

Gifu Prefecture Sustainable Tourism Observatory

Preliminary Study

Area: Gifu Prefecture, Japan

Applicant: Gifu Prefecture

september 2023



清流の国ぎふ

The objective of the UNWTO Network of Observatories (INSTO) is to create evidence through regular monitoring, requiring continuous efforts and commitment to understand the impacts of tourism on destinations and to ensure sustainable development. While it is intended that the monitoring and reporting is carried out in full compliance with existing UNWTO recommendations, standards and definitions, the views expressed in this report are those of the authors and may not necessarily reflect the views of UNWTO.

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1. Introduction

Japan is an East Asian island nation consisting of four large islands and other smaller islands. The country is elongated from north to south, and 67% of its land is forested, making it attractive for visitors to experience the richness of nature, which changes with the seasons, and the diversity of cultures in different regions.

The Japanese government began to seriously address tourism as a major policy issue in 2003, and in 2008 the Tourism Agency was newly established. In Japan, where the population is rapidly declining and aging, attracting inbound travelers is particularly important. As a result of strong promotional efforts, the number of foreign visitors to Japan has shown remarkable growth: from just over 5 million per year in 2003 to 10 million in 2013, 20 million in 2016, and over 30 million in 2018 (*1).

Gifu Prefecture, located almost halfway between Japan's major cities of Tokyo and Osaka, enacted an ordinance in 2007 (*2) to develop tourism as a key industry in the prefecture, and through the steady promotional activities, the number of visitors reached 48.00 million per year, tourism consumption amounted to 293.3 billion yen and the induced production by tourism consumption was 410.3 billion yen in 2019, before the spread of COVID 19 (*3). The total number of 7.3 million overnight visitors accounts for 1.2% of the total number of visitors in Japan (595.92 million) (*4). In addition, the number of foreign visitors to Gifu Prefecture has increased rapidly in recent years, rising from 0.42 million in 2013 (1.2% of Japan's total) to 1.66 million in 2019 (1.4% of the total) (*4).

However, the outbreak of COVID 19 caused an unprecedented drop in tourism demand, and the tourism industry in the prefecture was severely affected. In Gifu Prefecture, in line with the Japanese government's "Fourth Basic Plan for the Promotion of Tourism Nation" (*5), which calls for the implementation of the three strategies of "develop sustainable tourism destination," "inbound recovery," and "expansion of domestic exchange," we will prioritize efforts to achieve an early recovery of the tourism industry, and from a mid - to long-term perspective, we will deepen and develop efforts to develop sustainable tourism destination that will be chosen by the travelers around the world.



1 Japan National Tourism Organization, "Number of Foreign Visitors to Japan" /2 "Let's Create a Tourism Kingdom in Hida and Mino Ordinance" /3 Gifu Prefecture, "Tourism Visitors Statistical Survey "(2019) / 4 Tourism Agency, "Overnight Travel Statistical Survey / 5 three-year plan for FY2025 to 2027 formulated in March 2023

Gifu Prefecture's objectives in joining the UNWTO's International Network for Sustainable Tourism Organizations (INSTO) are summarized in the following three points.

(1) Establishment of a system to promote sustainable tourism

For the purpose of establishing a system to promote sustainable tourism organically and systematically by applying the INSTO framework, we will establish an efficient and effective operational system by adding necessary functions to existing organizations and connecting existing organizations to each other.

(2) Identification and improvement of the current situation based on indicators

The Gifu Prefecture Department of Tourism and International Affairs and the Gifu Prefecture Tourism Federation (DMO) have been using indicators and data to understand the current status of the tourism industry and reflect them in policies, but the focus has been on measuring the economic effects of tourism, such as the number of visitors and the amount of tourism consumption. The introduction of the eleven INSTO-designated issue areas and two of our own will enable more comprehensive and multifaceted monitoring of the impact of tourism on the environmental, social and cultural aspects, and will lead to improvements.

(3) Information collection and discussion through the INSTO network

By collecting information and exchanging opinions on the experiences of INSTO members that are making advanced-level activities, we will accelerate its sustainable tourism efforts. In addition, by sharing Gifu Prefecture's activities and findings, we will contribute to the further development of the INSTO network.



2. Background

Gifu Prefecture is located in the center of Japan and is blessed with abundant nature. Clear streams originating from forests flow throughout the prefecture, enriching villages and towns, and nurturing traditions, culture, and industry. With this regional background, we have been making efforts to protect these treasures while making use of them.

2.1. Gifu Prefecture Overview

	Gifu Prefecture (parentheses : percentage of Japan's total)	Japan Total
Land Area ※1	10,621 km ² (2.8%)	377,973 km ²
Population ※2	1.98 million (1.6%)	126.15 million
Classification	42 municipalities	47 prefectures
Number of accommodations and rooms ※3	Accommodations : 1,075 (2.1%) Rooms : 25,738 (1.5%)	Accommodations : 50,523 Rooms : 1,757,557
Annual tourist arrivals (actual number of domestic and inbound) ※4	47.995 million	(No data measured available on the same basis)
Annual overnight guests (total number) ※5	Domestic : 5.644 million (1.2%) Inbound : 1.66 million (1.4%)	Domestic : 480.265 million Inbound : 115.656 million
Peak month (percentage of annual total) ※5	Domestic : August 12.0% Inbound : April 11.2%	Domestic : August 11.2% Inbound : April 9.8%
Peak quarter (percentage of annual total) ※5	Domestic : Third quarter (July-September) 29.1% Inbound : Second quarter (April-June) 27.6%	Domestic : Third quarter (July-September) 28.2% Inbound : Second quarter (April-June) 26.5%



*1 National census (as of October 2020) *2 Ministry of Internal Affairs and Communications, "Population Statistics" (2022) *3 Ministry of Health, Labour and Welfare, "Example of Health Administration Report" (as of March 31, 2021) *4 Gifu Prefecture, "Tourism Visitors Statistical Survey" (2019) *5 Tourism Agency, "Lodging Travel Statistical Survey" (2019)

Gifu Prefecture Overview

Major tourist attractions and annual visitors (domestic and inbound) (2019)



Shirakawa-go Gassho-Zukuri Village (Shirakawa Village) 2.03 million



Gujo Hachiman (Gujo City) 350,000



Old streets of Mino (Mino City) 160,000



Historic Sekigahara Battlefield (Sekigahara Town) 160,000



Nagara River *Ukai* Cormorant Fishing (Gifu City) 90,000



Ena Valley (Ena City) 460,000



Magomejuku of Nakasendo (Nakatsugawa City) 660,000



Gero Hot Spring (Gero City) 1.23 million



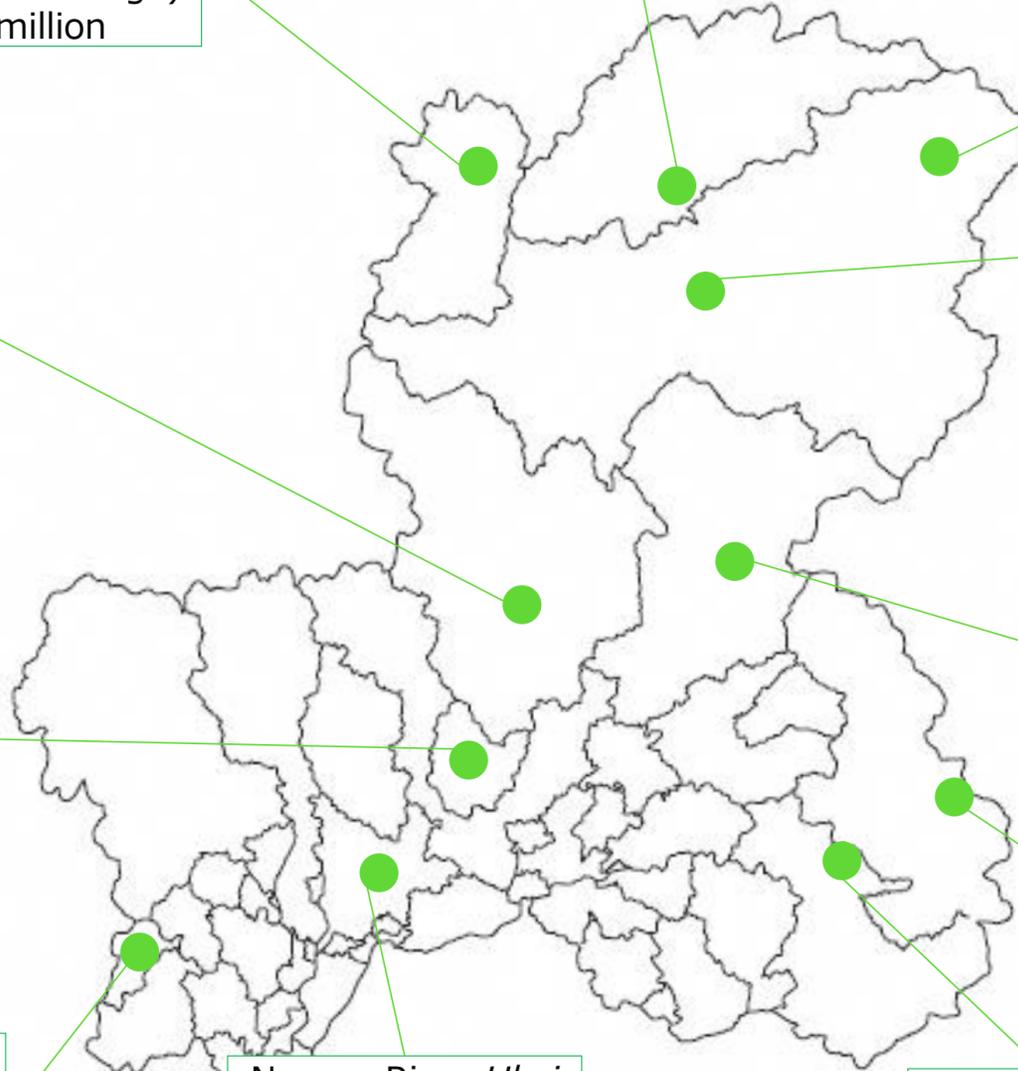
The old quarter of Hida Takayama (Takayama City) 3.83 million



Okuhida Hot Spring Villages (Takayama City) 620,000



Old streets of Hida Furukawa (Hida City) 290,000



Gifu Prefecture has focused on "clear waters," the foundation of life, culture, industry, and the source of all life and abundance, as an important resource and identity of the prefecture, and has adopted the slogan "Gifu, the Land of Clear Waters" and established the "The Charter of Gifu, the Land of Clear Waters" as the basic philosophy for its efforts since 2014. Based on this charter, various measures have been developed for the next 100 to 200 years. Sustainable tourism initiatives in Gifu Prefecture have been developed from this long-term perspective.

The Charter of Gifu, the Land of Clear Waters

Gifu Prefecture, Our Land of Clear Waters, boasting the world class beauty of bountiful forests and pristine streams.

Gifu Prefecture has long been blessed with a rich natural environment, filled with majestic purple hills and clear waters fostering its unique tradition in arts and culture, which Gifu proudly presents to the whole world. The crystal clear water flows through bountiful forests and rivers throughout the prefecture to sustain life and communities, especially strong in the hearts of our local people as "Clear Waters of the Heart", providing us with a sense of comfort and richness in our minds.

Our pristine waters have been the source of the special traditional culture of cormorant fishing "Ukai" with a history of over 1,000 years, as well as manifesting themselves in our local craftsmanship of Hida woodworks, Mino Washi Japanese paper, Seki knives and cutlery, and Tono (East Mino Region) ceramics. All the precious gifts from our clear waters are becoming the seeds to create our new future.

We, the people of Gifu Prefecture, appreciate the clear waters for their blessings. We recognize the local treasures of the rich natural environment, history, tradition, culture and art of craftsmanship born of the clear waters and will pass them on to future generations.

Therefore, we hereby establish the Charter of Gifu, the Land of Clear Waters with the aim to empower Gifu Prefecture to build its future over the next 100 to 200 years and cultivate ties among people, connecting nature with people across generations.

We who live in Gifu, the Land of Clear Waters, pledge to accomplish the following:

- Awareness: We will study and learn about the rich natural environment, history, tradition, culture and art of craftsmanship with which the clear waters have provided us.
- Creation: We will strive to improve and utilize our local treasures in new creations with more appeal.
- Heritage: We will endeavor to pass on the blessings of pristine waters to future generations.

January 31, 2014

Prefectural Committee for the Promotion of Gifu, the Land of Clear Waters

Gifu Prefecture Basic Strategies Positioning of Sustainable Tourism in Comprehensive Policies

Gifu Prefecture's comprehensive policy "Comprehensive Strategy for the Creation of 'Gifu, the Land of Clear Waters'", Action plans embodying initiatives to actualize the SDGs "Gifu Prefecture SDGs Future City Plan" and a policy regarding overall economy and employment including tourism "Gifu Prefecture Economy and Employment Revitalization Strategy," were revised in 2023, and all position sustainable tourism related initiatives as one of the key policies.

