restoration projects. Uzbekistan views destination diversification as a pathway to sustainable economic growth, social fairness, and intercultural understanding, showcasing authentic local experiences while ensuring responsible development that benefits communities nationwide.

Panelists



Toward Regenerative “Meaningful Tourism”

Mr. Peter Semone

Chairman, Pacific Asia Travel Association (PATA)

Understanding supply and demand is essential for tourism diversification and resource development. PATA supports countries' appropriate market responses by clarifying regional, cultural, and natural resource uniqueness through “tourism asset mapping.” The Asia Pacific region functions as the world's best real estate—a living museum with exceptional assets yet remains vulnerable to tourism's negative impacts.

Recognizing that overtourism challenges focus disproportionately on visitor numbers, PATA is developing “meaningful tourism” with new KPIs evaluating environmental and economic impacts beyond quantity metrics. Ministers face pressure to deliver numbers, but sustainable success requires engaging heads of state to redefine tourism metrics, shifting from quantity to quality.

This comprehensive regional approach involves extensive collaboration and coordination between countries over decades. Key challenges include maintaining product consistency while identifying multi-country route opportunities. Working with local communities, especially in areas without established visitor economies, requires introducing tourism from basic levels, developing understanding of both benefits and risks.

By promoting strategies that evaluate deeper criteria and foster regional cooperation, this approach ensures tourism creates genuine value for destinations while preserving authenticity and resources for future generations. This transformation enables ministers and stakeholders to pursue sustainable goals that maximize benefits while protecting the region's exceptional assets.



Changing Travel Market Values: Regional and Industry Reform

Dr. Aladdin D. Rillo

Managing Director for Policy Design and Operations
Economic Research Institute of ASEAN and East Asia (ERIA)

ASEAN tourism has recovered remarkably from the pandemic, but market dynamics and industry structure have undergone significant transformation. With sustainability as the foundation, safety aspects are of greater importance, and digitalization is crucial throughout the sector. Governments and destinations must understand evolving market changes and diverse consumer needs to create meaningful, valuable travel experiences.

Value proposition is essential for destination diversification, requiring three key factors: ensuring high consumer value positioning, aligning governance structures with tourist expectations, and knowledge sharing to build sector vibrancy. Successful diversification centers on providing value determined by sustainability, safety, and creating meaningful tourist experiences.

However, digital transformation faces critical challenges. All tourists, visitors, and operators face cyber threats that could undermine regional tourism unity. Countries must address cyber security while ensuring interoperability through standardized regulations for cross-border digital payments, e-visas, and integrated platforms essential for regional tourism.

Without addressing these constraints—cyber security, regulatory frameworks, and technical standards—digital transformation remains merely a buzzword. Effective tourism transformation requires comprehensive regional reform initiatives, proper governance structures, strategic information sharing, and readiness to tackle digital infrastructure challenges. This holistic approach ensures diversification meets tourist needs while promoting sustainable development and secure, seamless cross-border tourism experiences.

Panelists



Regional Messaging and Strategic Investment for Balanced Tourism **Ms. Dubravka Kalin**

Director General of the Tourism Directorate, Republic of Slovenia

In tourism today, creating added value matters more than pursuing visitor numbers. Slovenia's many small tourism businesses effectively communicate regional stories and authenticity. However, with 6.6 million annual tourists for a population under 2 million, Slovenia faces geostrategic challenges requiring diversified, resilient tourism that views the country as a “living room” with rules for guests.

Slovenia shifted from chasing numbers to pursuing higher value and from marketing to destination management. Starting 15 years ago with their green scheme using international certificates, Slovenia upgraded through digital transformation. Launched in June, their digital analytical tool makes Slovenia one of the world's most measured countries, with 270 databases tracking tourism impacts.

This comprehensive system measures environmental and societal effects, analyzes and forecasts tourism flows to prevent hotspots and overtourism, and enables data-driven decision-making using AI, big data, and AR/VR technologies. Slovenia is “making stories out of data” while investing in infrastructure and products focusing on wellness, regeneration, and longevity programs.

By empowering destination management organizations and developing both products and supporting infrastructure, Slovenia transforms the perceived weakness of small-scale operations into strengths. This approach ensures authentic regional experiences while distributing economic benefits throughout their small Alpine nation, not just traditional hotspots.



ETC Countries Unite for Regional and Temporal Distribution **Mr. Miguel Gallego**

Head of Marketing and Communication, European Travel Commission (ETC)

European Travel Commission (ETC) Head of Marketing and Communication explained that Europe, despite its small geographical area, welcomes 700 million travelers annually—half the world's tourists—with most visits concentrated in July and August, causing severe overtourism. To protect the environment, cultural heritage, and local residents, Europe seeks to distribute travelers across diverse regions and seasons while promoting sustainable, CO₂-reducing transportation.