Comprehensive Strategy for the Creation of "Gifu, the Land of Clear Waters" (2023-2027)

Theme

Moving toward a Hometown with Happiness and Assured Livelihood in Gifu Prefecture

Policy

1. Human Resource Development that supports "Gifu, the Land of Clear Waters"
2. Creating a Healthy and Peaceful Community
3. Creating Appeal and Vitality within the Community

<Excerpt of the tourism section>

3. Creating Appeal and Vitality within the Community
 - (2) Promotion of industries for the next generation
 - ④ Development of sustainable tourism destination chosen by travelers around the world
 - Promote the development of sustainable tourism destination by supporting the efforts of local communities, including tourism destination development corporations (DMOs), to preserve the prefecture's attractive regional resources such as nature, history, and culture, and to utilize regional resources for tourism in order to increase tourism consumption.
 - Utilize digital technology, etc., to improve productivity in the tourism industry and promote the development and securing of tourism human resources.
 - The project will establish a wide-area tour route that will lead to increased tourism consumption by connecting attractive regional resources unique to the prefecture, establish tourism marketing, and develop detailed and continuous promotions to attract visitors from Japan and overseas, while also utilizing digital technology, etc.

Gifu Prefecture SDGs Future City Plan (2023-2025)

Vision for 2030

World-class "Gifu, Land of Clear Waters" created by its nature and people

Initiatives to contribute to the SDGs

1. Environment: Preservation and utilization of beautiful clear streams and the rich forests that nurture them
 - Promoting Environmental Preservation
 - Accelerate efforts to actualize a "Decarbonized Society in Gifu"
 - Promote the introduction of next-generation energy
 - Promotion of measures to protect people's lives from disasters
2. Economy: Establish "Gifu, the Land of Clear Waters" brand and a local economy that is resilient to change.
 - Establish a sustainable "Gifu, the land of Clear Waters" brand
 - Development of sustainable tourism destination chosen by travelers around the world
 - Achieving business transformation through digital technology
 - Strengthen the vitality of the prefecture's industries and promote new business development
 - Formation of a wide-area network to support the local economy
3. Society: Build a local community where everyone can play an active role and feel a sense of life fulfillment.
 - Actualization of a co-creation society where everyone can play an active role together
 - Creating an environment to promote relocation, settlement, and attracting businesses
 - Preserve, utilize, and pass on the richness of the river systems including the Nagara River System.
 - Promotion of Gifu Mokuiku (wood education), utilizing abundant forest resources
 - Fostering pride and attachment to hometown Gifu
 - Improvement of local medical and welfare infrastructure and childcare environment
 - Develop a society that does not have the digital divide (information gap)

Gifu Prefectural Growth and Employment Revitalization Strategy (2023-2027)

Policy

1. Projects to revitalize the prefectural economy through business succession, new business development, etc.
2. Industrial revitalization project through digital transformation
3. Project to promote actualization of "Decarbonized Society "
4. Creating an environment to promote relocation, settlement, and attracting businesses
5. Global expansion of prefectural products
6. Project to develop sustainable tourism destination chosen by travelers around the world
7. Project for securing human resources and employment

<Excerpt of the tourism section>

6. Project to develop sustainable tourism destination chosen by travelers around the world

Current Situation and Issues of Tourism in Gifu Prefecture

- The COVID-19 pandemic caused an unprecedented drop in tourism demand, and the tourism industry in the prefecture was severely affected.
- Sustainable tourism is a global trend in tourism, and efforts must be made in cooperation with local communities to promote sustainable tourism, enhance experience programs, and uncover new attractions.
- The shortage of human resources and successors in the tourism industry is becoming more serious, and there is a need to improve the working environment and profit structure.
- Establishment of tourism marketing and construction of tour routes that connect tourism resources with stories are effective in attracting visitors and increasing tourism consumption.

Future Direction of Tourism Policy

(1) Promote sustainable tourism

- Aiming to become a destination of choice for travelers around the world, we will promote sustainable tourism, as well as tourism to the warring states and military commanders unique to our prefecture, with the Sekigahara ancient battlefield at the core of our efforts.

(2) Securing and developing tourism human resources and improving productivity

- Promote the securing and development of tourism human resources through cooperation with related businesses.
- Support for advanced-level initiatives to improve the productivity of tourism businesses, such as the use of digital technology

(3) Developing promotional activities to attract visitors to increase tourism consumption

- Develop effective promotional activities using digital marketing methods to attract visitors while taking advantage of the prefecture's unique tourism resources

3. Gifu Prefecture Sustainable Tourism Promotion Scheme

Based on Gifu Prefecture's basic strategies and efforts for sustainable tourism to date, we have developed a vision and measures to further evolve sustainable tourism in Gifu Prefecture.

In joining as a member of INSTO, Gifu Prefecture Department of Tourism and International Affairs will take the lead in promoting specific initiatives in cooperation with various stakeholders, while efficiently and effectively utilizing existing organizations.

Vision for Sustainable Tourism Promotion

In order to preserve attractive regional resources such as nature, history, and traditional culture, which are the strengths of the prefecture, and utilize them for tourism, we will promote monitoring using indicators and initiatives to improve sustainability in cooperation with various stakeholders. By so doing, we will aim to become a destination chosen by the world as a sustainable tourism destination that is “a great place to live and a great place to visit.”

1. Establishment of collaboration system involving all sectors of the prefecture

[Issue] It is necessary to create a prefecture-wide system involving not only tourism-related businesses but also non-tourism sectors.



The observatory will work with various stakeholders including tourism-related industries, non-tourism sectors such as industry, environment, culture, agriculture, forestry, and fisheries, and research institutions to build consensus and cooperation.

2. Promotion of community-based initiatives

[Issue] Since there is a difference in the degree of effort among the regions in the prefecture, it is necessary to foster awareness and promote understanding of the need to develop sustainable tourism.



The observatory will support the regions in the prefecture to promote the development of a sustainable tourism in cooperation with public, private sector and local residents using indicators such as the "Japan Sustainable Tourism Standard for Destinations (JSTS-D)" and develop such initiatives throughout the prefecture.

3. Operation of PDCA cycle

[Issue] It is necessary to set indicators across sectors, share monitoring results, and develop measures that reflect these results.



The observatory will monitor regularly based on the monitoring indicators to understand, evaluate, and analyze the current situation from multiple perspectives, leading to improve sustainability issues.

4. Development of promotional activities

[Issue] Amidst a recovery in tourism demand both domestically and internationally, an approach that differentiates the region from other regions is necessary in order to make Gifu Prefecture the destination of choice for travelers around the world.

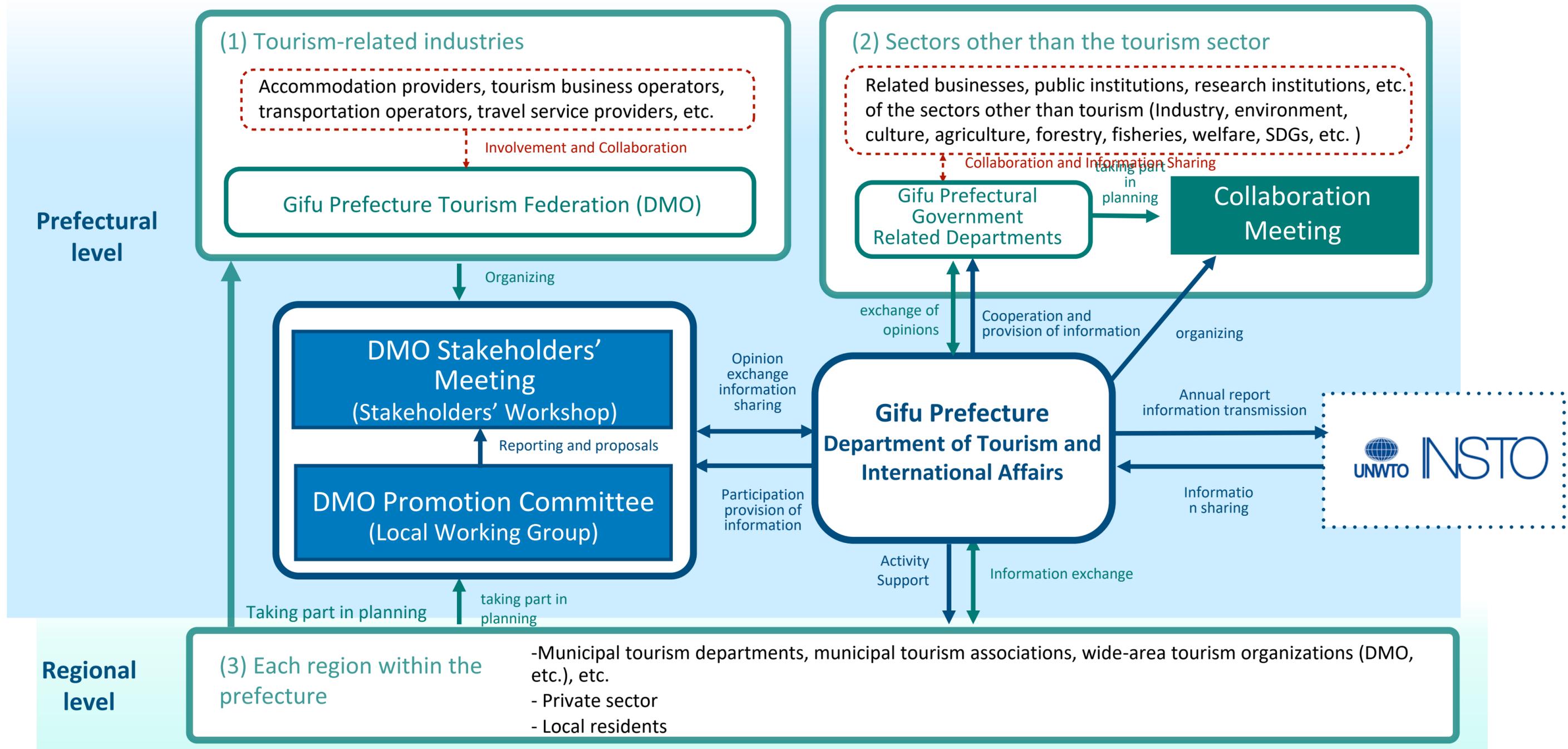


The observatory will develop promotional activities to attract visitors by disseminating both domestically and internationally Gifu's regional appeal which obtained international recognition of sustainable tourism, such as selection as one of the Green Destinations "World's Sustainable Tourism Destination Top 100 Stories."

Measure 1: Establishment of Collaboration System Involving All Sectors of the Prefecture

The observatory will work with various stakeholders including tourism-related industries, non-tourism sectors such as industry, environment, culture, agriculture, forestry, and fisheries, and research institutions to build consensus and cooperation.

Observatory management system



Measure 1: Establishment of Collaboration System Involving All Sectors of the Prefecture

Members of each organization and their main roles

Organization	Members	Main Roles
Gifu Prefecture Department of Tourism and International Affairs	<ul style="list-style-type: none"> - Executive director of the Department of Tourism and International Affairs, Gifu Prefecture (Person responsible) - Sustainable Tourism Promotion Section, Department of Tourism and International Policy Division, Gifu Prefecture(Contact person) 	<ul style="list-style-type: none"> - Contact point, operation and management of INSTO observatory - Liaison and coordination with related organizations
DMO Promotion Committee	<ul style="list-style-type: none"> - Directors and responsible staff for marketing at the Gifu Prefecture Tourism Federation (DMO) - Directors and section managers in tourism related divisions of Department of Tourism and International Affairs, Gifu Prefecture etc. About 20 people 	<ul style="list-style-type: none"> - Sharing of various data, regular monitoring, sharing of issues, exchange of opinions on future development, strategic planning, etc. - Positioned as a local working group, to be held about once a month (*)
DMO Stakeholders Meeting	<ul style="list-style-type: none"> - Representatives of tourism-related industries (accommodation providers, tourism business operators, transportation operators, travel service providers, etc) - Representatives of municipal tourism departments and municipal tourism associations - Executives of the Department of Tourism and International Affairs, Gifu Prefecture - Executives of the Gifu Prefecture Tourism Federation etc. About 40 people 	<ul style="list-style-type: none"> - Sharing of monitoring results, exchange of opinions on future development, etc. - Positioned as a stakeholder workshop, to be held 1-3 times a year (*) <p>A meeting held on September 20, 2022</p> 
Collaboration Meeting (within Gifu Prefectural government)	<ul style="list-style-type: none"> - Industry: Commerce, Industry and Energy Policy Division, Labor and Employment Division, etc. - Environment: Environment and Citizen Policy Division, Environmental Management Division, Decarbonized Society Promotion Division, etc. - Culture: Cultural Creative Division, Cultural Heritage Division, etc. - Agriculture, Forestry and Fisheries: Satokawa Promotion Division, Forest Utilization Promotion Division, etc. - Welfare: Senior Citizens' Welfare Division, Disability Welfare Division, etc. - SDGs: SDGs Promotion Division 	<ul style="list-style-type: none"> - Data collection, monitoring and sharing of results, review of indicators, etc. - Held 1 to 3 times a year, as needed. <p>A meeting held on November 28, 2022</p> 

Measure 2: Promotion of Community-based Initiatives

The observatory will support the regions in the prefecture to promote the development of a sustainable tourism in cooperation with public, private sector and local residents using indicators such as the "Japan Sustainable Tourism Standard for Destinations (JSTS-D) *1" and develop such initiatives throughout the prefecture.

- In order to make tourism in Gifu Prefecture as a whole sustainable, each region's DMO, etc., which encompasses government, private businesses, and local residents, must take the lead in addressing the issues faced by each region by utilizing objective data and indicators.
- For example, five regions in the prefecture (Shirakawa Village, Nagara River Basin, Gero City, Nakatsugawa City, and Takayama City) have worked to create sustainable tourism regions based on JSTS-D, utilizing subsidized projects by the Japan Tourism Agency and Gifu Prefectural government, three of which were selected by Green Destinations "Top100 World's Sustainable Tourism Destination Stories."
- The Gifu Prefecture's Tourism and International Affairs Department will support regions that are working to create sustainable tourism regions by utilizing data and indicators, as well as spreading such efforts throughout the prefecture. As part of these efforts, a system was established in 2022 to certify tourism programs that drive the creation of sustainable tourism regions in Gifu Prefecture as "NEXT GIFU HERITAGE " based on certification standards that incorporate international indicators of sustainable tourism.

About "NEXT GIFU HERITAGE "

In 2007, Gifu Prefecture launched the "Gifu's Treasures" certification project to uncover local natural, historical, cultural, and other resources that are the pride of the region and polish them into nationally recognized tourism resources. A total of six resources have been certified as "Gifu's Treasures," and efforts have been made to brush up the resources and promote their appeal.

In 2022, the system was renewed by introducing an international criteria of sustainable tourism into the certification criteria and certifying initiatives that serve as models for the creation of sustainable tourism areas in Gifu Prefecture as "NEXT GIFU HERITAGE ". The "NEXT GIFU HERITAGE" will be widely publicized both domestically and internationally as a leading example of sustainable tourism in Gifu Prefecture, and will be used to attract more visitors. The program will also support efforts to improve the host environment and promote the attractiveness of the area based on the advice of experts.

*1 JSTS-D is a criteria developed by the Japan Tourism Agency and the UNWTO Office in Japan in 2020 to help local governments, DMOs and other organisations manage destinations sustainably based on the results of a multifaceted understanding of the current situation. The indicators reflects the characteristics of Japan in each item and complies with the international standard GSTC-D.

Measure 2: Promotion of Community-based Initiatives

Examples of regional issues and initiatives

Case 1: Shirakawa Village



[Issues] The number of tourists from Japan and abroad surged after the UNESCO World Heritage Site was registered in 1995. While overtourism had a negative impact on residents, zero-dollar tourism also became a problem.

[Initiatives] The village has taken its own measures to balance tourism with the daily lives of its residents, such as regulating the use of private cars in the village, requiring complete reservations for winter light-up events, and prohibiting smoking throughout the village and installing dedicated booths for heated tobacco products to protect the fire-sensitive Gassho-Zukuri Village. In order to increase revenue from tourism, an eco-tourism promotion council has been established to develop experience-based programs and train guides.

Case 2: Nagara River Basin (Gifu City, Seki City, Mino City, Gujo City)



[Issues] The number of people who preserve and impart the traditional industries and fishing techniques that have been handed down in the Nagara River basin has been decreasing due to the aging of the population. In addition, the recent torrential rains have caused damage to cormorant fishing boats, resulting in long suspensions of operations and a resulting decrease in the number of passengers and guests.

[Initiatives] Efforts are being made to nurture successors by accepting trainees to learn traditional techniques, training "hometown education" instructors, and communicating the attractiveness of the area through hands-on programs.



Nagara River Basin stakeholders gathered for a sustainable tourism workshop in September 13, 2022

In addition, efforts are being made to utilize the river for tourism while maintaining coexistence between the residents and the river through such measures as the maintenance of levees by the flood prevention team, disaster prevention education based on lessons learned from past disasters, and providing a new method of viewing cormorants from the riverbank.

3.3. Measure 2: Promotion of Community-based Initiatives Issues and Examples of Efforts in Each Region

Case 3: Gero City, Gero Hot Spring



[Issues] The number of tourist groups, who used to be the main customer base, has been decreasing year by year due to changes in travel styles, making it a challenge to attract individual tourists and repeat customers. Furthermore, due to the outbreak of COVID-19, the number of inbound travelers has also plummeted.

[Initiatives] Gero Onsen Tourism Association introduced an application that provides information and points for Gero Hot Spring, and acquire repeat customers by sending out information tailored to users' preferences and needs. By developing a variety of eco-tours and experience programs, as well as focused promotions targeting individual visitors, the number of visitors has recovered to 90% of the pre-COVID 19 (2019) level as of October 2022.



Eco-tour in Osaka waterfalls

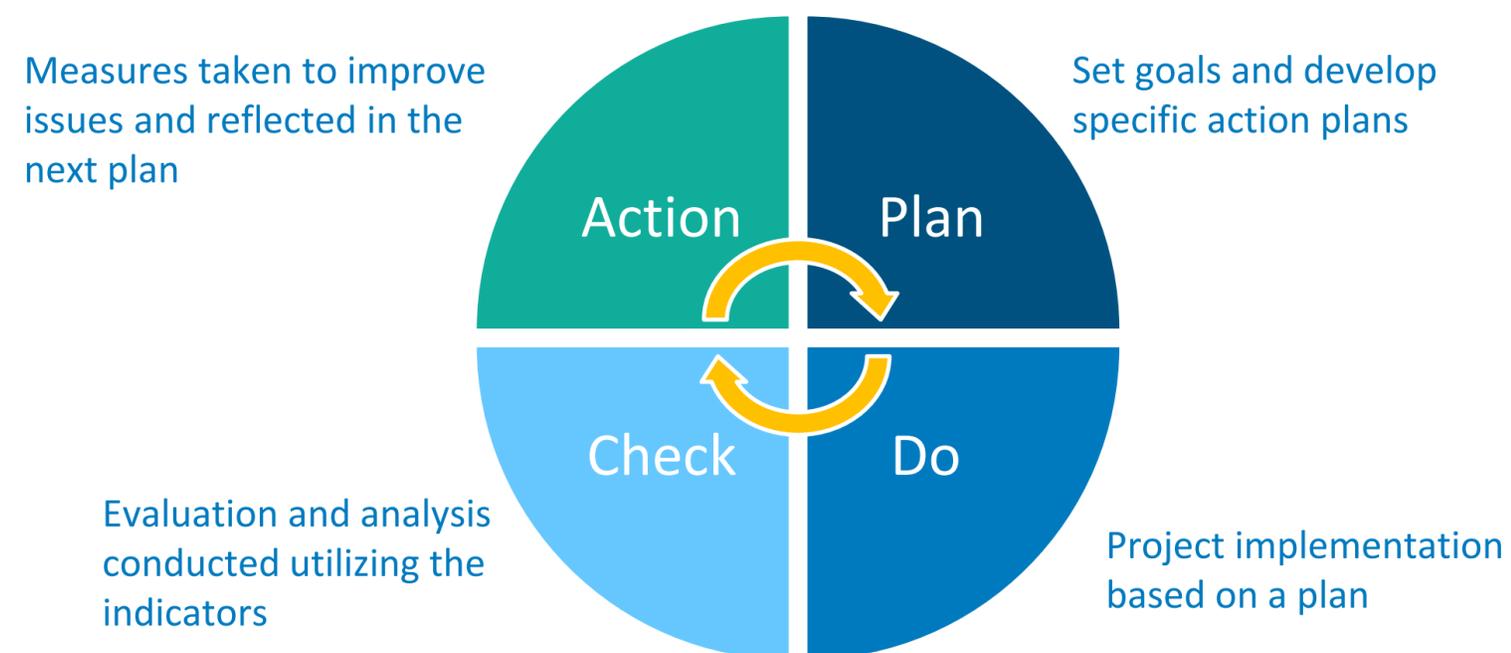


Gero Hot Spring stakeholders gathered for a sustainable tourism workshop in June 13, 2022.

3.4. Measure 3: Operation of PDCA Cycle

The observatory will monitor regularly based on the monitoring indicators to understand, evaluate, and analyze the current situation from multiple perspectives, leading to improve sustainability issues.

- Taking the opportunity of joining INSTO, Gifu Prefecture will set its own issue areas in addition to those indicated by INSTO, to further enhance the tourism data that has been collected and analyzed so far, as well as collect data on other areas (social, cultural and environmental) to understand and evaluate the current situation from various perspectives, which will lead to improvement of the issues.
- Key sustainability issues and monitoring indicators have been identified based on the discussion at the “DMO Promotion Committee” (local working group), and the “ Collaboration Meeting (within Gifu Prefectural government) ”. They were also consulted to reach a consensus at the “ DMO Stakeholders’ Meeting “(stakeholders’ workshop).
- Gifu Prefecture DMO has been continuously collecting and analyzing various data related to tourism, reflecting the analysis results in tourism policies and plans, and compiling them into the “Tourism Report” to share information with those involved in tourism in the prefecture. Currently, the monitoring method has been reviewed, such as the system for lodging information statistics is being enhanced (details on page 20), and the renewal of the "Tourism Report" (details on page 21).



Measure 3: Operation of PDCA Cycle

Monitoring Improvement Example 1: System Enhancement of Accommodation Information Statistics

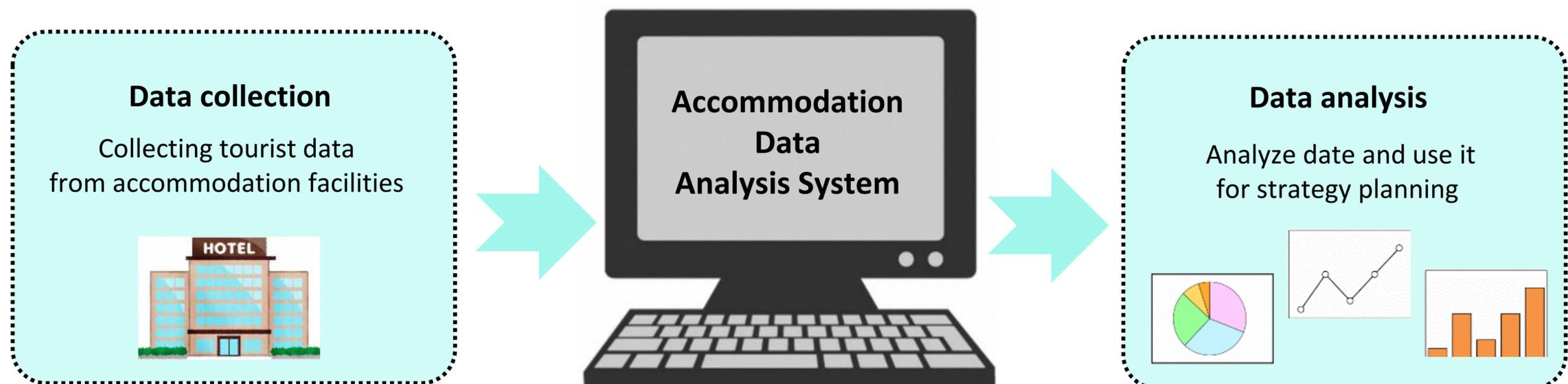
The Gifu Prefecture Tourism Federation (DMO) is working to build a system that will collect tourist data held by accommodation facilities and analyze the data from each facility and the region as a whole, with the goal of accurately identifying what types of guests are visiting the region.

[Issue]

- There is a lack of collection and analysis of independent data other than the Gifu Prefecture Tourism Information Web site.
- Many regional DMOs also face the challenge of collecting and analyzing their own data, and are unable to fully utilize it for their strategies.

[Initiatives]

- Requesting data held by lodging businesses to be provided in cooperation with regional DMOs and other organizations.
- The collected data will be analyzed using the accommodation data analysis system, allowing the DMO, etc. to clarify the attributes of tourists and differences from competing areas, and to utilize this information for their strategies. In addition, accommodation operators can not only easily analyze their own data, but also objectively understand their own strengths and weaknesses by comparing them with regional trends.
- Preparations are underway in each region for the introduction of the system by holding project briefings and follow-up with each lodging facility.



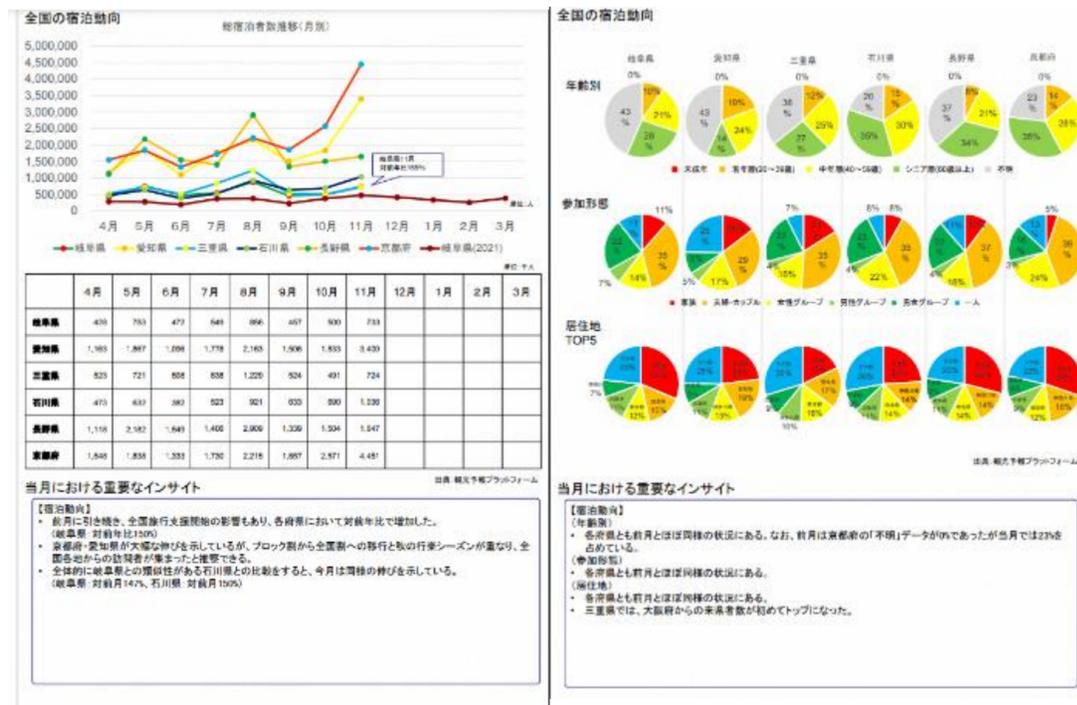
3.4. Measure 3: Operation of PDCA Cycle Monitoring Improvement Example 2: Renewal of "Gifu Prefecture's Tourism Report"

The Gifu Prefecture Tourism Federation (DMO) has been publishing the "Gifu Prefecture's Tourism Report" monthly and quarterly with the aim of sharing the current status and issues of tourism in Gifu Prefecture with tourism-related businesses in the prefecture. This report has included information on the number of visitors to major tourist facilities and access to tourist information websites, etc. However, since the data had not been analyzed and fully utilized in the implementation of measures, a review of the report was conducted.