The 36 ETC member countries unite strategically through their “Unlock an Unexpected Upgrade” campaign, which goes beyond promotion to educate demand and shape traveler perceptions toward sustainable tourism. This movement, led by ETC alongside the European Union and destination partners, encourages travelers to discover unexpected journeys while addressing overtourism through coordinated diversification.

Beyond marketing, ETC invests in future tourism professionals through children's books for ages 5-12, introducing tourism careers. Two titles per series are available in libraries and schools, with translations underway. They invite countries outside Europe to join this initiative, believing early exposure creates pride in tourism careers and addresses labor shortages.

The speaker emphasized that no one-size-fits-all solution exists, but ETC's foundation is cooperation—leaving differences aside to work together. This collaborative approach, from the Unlock campaign to educational initiatives, builds a sustainable, people-powered industry for tomorrow.

Panelists



“Thrive 2030” Charts Path to Sustainable Future
Senator the Hon Nita Green

Assistant Minister for Tourism, Australia

Today's tourism demands maintaining international competitiveness while delivering quality experiences and addressing economic, social, and environmental challenges. Australia's Thrive 2030 policy targets these goals, aiming to increase visitor spending by AUD 230 billion over 2020-2030, with 40% benefiting regional areas where 51% of tourism employment exists.

Digital innovation is redefining this future. Australia's “Come and Say G'day” campaign emphasizes irreplaceable personal experiences, viewing digital transformation as a tool to improve industry capability and create competitive, resilient businesses. The government invests in innovative measures including online training for operators, data analytics, and social media readiness.

The Longitude Indicators of the Visitor Economy (LIVE) framework provides a complete picture of sustainable development by measuring social, environmental, and institutional factors alongside economic considerations. This comprehensive approach reveals visitor interests beyond traditional metrics, enabling better experiences.

The pandemic accelerated online booking adoption, shifting from travel agents to digital platforms. Australia supports this transition through user-friendly interfaces, mobile optimization, and AI-powered personalization for bespoke itineraries. Combined with the National Sustainability Framework, this digital transformation ensures tourism growth benefits all communities while protecting Australia's unique assets, creating an industry that thrives economically while preserving what makes Australia special through strategic technology adoption.



Three Ds for Tourism-Driven Regional Transformation
Mr. Gustavo Timo

President, Adventure Travel Trade Association (ATTA)

Tourism should embrace “3 Ds”—Diversification, Dispersion, and Deepening—to drive climate action, cultural respect, and inclusive economic growth. Systems must particularly benefit local women, youth, and entrepreneurs directly. ATTA's latest research shows strong market demand for nature, culture, and experiential offerings.

However, implementing these principles presents challenges. The industry's biggest challenge is bringing global best practices while respecting authenticity and cultural specificities of each region. How can destinations train workforces in international standards without compromising local cultures? One promising solution involves sharing successfully trained professionals between regions to educate their peers, creating knowledge transfer that respects local contexts.

Regional transformation occurs when tourism growth harmonizes with community health, resilience, and long-term sustainability. This approach ensures tourism becomes a catalyst for positive change, creating opportunities for marginalized groups while preserving cultural heritage and natural resources. By implementing the 3 Ds through culturally sensitive training and peer-to-peer learning, destinations can achieve balanced development that strengthens local economies without compromising authenticity or environmental integrity. This balance between global expertise and local wisdom represents the path forward for sustainable tourism that truly benefits all stakeholders while maintaining each destination's unique character.

Panelists



Diversity: Central America's Strongest Asset. A 10-Year Vision for Regional Tourism Policy H.E. Ms. Gloria María De León Zubieta

Administrator General of Tourism Authority, Republic of Panama

Central America's greatest competitive advantage lies in its diversity—each nation possesses distinct cultures, natural environments, and traditions. Authenticity forms their competitive foundation, but destination diversification must also diversify benefits, ensuring local communities, women, youth, and MSMEs become tourism protagonists receiving fair, stable incomes.

As holder of the Central American Tourism Council presidency, Panama advances the Regional Tourism Policy (PRETUR 2025-2035) as a framework transforming diversity into strength. This creates an integrated, resilient, sustainable region where countries preserve identity while collectively building competitive regional offerings. The policy's first axis coordinates public, private, and international cooperation to ensure every destination has professionals capable of leading high-quality tourism.