[Initiatives]

- The data is reviewed and renewed to make it easier to use, and is made available to tourism businesses.
- The results of the analysis by the Accommodation Data Analysis System will be included in this "Tourism Report".

[Part of the renewed report (in Japanese only)]



↑ In terms of lodging trends, by comparing trends in other prefectures and regions within the prefecture, we can clarify our own strengths and weaknesses and use this information for future promotions and campaigns. The data from the "Tourism Forecasting Platform," which enables analysis of the attributes and trends of hotel guests and provides real-time data, are used.

↑ In addition to the number of visitors to the tourism information website, we measure behaviors that lead to visits, such as session time and direct return rate, etc. In SNS analysis, we measure the number of clicks and shares for posts and verify the effectiveness of information transmission.

3.5. Measure 4: Development of promotional Activities

The observatory will develop promotional activities to attract visitors both domestically and internationally utilizing international recognition of sustainable tourism, such as selection as one of the Green Destinations “Top 100 World’s Sustainable Tourism Destination Stories.”

- Gifu Prefecture’s appeal lies in its “rich natural environment, where traditions, culture, and craftsmanship passed down from predecessors live on in people’s daily lives,” and the prefecture has received international recognition as a region that is actively engaged in sustainable tourism, including three regions being selected as one of the Green Destinations “Top 100 World’s Sustainable Tourism Destination Stories.” In order to become a destination of choice for travelers around the world, Gifu Prefecture will reflect its sustainable attractions in all its marketing activities, and will attract visitors from Japan and abroad by creating and selling destination-type tour products that allow visitors to experience the unique attractions of Gifu Prefecture.
- Particular emphasis will be placed on promotion to inbound visitors, who are particularly interested in sustainability, leading to sustainable tourism destination management by equalizing seasonality and extending the length of stay.
- In order to develop effective and efficient promotions, we will also focus on digital marketing, guiding visitors to its website through SEO/MEO measures, online advertising distribution, SNS utilization, etc., as well as through website access data analysis and analysis for effective information dissemination. (Details on page23)



Renewal of foreign language website "VISIT GIFU" in 2020

<https://visitgifu.com>

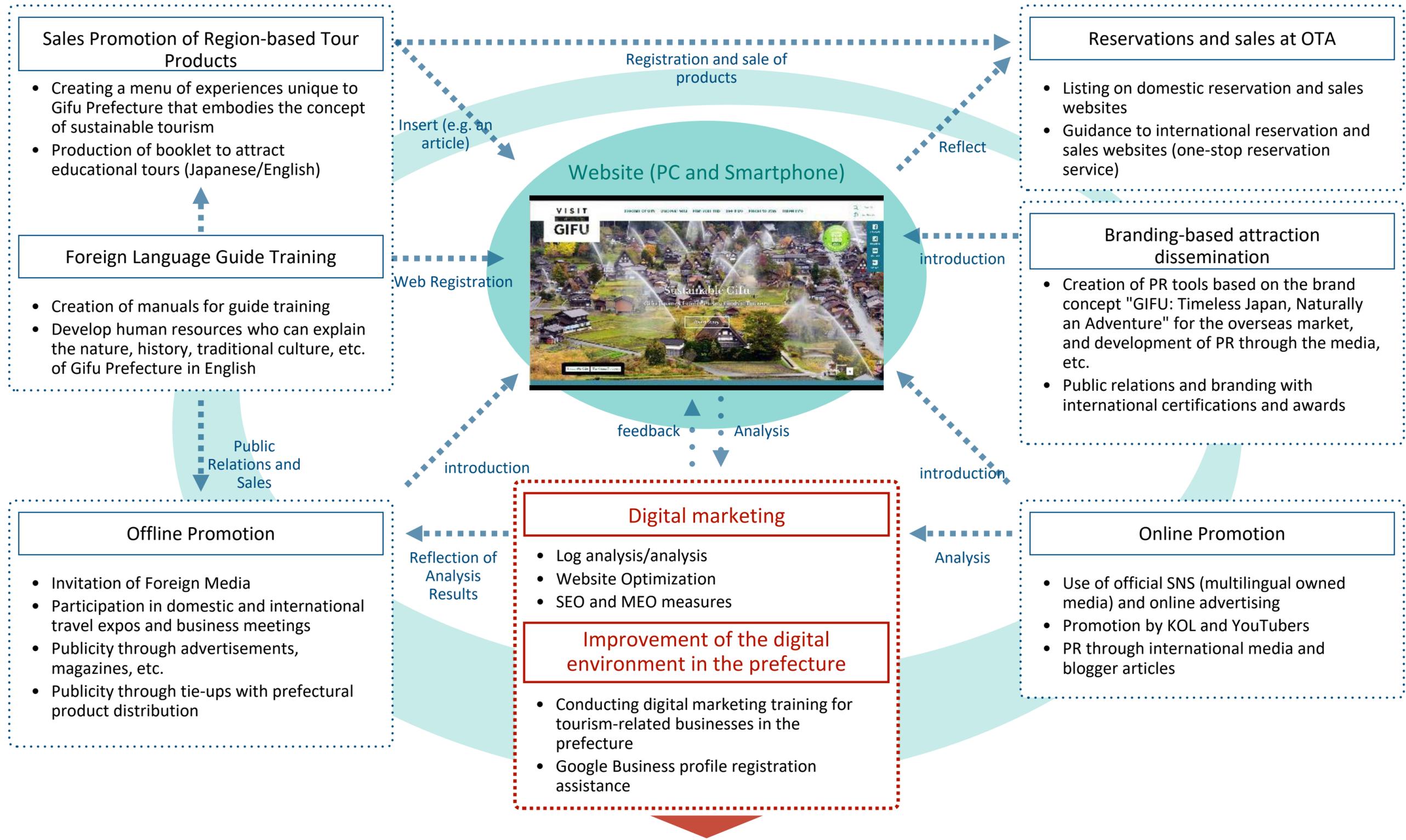


PR video produced based on the brand concept "Timeless Japan, Naturally an Adventure

<https://youtu.be/aSCwDb87gXI>

Measure 4: Development of Promotional Activities

Effective and efficient promotion through digital marketing



Build an effective and efficient flow line to attract visitors by linking information dissemination based on digital analysis with the website to develop each initiatives.

4. Key Sustainability Issues, Initiatives and Monitoring Indicators

4.1. Approach and Process for Establishing Issues and Indicators

- Key sustainability issues and monitoring indicators have been identified based on the discussion at the “DMO Promotion Committee” (local working group), and the “ Collaboration Meeting (within Gifu Prefectural government) ”. They were also consulted to reach a consensus at the “ DMO Stakeholders’ Meeting “(stakeholders’ workshop).
- In addition to the 11 issue areas designated by INSTO, “Cultural preservation ” and “Conservation of Natural Environment ” are added as Gifu Prefecture’s own issue areas. These were added in accordance with the "Comprehensive Strategy for the Creation of 'Gifu, the Land of Clear Water'", "Gifu Prefecture SDGs Future City Plan" and "Gifu Prefecture Economy and Employment Revitalization Strategy", in order to protect the unique charm of Gifu Prefecture and hand it down to the future.
- Indicators will be monitored and analyzed on a regular basis, and additions and revisions will be made as necessary. The results of the analysis will also be compiled in an annual report.

Key issue areas

ECONOMY

1. Destination’s economic benefits
2. Employment
3. Tourism seasonality

SOCIETY and CULTURE

4. Local satisfaction with tourism
5. Governance
6. Accessibility
7. Cultural preservation ★

ENVIRONMENT

8. Energy management
9. Water resource management
10. Sewage treatment
11. Solid waste management
12. Actions for climate change
13. Conservation of natural environment ★

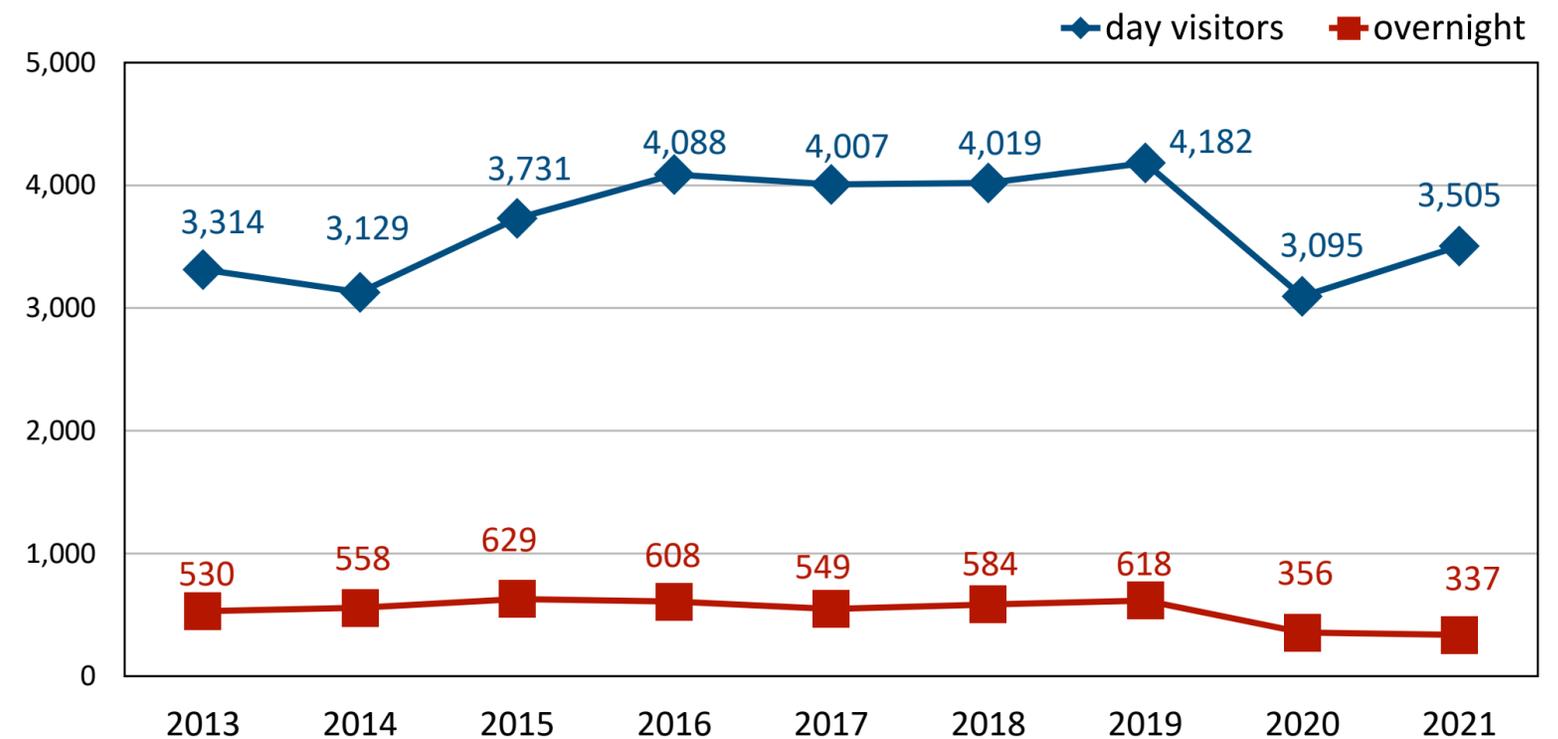
★ Areas of issue added independently by Gifu Prefecture

4.1. Destination's Economic Benefits (overall)

[Issues]

- Due to the outbreak of the COVID-19, the number of visitors and the amount of tourism consumption have decreased significantly since 2020, and an early recovery is an urgent issue.
- The tourism industry is susceptible to disasters, including infectious diseases, as well as political and economic conditions, making it a challenge to ensure sustainable and stable tourism demand.
- It is necessary to increase the time spent and the amount spent by constructing excursion routes, enhancing experience programs, and uncovering new attractions.

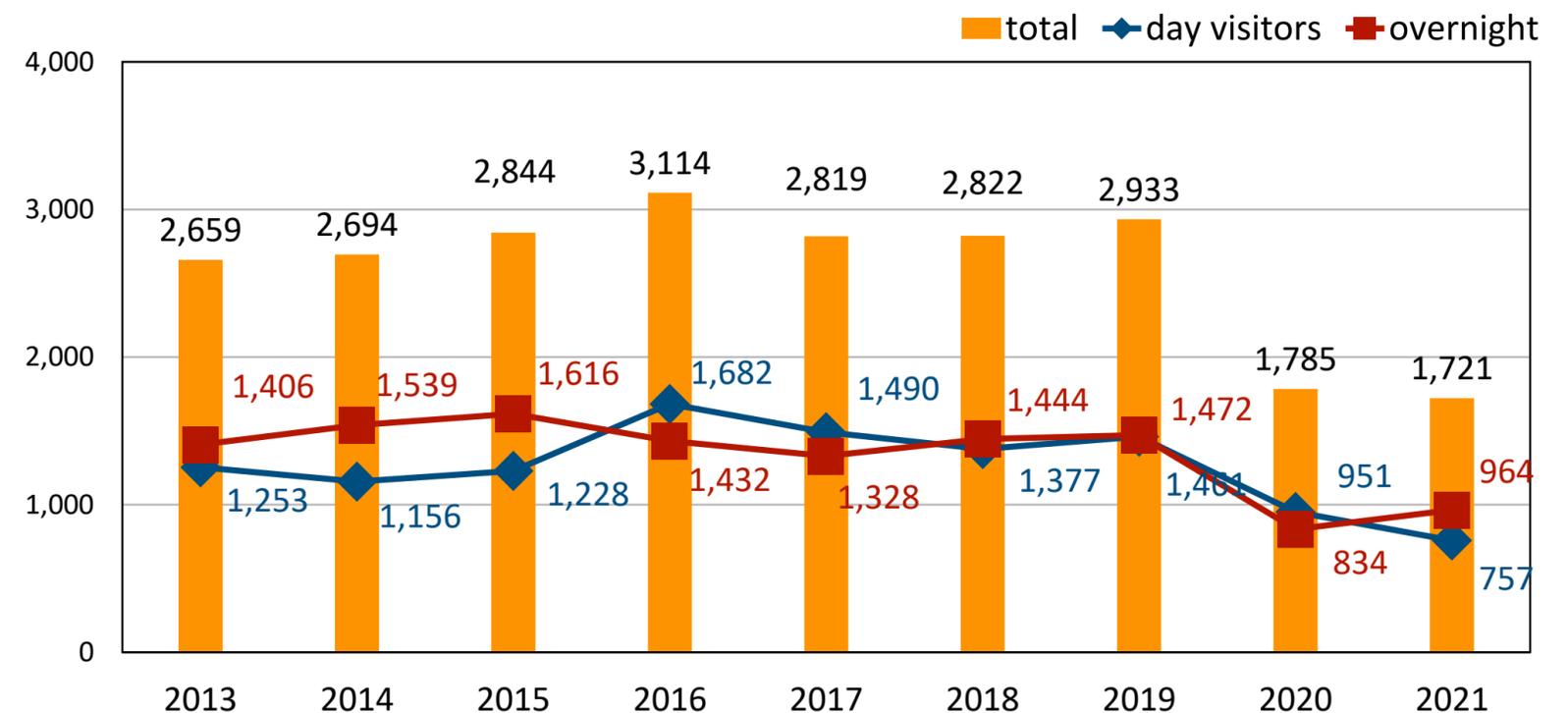
<Number of visitors (actual number of people): 10 thousands>



[Major Initiatives]

- Improvement of tourism resources and the environment for receiving visitors
- Creation of experience programs that are unique to the region
- Implementing a campaigns to encourage tourists to visit and consume
- Promotion of visitor attraction through wide-area cooperation with neighboring prefectures
- Effective information dissemination through digital marketing
- Proposing of new travel styles (driving tourism, snow activities, etc.)

<Tourism Consumption: 100 million yen>



4.1. Destination's Economic Benefits (inbound)

[Issues]

- The number of foreign overnight guests quadrupled from 417,000 in 2013 to 1.66 million in 2019. The percentage of total overnight stays exceeded 20% in 2018, boosting the overall number of overnight stays.

- In preparation for the resumption of full-scale inbound tourism, it is necessary to make efforts to differentiate Gifu from other regions in order to become the destination of choice for travelers around the world.

[Major Initiatives]

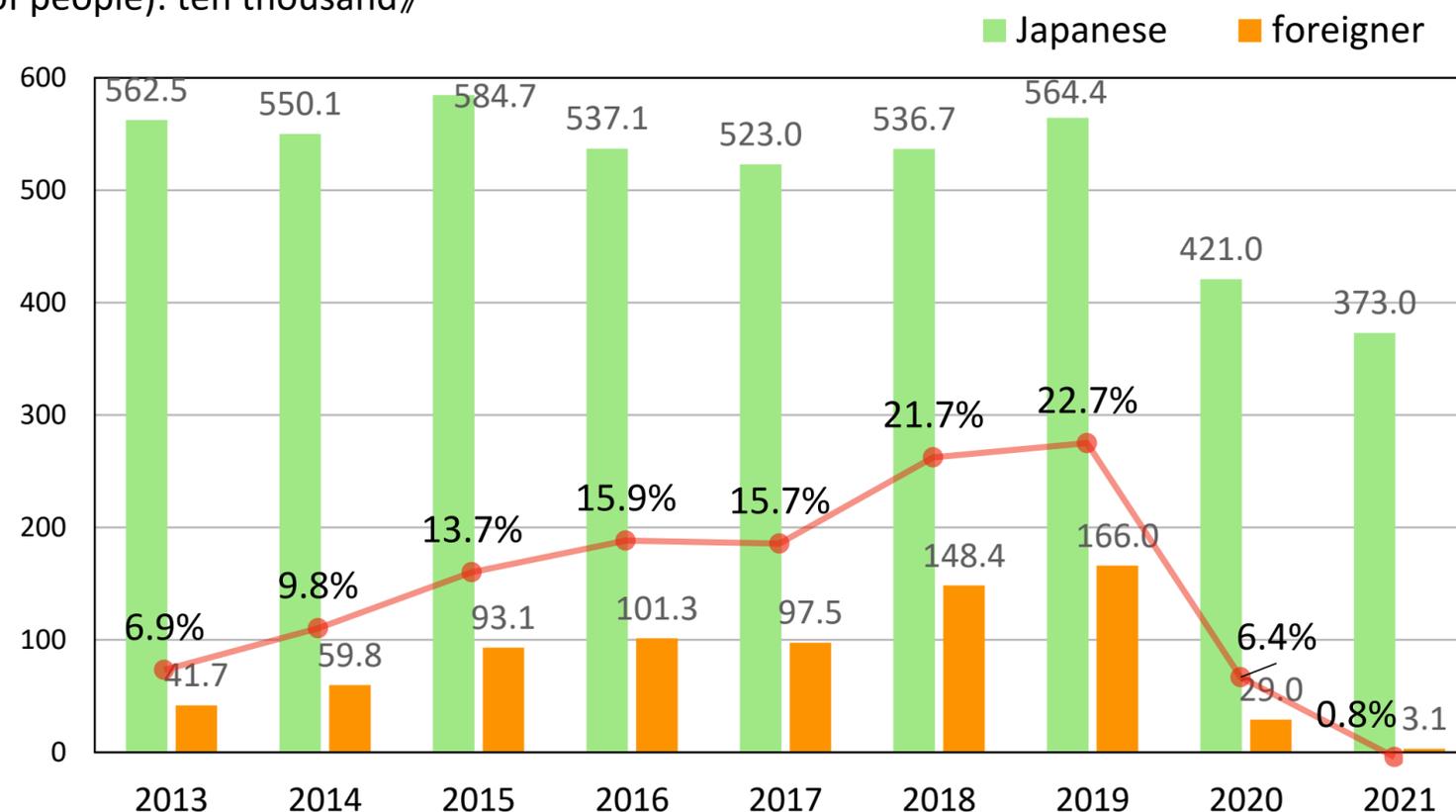
- Promoting sustainable attractions based on Gifu Prefecture's brand concept "Timeless Japan, Naturally an Adventure"

- Creation of experience programs utilizing the nature, history, and traditional culture unique to Gifu Prefecture

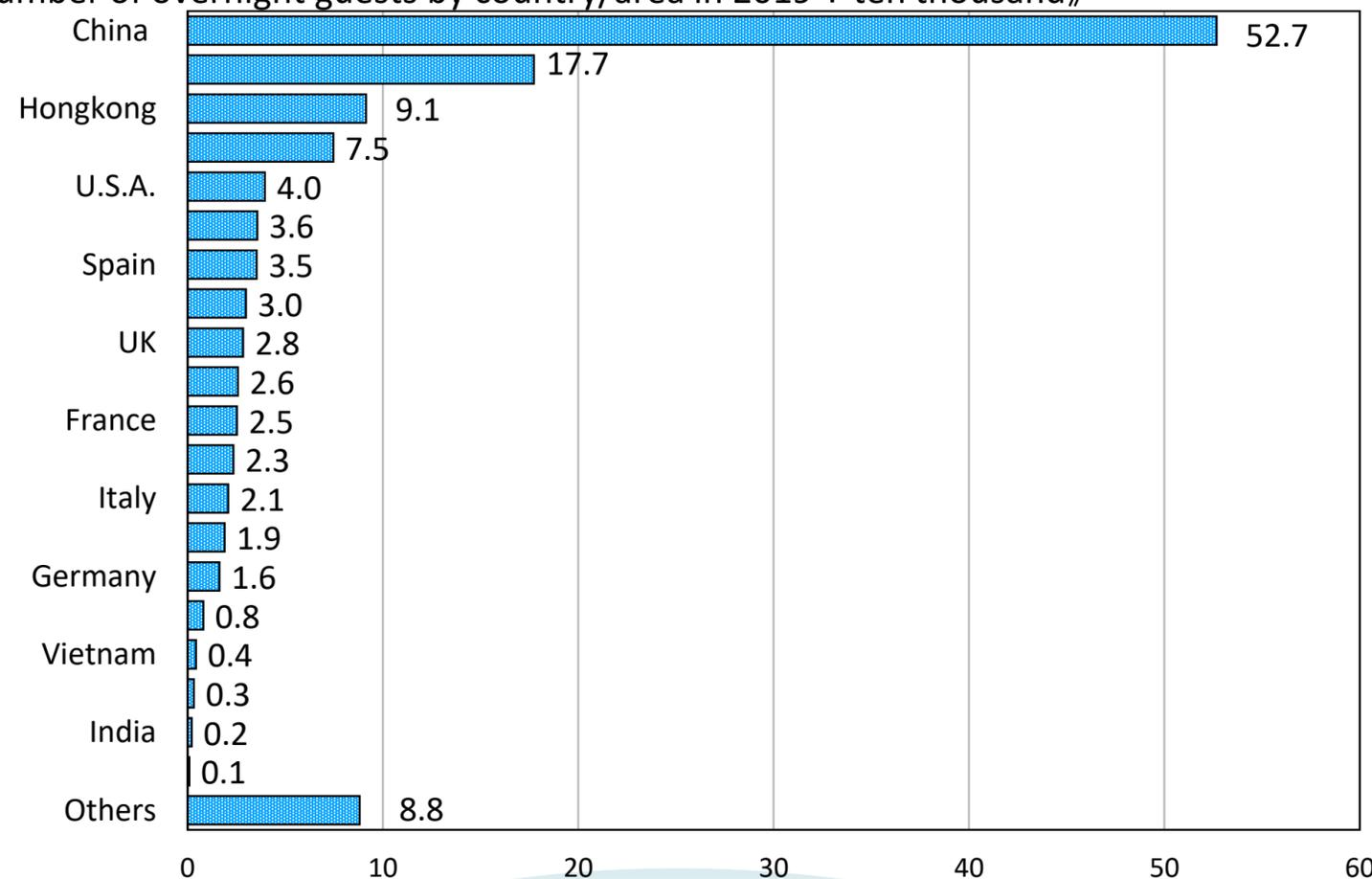
- Creation of travel products in cooperation with local travel agencies in Taiwan, Hong Kong, Thailand, Malaysia, Singapore, etc., which are sending frequent visitors to Gifu Prefecture.