The region's greatest asset remains human capital. Tourism depends on people, making investment in education and training essential for strengthening the sector while opening opportunities for employment, innovation, and social mobility. Through the Central American Tourism Council, Panama emphasizes that investing in people is investing in the future.

Over the next decade, Panama envisions diversifying sustainable, accessible tourism products based on regional potential and priority niches like social and accessible tourism. This commitment positions tourism as a driver for sustainable development, peace promotion, and community well-being throughout the SICA region.



Bringing DX Benefits to Tourism: Developing New Destinations H.E. Ms. Ana Claudia Caram

Vice Minister of Tourism, Oriental Republic of Uruguay

With cooperation from the Inter-American Development Bank (IDB), Uruguay is implementing its Innovation and Development of Tourism 4.0 strategy to expand digital transformation into the tourism industry. This initiative aims to build an ecosystem connecting digital solutions to effective tourism management through five key pillars: technological adoption in businesses and destinations, tourism data and intelligence, visitor digital experience, and sustainable and responsible innovation.

The strategy focuses on creating opportunities for areas previously overlooked in digital tourism infrastructure, allowing them to participate in the modern tourism economy while preserving authenticity through strategic digitalization. A pilot experience is being developed in La Valleja, an emerging year-round destination focused on rural and hill country tourism, currently in the final stages of UNESCO Global Geo Park designation.

This pilot will analyze the feasibility of geographically limited digital, technological, and innovation solutions that could later be scaled to other destinations nationwide. By testing comprehensive digital solutions in La Valleja, Uruguay aims to demonstrate how strategic digitalization can enable new destinations to benefit from modern tourism technology while maintaining their unique character. This approach ensures sustainable tourism development that respects local authenticity while embracing technological advancement for improved visitor experiences and destination management.

Panelists



From Overtourism to Balance: Japan’s Regional and Responsible Tourism Solution
Mr. Akira Yoshii

Parliamentary Vice-Minister of Land, Infrastructure, Transport and Tourism, Japan

While foreign visitor arrivals to Japan remain strong, some regions face excessive congestion and behavioral problems. To address these challenges, Japan heavily promotes Digital Transformation (DX) in tourism for regional revitalization and sustainable development, focusing on three objectives: improving tourist convenience, enhancing tourism management quality, and increasing industry productivity.

Japan advances comprehensive digital solutions through destination management organizations (DMOs). Kyoto exemplifies this with tourist express buses, real-time digital congestion maps, and digital signage—successfully managing potential overtourism. In Hakone, real-time traffic monitoring provides alternative routes to standardize traffic flow. Sakata City in Yamagata Prefecture demonstrates centralized data management through a digital platform integrating accommodation occupancy, tourist spending, overnight stays, and satisfaction levels.

This data-driven approach enables efficient destination management by optimizing accommodation pricing and staffing levels based on demand patterns. Region-to-region data allocation maximizes profits while ensuring sustainability. Japan emphasizes balancing tourism acceptance with residents' quality of life through transportation systems, demand distribution, and leveling measures.

By combining digital infrastructure, data analytics, and community engagement while collaborating internationally to share best practices, Japan creates a responsible tourism management model. This comprehensive approach ensures harmony between visitor experiences and local well-being, providing a reference framework for destinations facing similar challenges.

Closing Remarks



Diversity Essential for Competitiveness and Demand Distribution
Mr. Tadashi Kaneko

Director, Regional Support Office for Asia and the Pacific, UN Tourism

On behalf of UN Tourism as collaborating organization for this roundtable, we extend our heartfelt gratitude to ministers, delegates, and all participants for their active contributions. We discussed regional tourism promotion focusing on “transformation” as our keyword in two key areas.

First, maintaining local identity and competitiveness while offering diverse tourism resources is essential for sustainable, attractive destinations. Diversifying destinations is crucial for resolving demand concentration by region and season—leveling out demand across seasons and locations remains a key objective that destination diversification should achieve.

Second, overcoming well-trained, educated labor shortages is necessary for sustainable, high-quality tourism for the future. Human resource development and digital technology introduction are complementary measures for this challenge. Their synergistic effects improve tourism service quality while addressing workforce needs.

Today’s discussions emphasized that diverse tourism offerings enhance destination appeal and help distribute tourist flows evenly, creating more resilient and competitive tourism ecosystems across regions. Through combined efforts in destination diversification, workforce development, and technology adoption, the tourism sector can achieve sustainable growth benefiting all stakeholders. We look forward to reconvening next year in Tokyo to continue advancing these critical initiatives.

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