- Effective information dissemination through the use of overseas PR agencies and digital marketing

《Transition in the number of overnight guests and percentage of foreigners (total number of people): ten thousand》



《Number of overnight guests by country/area in 2019 : ten thousand》



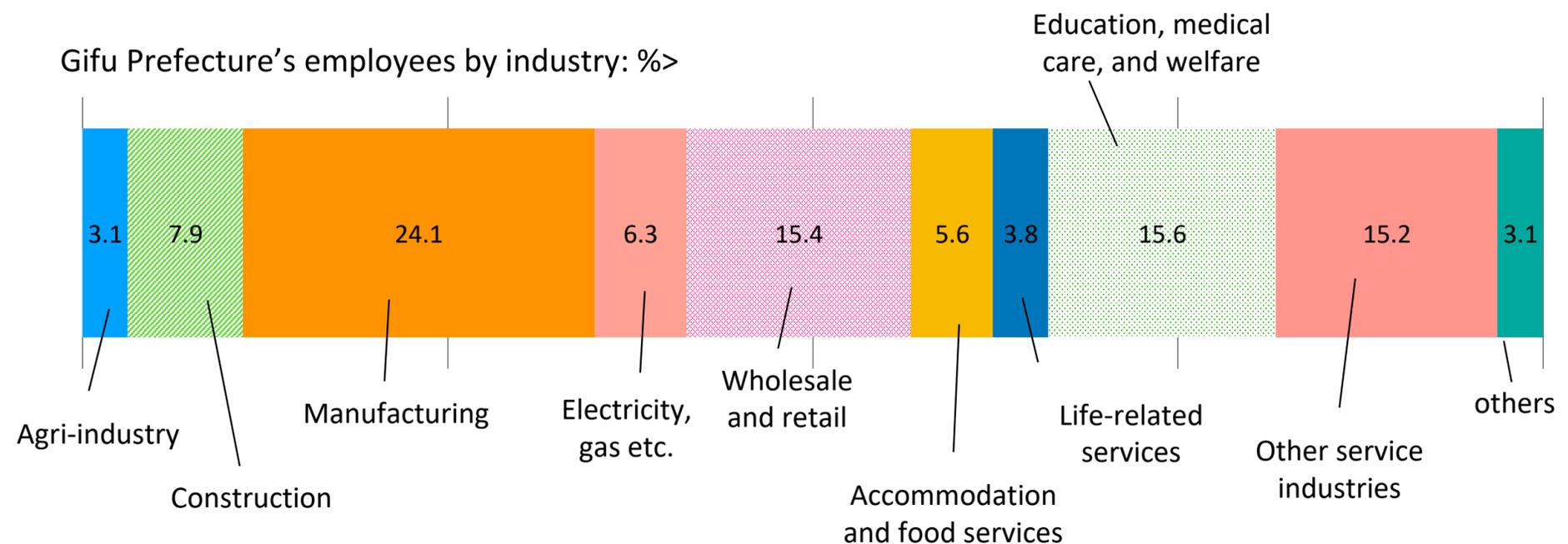
[Indicators]

Item	Indicators	Status quo	Target value ("-"if not applicable)	Data source
Number of visitors	Number of visitors (actual number) total	47.995 million (2019)	53 million (2027)	Gifu Prefecture Tourism Planning Division, "Tourism Visitors Statistical Survey"
	Number of visitors (actual number) day trip	41.82 million (2019)	—	Gifu Prefecture Tourism Planning Division, "Tourism Visitors Statistical Survey"
	Number of visitors (actual number) overnight	6.175 million (2019)	—	Gifu Prefecture Tourism Planning Division, "Tourism Visitors Statistical Survey"
	Number of visitors (total number) overnight	7.304 million (2019)	—	Japan Tourism Agency, "Overnight Travel Statistics Survey"
	Number of visitors (actual number) overnight	6.236 million (2019)	—	Japan Tourism Agency, "Overnight Travel Statistics Survey"
	Number of accommodations	1,072 (2019)	—	Japan Tourism Agency, "Overnight Travel Statistics Survey"
	Accommodation capacity occupancy rate	36.8% (2019)	—	Japan Tourism Agency, "Overnight Travel Statistics Survey"
	Number of visitors to events (total number)	9.354 million (2019)	—	Gifu Prefecture Tourism Planning Division, "Tourism Visitors Statistical Survey"
	Number of international conferences held	13 (2019)	—	Japan National Tourism Organization, "International Conference Statistics"
Economic Impact of Tourism	Economic ripple effect on production	410.274 billion yen (2019)	—	Gifu Prefecture Tourism Planning Division, "Tourism Visitors Statistical Survey"
	Tourism Consumption (total)	293.28 billion yen (2019)	360 billion yen (2027)	Gifu Prefecture Tourism Planning Division, "Tourism Visitors Statistical Survey"
	Tourism Consumption (day trip)	146.13 billion yen (2019)	—	Gifu Prefecture Tourism Planning Division, "Tourism Visitors Statistical Survey"
	Tourism Consumption (overnight)	147.15 billion yen (2019)	—	Gifu Prefecture Tourism Planning Division, "Tourism Visitors Statistical Survey"
	Tourism Consumption per capita (total)	6,111 yen (2019)	—	Gifu Prefecture Tourism Planning Division, "Tourism Visitors Statistical Survey"
	Tourism consumption per capita (day trip)	3,494 yen (2019)	—	Gifu Prefecture Tourism Planning Division, "Tourism Visitors Statistical Survey"
	Tourism Consumption per capita (overnight)	23,830 yen (2019)	—	Gifu Prefecture Tourism Planning Division, "Tourism Visitors Statistical Survey"
Inbound Trends	Number of inbound visitors (total number)	1.66 million (2019)	2 million (2027)	Japan Tourism Agency, "Overnight Travel Statistics Survey"
	Percentage of inbound visitors among all visitors (total number)	22.7% (2019)	—	Japan Tourism Agency, "Overnight Travel Statistics Survey"
	Tourism consumption per capita	29,000 yen (2019)	—	Japan Tourism Agency, "Survey of Foreign Visitor Consumption Trends"
Promotional Effects	Number of accesses to the "Gifu Travel Guide", Gifu Prefecture's website for Japanese	3.266 million (2021)	3.5 million (2023)	Gifu Prefecture Tourism Federation
	Number of pageviews to "Visit GIFU," Gifu Prefecture's website for foreigners	412,000 PV (2022)	—	Gifu Prefecture Tourism Promotion Division
	Number of inflows through natural search on "Visit GIFU"	83,000 (2022)	—	Gifu Prefecture Tourism Promotion Division
	Gifu Prefecture Tourism Official SNS Cumulative Number of Followers and Channel Registrations -Japanese (Facebook, Instagram, Twitter, Youtube)	Total 26,000 (as of the end of 2022)	—	Gifu Prefecture Tourism Federation
	Gifu Prefecture Tourism Official SNS Cumulative Number of Followers and Channel Registrations -English (Facebook, Instagram, Youtube)	Total 24,000 (as of the end of 2022)	—	Gifu Prefecture Tourism Promotion Division
Visitor Satisfaction	Visitor satisfaction (overall) 5-point scale	4.28 (2020)	4.30 (2023)	Gifu Prefecture Tourism Federation
	Percentage of repeaters	94.2% (2021)	94.0% (2023)	Gifu Prefecture Tourism Federation

4.2. Employment

[Issues]

- The number of workers in the tourism industry (accommodation and food services) was 56,833 in 2015, accounting for 5.6% of the total number of workers. (Ministry of Internal Affairs and Communications, "National Census")
- The shortage of human resources and successors in the tourism industry is becoming more serious. Furthermore, wage levels in the tourism industry tend to be low, which is one of the reasons for the shortage of human resources.
- Productivity enhancement through improvement of the working environment and use of digital technology is an issue.
- In a society with a declining population, the utilization of foreign human resources is also key to securing human resources.



Source: Ministry of Internal Affairs and Communications, "National Census" (2015)

[Major Initiatives]

- Support for improving the productivity and working environment of lodging facilities through the subsidy program
- Conducting lectures on the appeal of the tourism industry and human resource coordination meetings.

[Indicators]

Item	Indicators	Status quo	Target value ("-"if not applicable)	Data source
Impact of Tourism on Employment	Employment Induced Effects of Tourism Consumption	35,588 (2019)	—	Gifu Prefecture Tourism Planning Division, "Tourism Visitors Statistical Survey"
	Number of establishments of "Accommodation and food services", percentage of all establishments	10,523 11.2% (2021)	—	Ministry of Internal Affairs and Communications and Ministry of Economy, Trade and Industry "Economic Census 2021"
	Number of workers of "Accommodation and food services", percentage of all workers	56,833 5.6% (2015)	—	Ministry of Internal Affairs and Communications, "National Census"
Shortage of labor	Job turnover rate of "Accommodation and food services"	25.6% (2021)	—	Ministry of Health, Labour and Welfare, "Survey on Employment Trends"
	Jobs-to-applicants ratio of "Food and Beverage Preparation Occupations"	2.99 times (2022)	—	Gifu Labour Bureau, "General Employment Placement Status"
	Jobs-to-applicants ratio of "Customer service and serving occupations"	3.08 times (2022)	—	Gifu Labour Bureau, "General Employment Placement Status"
Labor Profitability	Labor profitability (GDP/number of workers in "Accommodation and food services"), with the average for all industries set at 100	4,144 thousand yen 52.1% (2019)	—	Gifu Prefecture Statistics Division, "Prefectural Accounts"
Wage level	Gross cash wages per capita of "Accommodation and food services" (monthly, annual average, establishment size of 5 or more), with the average for all industries set at 100	98,903 yen 31.0% (2021)	—	Gifu Prefecture Statistics Division, "Monthly Labour Survey"
	Gross cash wages per capita of "Accommodation and food services" (monthly, annual average, establishment size of 30 or more), with the average for all industries set at 100	124,207 yen 33.7% (2021)	—	Gifu Prefecture Statistics Division, "Monthly Labour Survey"
Employment of people with disabilities	Actual employment rate of people with disabilities in all businesses	2.35% (2022)	2.70% (2027)	Gifu Labour Bureau, "Employment Status of People with Disabilities"
	Actual employment rate of people with disabilities in "Accommodation and food services"	1.89% (2022)	—	Gifu Labour Bureau, "Employment Status of People with Disabilities"

4.3. Tourism Seasonality

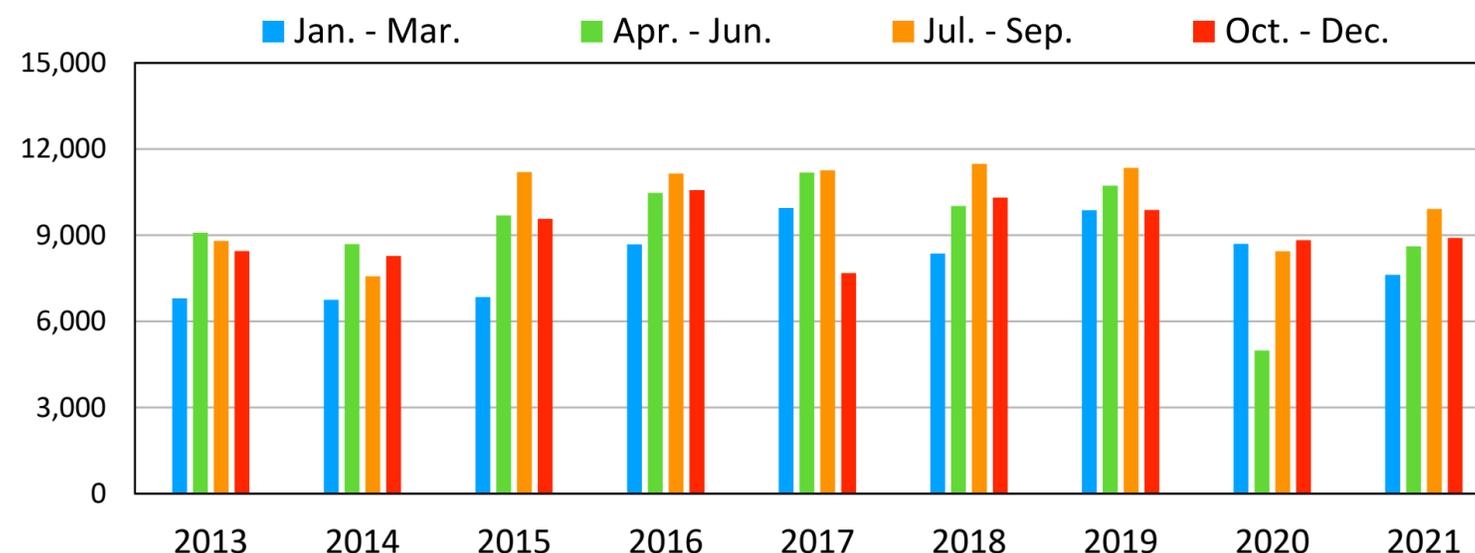
[Issues]

- The number of day-travelers tends to increase during the April-June and July-September periods. January-March period is the quiet season except in 2017.
- The number of overnight visitors is highest during the July-September period, accounting for 30% of the total. There are no significant differences between the other seasons.
- The number of foreign guests doubled in 2018 and 2019 from January to March and October to December, when the number of domestic guests is relatively low. Foreign overnight guests with different vacation periods and needs are an important key to equalizing seasonality.

[Major Initiatives]

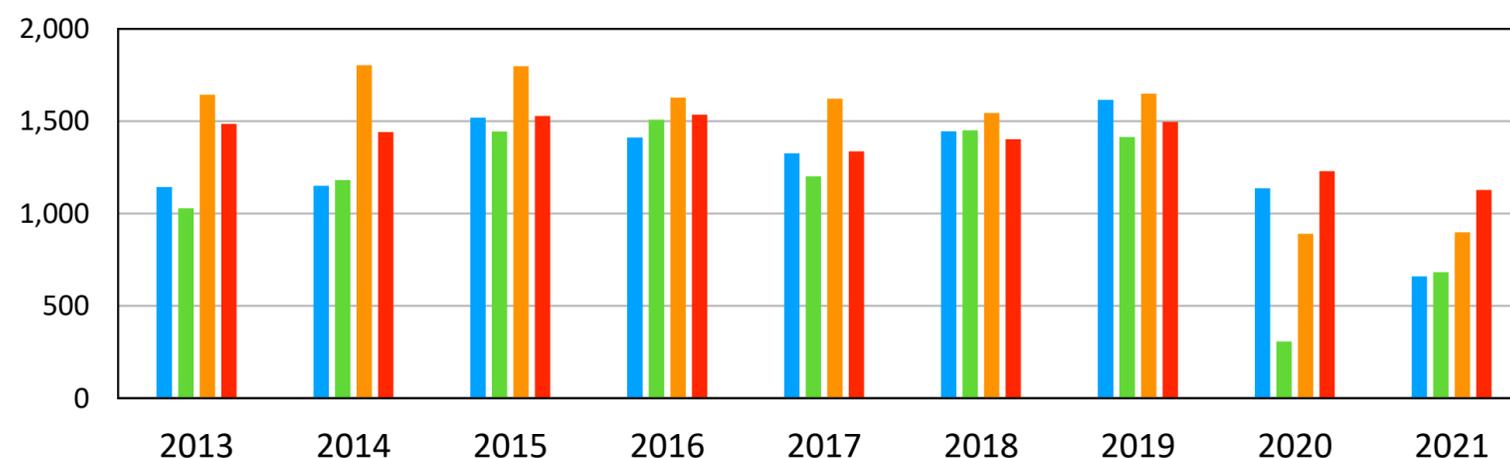
- Winter inbound promotion for countries/regions with no snowfall
- In cooperation with expressway management companies, create a discounted excursion plan within the prefecture with a higher discount rate for weekday daytime tolls.

<Number of day trip visitors (actual number of persons): ten thousands>



Jan. - Mar.	6,803	6,750	6,848	8,679	9,951	8,365	9,873	8,700	7,618
Apr. - Jun.	9,085	8,692	9,695	10,478	11,184	10,022	10,722	4,981	8,610
Jul. - Sep.	8,804	7,566	11,196	11,148	11,258	11,486	11,346	8,440	9,915
Oct. - Dec.	8,447	8,280	9,572	10,574	7,678	10,311	9,879	8,828	8,903
Ave.	8,285	7,822	9,328	10,220	10,018	10,046	10,455	7,737	8,762
Min. q/Ave.	82.1%	86.3%	73.4%	84.9%	76.6%	83.3%	94.4%	64.4%	86.9%

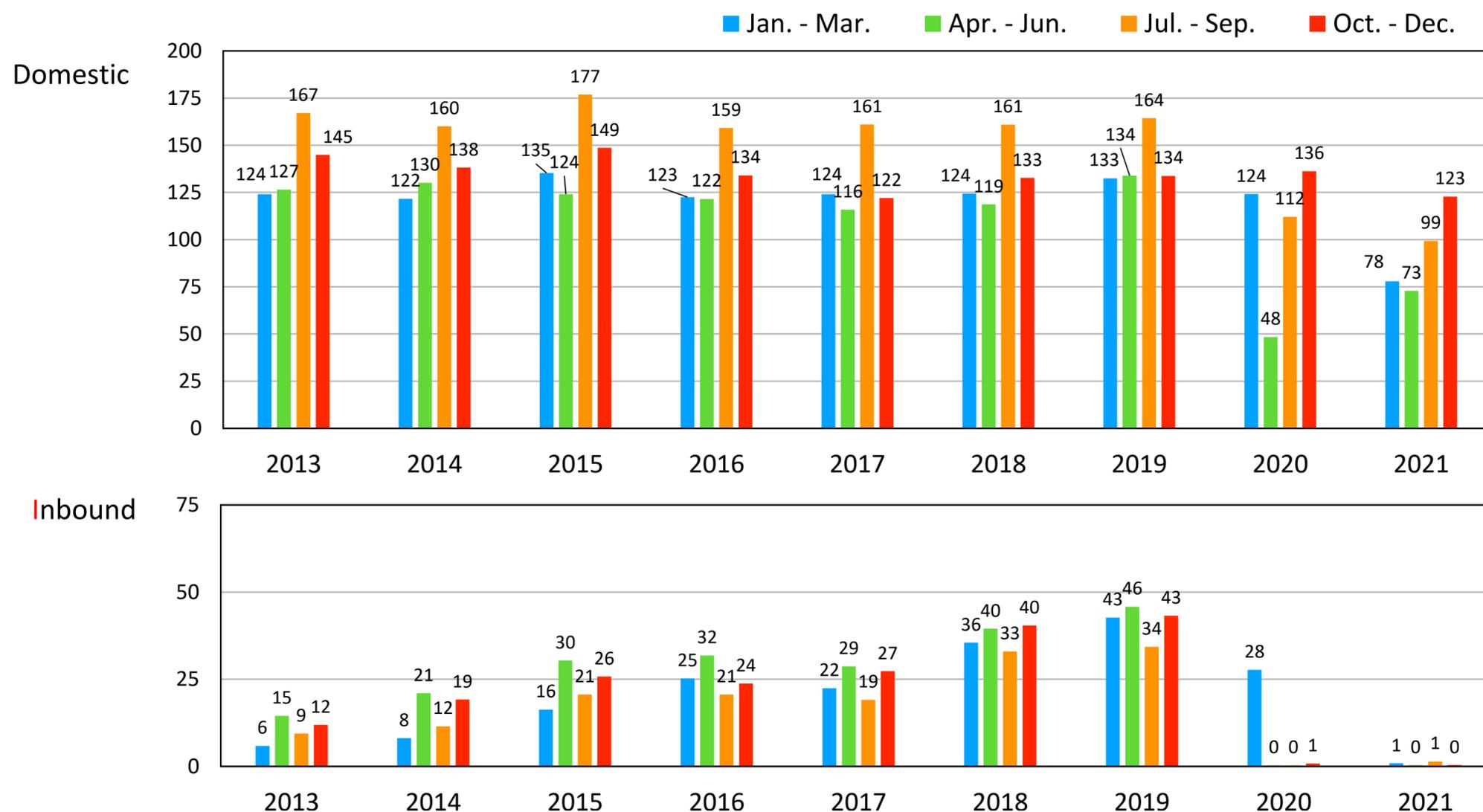
<Number of overnight visitors (actual number of persons): ten thousands>



Jan. - Mar.	1,143	1,150	1,519	1,412	1,326	1,445	1,615	1,137	660
Apr. - Jun.	1,029	1,181	1,444	1,508	1,201	1,451	1,415	307	682
Jul. - Sep.	1,644	1,803	1,798	1,627	1,622	1,545	1,649	890	899
Oct. - Dec.	1,486	1,441	1,528	1,535	1,337	1,402	1,496	1,230	1,128
Ave.	1,326	1,394	1,572	1,521	1,372	1,461	1,544	891	842
Min. q/Ave.	77.6%	82.5%	91.8%	92.9%	87.6%	96.0%	91.7%	34.5%	78.4%

4.3. Tourism seasonality

《Number of overnight guests (total number of people): ten thousands》



Source: Japan Tourism Agency, "Overnight Travel Statistics Survey."

[Indicators]

Item	Indicators	Status quo	Target value ("-"if not applicable)	Data source
Seasonal variations in tourism	Ratio of minimum number of visitors per quarter to the average -day trip (actual number)	94.4% [Jan-Mar] (2019)	—	Gifu Prefecture Tourism Planning Division, "Tourism Visitors Statistical Survey"
	Ratio of minimum number of visitors per quarter to the average -overnight (actual number)	91.7% [Apr-Jun] (2019)	—	Gifu Prefecture Tourism Planning Division, "Tourism Visitors Statistical Survey"
	Ratio of minimum number of visitors per month to the average - overnight (total number)	85.6% [June] (2019)	—	Japan Tourism Agency, "Overnight Travel Statistics Survey"
	Ration of minimum number of inbound visitors per month to the average -overnight (total number)	72.5% [September] (2019)	—	Japan Tourism Agency, "Overnight Travel Statistics Survey"
	Ratio of minimum accommodation capacity occupancy rate per month to the average (total number)	86.1% [June] (2019)	—	Japan Tourism Agency, "Overnight Travel Statistics Survey"

[Issues]

- In Shirakawa Village and other areas, especially where tourist attractions and residential areas overlap, poor tourist manners and violation of residents' privacy have often become problems, and measures have been taken to educate tourists about manners and ease congestion.
- In municipalities that focus on tourism, policies that emphasize tourism may draw opposition from non-tourism-related individuals, so sufficient explanation of tourism promotion and policy planning that incorporates the opinions of residents are required.
- While surveys on tourist satisfaction are often conducted, there are few opportunities to survey local residents on their satisfaction with tourism.

[Major Initiatives]

- Listening to a wide range of opinions from residents and experts when formulating and revising tourism-related plans
- Conducting surveys on local satisfaction with tourism

[Indicators]

Item	Indicators	Status quo	Target value ("-"if not applicable)	Data source
Livelihood Satisfaction	Local satisfaction with livelihood (Percentage of "fully satisfied" and "generally satisfied")	49.1% (2022)	53.7% (2027)	Gifu Prefecture Public Relations Division, "Prefectural Public Opinion Survey" ※1
Inflow/outflow of population	Population Inflows and Outflows in Social Dynamics	-6360 (2021)	—	Gifu Prefecture Statistics Division, "Vital Statistics"
	Number of migrants	1,696 (2021)	8,000 (Cumulative total for 2023-2027)	Gifu Prefecture Regional Development Division

The above indicators are used as a guide to measure whether Gifu Prefecture is a comfortable place to live and whether the region is attractive. In the future, we will consider conducting a survey on local satisfaction with tourism.

(Reference: Results of a survey conducted in the middle reaches of the Kiso River in 2022-2023 are shown on page 34)

※1 The prefectural public opinion survey has been conducted annually since 1967 (biennially from 1988 to 2006) to find out the prefectural citizens' awareness and their level of interest in and satisfaction with prefectural administration, and to provide basic data for promoting prefectural government. Sample size in 2022 is 3,000 (53.9% valid response rate). In the "Livelihood Satisfaction" section, respondents are asked to select one answer from the following options: "Fully satisfied," "Generally satisfied," "Still dissatisfied," "Extremely dissatisfied," or "Don't know".

[Reference: Results of a survey conducted in five cities and towns in the middle reaches of the Kiso River]

Gifu Prefecture and five cities and towns in the basin of the middle reaches of the Kiso River established a council to promote tourism. As part of its efforts, a survey was conducted to develop sustainable tourism destination.

Target: Local residents and local tourism businesses (139 valid responses)

Survey period: October 15, 2022 - January 31, 2023

Method: Asked local residents via event vendors and municipalities



The middle reaches of the Kiso River

Main Questions and Tabulated Results :

① Is tourism necessary for the region?

I agree very much.	48
I agree.	74
Neither.	10
I don't agree.	3
I don't agree at all.	2
Unanswered.	2

② What impact do you think tourism will have on the region? (multiple responses)

The region comes alive.	94
The region gains more publicity.	62
New services, businesses, and jobs will increase.	62
Roads, utilities, and landscaping will be improved.	42
The number of migrants and permanent residents will increase	26
Garbage will increase	26
Means of public transportation will increase	22
Nature and landscape will be destroyed.	15
Public safety will worsen.	10
Others	8

③ What is needed as tourism policy?

Conservation and utilization of nature and landscape	71
Preservation and utilization of history and culture	53
Improvement of tourist and lodging facilities, public facilities, etc.	49
Gourmet and souvenir development	42
Development of means of transportation (rail, bus, cab, bicycle rental)	42
Organizing festivals and events	35
Promotion	26
Training of tourist guides	20
Local hospitality	19
Inbound tourism	12

[Issues]

- There are eight DMOs in the prefecture (see table on the right) that are working to create tourism regions that unite local communities. However, marketing methods and analysis differ among DMOs, making it necessary to improve overall functions and revitalize the efforts of each region.
- Five regions in the prefecture have been selected as model areas by the Japan Tourism Agency, and three of them have been selected as Green Destinations “Top 100 World’s Sustainable Tourism Destination Stories.” Based on the "Japanese Sustainable Tourism Standards for Destinations (JSTS-D)," it is necessary to promote the creation of sustainable tourism areas throughout the prefecture by bringing together various local stakeholders, and it is important to involve non-tourism stakeholders as well.

[Major Initiatives]

- The "NEXT GIFU HERITAGE “programme
- The establishment of a subsidy system to encourage the development of sustainable tourism initiatives.
- Promotion utilizing international recognition, including selection as one of the Green Destinations “Top100 World’s Sustainable Tourism Destination Stories”.
- Wide-area collaboration (Nagara River basin, middle Kiso River basin, Higashi-Mino historical road, etc.)
- Support for DMO formation and functional enhancement of municipal tourism associations by Gifu Prefecture DMO (training, etc.)

[Indicators]

Item	Indicators	Status quo	Target value ("-"if not applicable)	Data source
Governance using indicators	Number of "NEXT GIFU HERITAGE"	0 (2022)	—	Gifu Prefecture Tourism Planning Division
	Number of regions selected for Green Destinations Top 100 Stories (cumulative total)	3 regions (2022)	—	Gifu Prefecture Tourism Planning Division
Stakeholder engagement	Number of members of Gifu Prefecture Tourism Federation	589 organizations (2020)	—	Gifu Prefecture Tourism Federation
	Number of members (companies and organizations) of SDGs Promotion Network	1,166 (2022)	1,650 (2025)	Gifu Prefecture SDGs Promotion Division

DMOs in Gifu Prefecture

Regional Cooperative DMOs (prefecture-wide)

- 1) Gifu Prefecture Tourism Federation

Regional Cooperation DMO (wide-area)

- 2) ORGAN (Gifu City, Seki City, Mino City, Gujo City)
- 3) Ogaki City Tourism Association
(12 cities and towns in the Seino area)

Regional DMOs (each region)

- 4) Gujo City Tourism Federation (Gujo City)
- 5) Hida Takayama Tourism & Convention Association (Takayama City)
- 6) Gero Onsen Tourist Association (Gero City)
- 7) Tajimi City Tourism Association (Tajimi City)
- 8) ZIVA-SCRUM ENA (Ena City, Japan)

[Issues]

- In order for anyone, regardless of age, nationality, or disability, to enjoy a safe and comfortable trip within the prefecture, it is necessary to improve the reception environment in terms of both hardware and software. In particular, the improvement of services provided by tourism businesses and the dissemination of detailed information are issues to be addressed in the soft aspects of tourism.

[Major Initiatives]

- Establishment of the Gifu Prefecture Accessible Tourism Promotion Council, consisting of various related organizations and governments, such as the physically disabled, visually impaired, hearing impaired, and federations of senior citizen clubs, to regularly exchange opinions on measures to promote accessible tourism.
- Disseminate information on the accessible status of tourism facilities and model courses through a dedicated website (<https://www.flat-gifu.com/>).
- Conduct a survey on the accessible status of sightseeing spots in the prefecture and publicize the survey results.
- Conduct training and seminars on accessible tourism for tourism business operators and residents of the prefecture.
- Production and distribution of videos of model tourism courses in the prefecture by influencers with disabilities

[Indicators]

Item	Indicators	Status quo	Target value ("-"if not applicable)	Data source
Dissemination of accessible tourism and improvement of reception environment	Number of views of Gifu Prefecture's accessible tourism website	104,348 PV (2021)	—	Gifu Prefecture Tourism Planning Division
	Number of tourism-related facilities listed on the Gifu Prefecture accessible tourism website	249 (2022)	—	Gifu Prefecture Tourism Planning Division



Dissemination of accessible status of tourism destinations



Hospitality training for tourism businesses

4.7. Cultural Preservation

[Issues]

- Gifu Prefecture is home to many traditional cultures that have been passed down over the centuries, such as Nagara River *Ukai* cormorant fishing, a traditional fishing method with a 1,300-year history, and ji-kabuki, a traditional performing art in which playhouses have remained since the Edo period. Traditional industries known as "Takumi no Waza" (artisan crafts), such as Mino washi paper, Seki cutlery, Tono ceramics, and Hida woodworks, are also an attraction.
- Six districts are registered as Important Preservation Districts for Groups of Traditional Buildings, which have been nurtured and preserved in the daily lives of the people. (List on page 38)
- The number of inheritors is decreasing due to the aging of the population and a decline in interest in local traditional culture, making the protection and transmission of these traditions an issue.

[Major Initiatives]

- Received international recognition such as UNESCO "World Heritage/Intangible Cultural Heritage" and FAO "Globally Important Agricultural Heritage System" (List on page 38).
- Promotion in Japan and overseas using cultural resources such as various heritage sites, Nagara River *Ukai* cormorant fishing, and ji-kabuki.
- Support for product development, sales channel development, and successor training for traditional industries

[Indicators]

Item	Indicators	Status quo	Target value ("-"if not applicable)	Data source
Preservation of traditional arts	Number of Ji-kabuki preservation groups	32 (2022)	—	Gifu Prefecture Cultural Heritage Division
	Number of Ningyo joruri (Bunraku) preservation groups	6 (2022)	—	Gifu Prefecture Cultural Heritage Division
	Number of Noh Kyogen preservation groups	1 (2022)	—	Gifu Prefecture Cultural Heritage Division
	Number of Shishishibai preservation groups	6 (2022)	—	Gifu Prefecture Cultural Heritage Division
	Number of participants in Ji-kabuki and Bunraku/Noh experience classes	5,223 (2022)	9,000 (2027)	Gifu Prefecture Cultural Heritage Division
Utilization of Cultural Heritage	Sales of Mino Washi Brand Cooperative member businesses	6.42 billion yen (2021)	—	Gifu Prefecture Local Industry Promotion Division
	Number of M-brand certified products	344 (2023)	—	Gifu Prefecture Local Industry Promotion Division
	Independence of young successors of Mino Washi	5 (2022)	—	Gifu Prefecture Local Industry Promotion Division
Preservation of World Agricultural Heritage	Number of participants in the traditional fishing experience course in Seki City	24 (2018)	30 (2023)	Gifu Prefecture Satokawa Promotion Division, "GIAHS Conservation Plan"
	Number of Cormorant Boat Carpenters	1 (2018)	3 (2023)	Gifu Prefecture Satokawa Promotion Division, "GIAHS Conservation Plan"
	Haul of Ayu fish	342t (2021)	350t (2027)	Gifu Prefecture Satokawa Promotion Division, "Fisheries Development Plan"



Nagara River *Ukai* cormorant fishing



Ji-kabuki

4.7. Cultural Preservation

[List of Important Preservation Districts for Groups of Traditional Buildings]

- Mino-machi, Mino City
- Hondori, Iwamura-cho, Ena City (①)
- Gujo Hachiman Kitamachi, Gujo City
- Sanmachi, Takayama City (②)
- Shimo-ninomachi, Oojinmachi, Takayama City
- Ogimachi, Shirakawa Village



① Hondori, Iwamura-cho



② Sanmachi

[List of International Certifications Acquired]

UNESCO World Heritage/Intangible Cultural Heritage



World Heritage Sites:

- Historic village of Shirakawa-go (1995) (①)



① Shirakawa-go



② Hon-minoshi

Intangible Cultural Heritage

- Hon-minoshi, papermaking in the Mino region (2014) (②)
- Yama, Hoko, Yatai, float festivals (Takayama Festival (③), Furukawa Festival (④), Ogaki Festival (⑤))" (2016)
- Furu-odori, ritual dances imbued with people's hopes and prayers (Gujo-Odori (⑥), Kanomizu no Kakeodori (⑦))" (2022)



③ Takayama Festival



④ Furukawa Festival



⑤ Ogaki Festival

FAO Globally Important Agricultural Heritage System (GIAHS)



Ayu of the Nagara River System (2015)

ICID World Heritage Irrigation Structures



Sodai Irrigation Channel (2015)



⑥ Gujo-odori



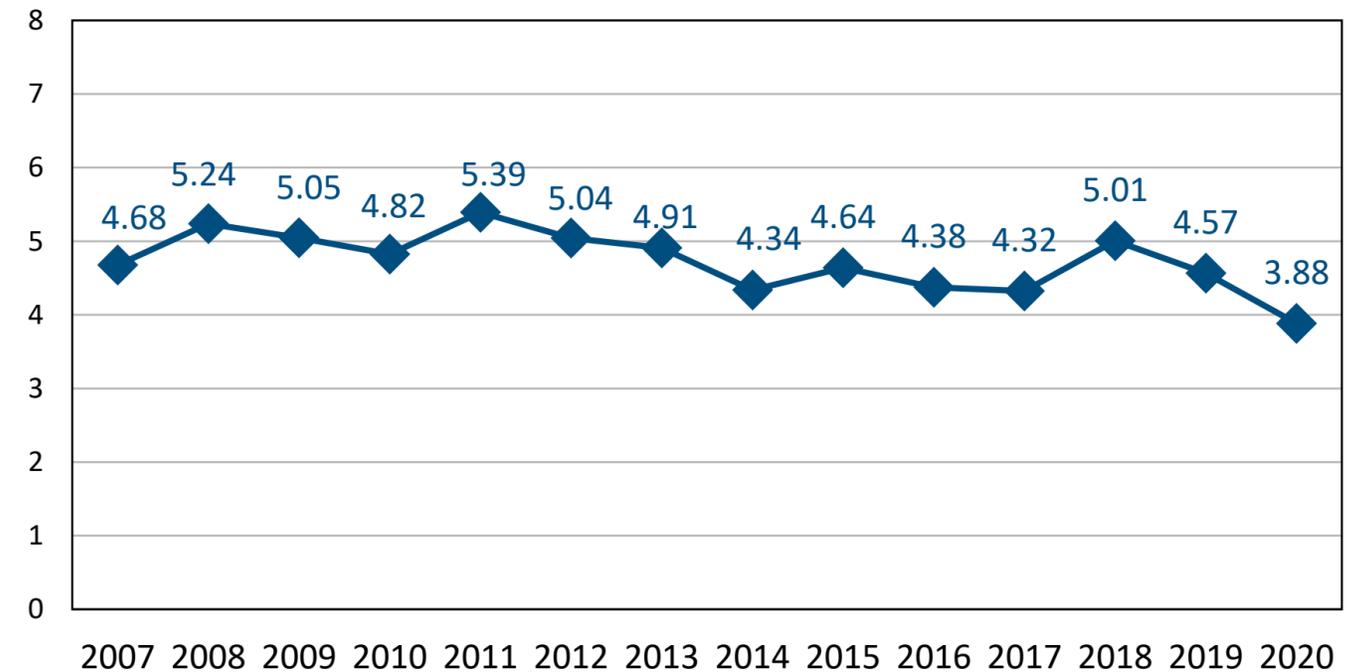
⑦ Kanomizu no Kakeodori

4.8. Energy Management

[Issues]

- The final energy consumption of the lodging and food service industry was less than 4 PJ in 2020, but the "Gifu Prefecture Energy Vision" (formulated in 2022), which provides guidelines for energy policy, sets a target of 24.4% reduction in 2025 and 31.2% reduction in 2030 compared to 2013 for the prefecture as a whole. Further reduction efforts are required.
- The majority of tourists visiting Gifu Prefecture use private cars (82.8%) as their means of transportation. In order to reduce the environmental impact of tourism, the spread of electric vehicles (EVs, PHVs, FCVs) and the development of infrastructure to improve convenience are required.

<Final Energy Consumption (Lodging and Food Services): PJ >

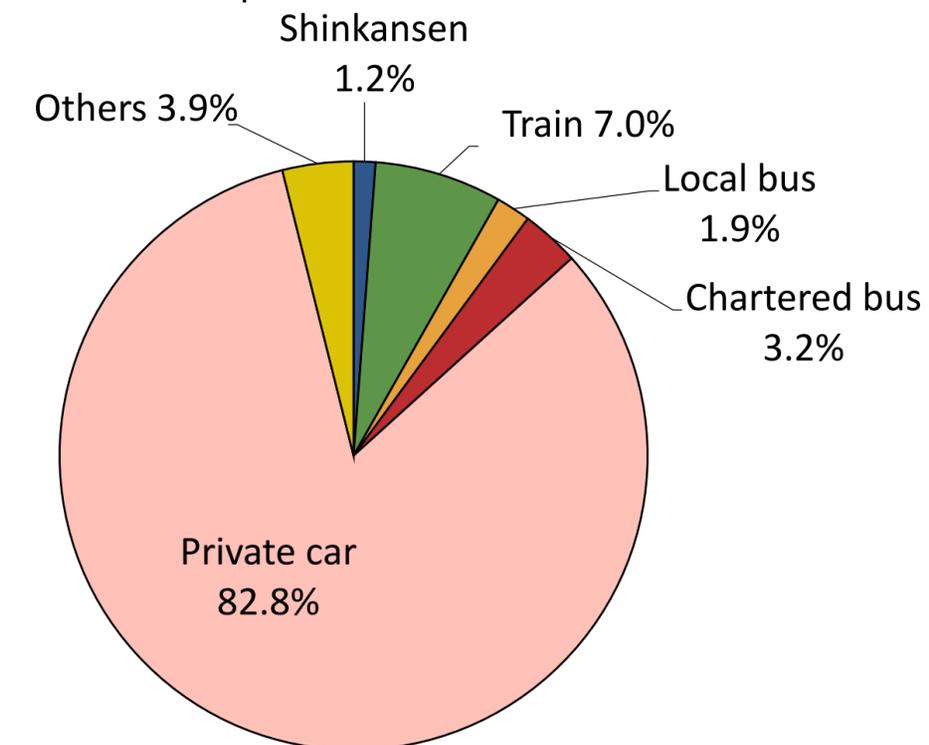


Source: Agency for Natural Resources and Energy, "Energy Consumption Statistics by Prefecture" *Preliminary figures for FY2020

[Major Initiatives]

- Introduce renewable energy sources such as solar power generation to prefectural facilities and conserve energy.
- Establish a consultation service for the introduction of renewable energy and energy conservation.
- Support businesses by dispatching experts and coordinators on energy conservation and decarbonization in cooperation with related organizations.
- Financing for the introduction of renewable energy and energy conservation by businesses in the prefecture in cooperation with financial institutions, etc.
- Support for introduction of energy storage facilities and EMS
- Support for acquisition of energy-efficient housing such as ZEH and energy-efficient renovation of existing housing
- Support for renewal of prefectural official vehicles to electric vehicles and purchase of FCVs

<Main means of transportation for tourists>



Source: "Gifu Prefecture Tourism Visitors Survey," Gifu Prefecture

[Indicators]

Item	Indicators	Status quo	Target value ("-"if not applicable)	Data source
Reduced energy consumption	Final energy consumption	167.6 PJ (2019)	143.0PJ (2025) 130.2PJ (2030)	Agency for Natural Resources and Energy , "Energy Consumption Statistics by Prefecture"
	Final energy consumption in "Accommodation and food services" ①	4.6 PJ (2019)	—	Agency for Natural Resources and Energy , "Energy Consumption Statistics by Prefecture"
Utilization of renewable energy	Renewable energy generation	9.73 PJ (2021)	13.88PJ (2025) 21.64PJ (2030)	Tariff Scheme Information Publication Website
	Renewable energy ratio (Renewable energy generation /Electricity consumption out of final energy consumption)	15,4 % (2019)	31.5% (2025) 52.9% (2030)	Gifu Prefecture Commerce, Industry and Energy Policy Division, "Energy Vision"
Improved convenience for electric vehicles	Number of charging stations (cumulative) ②	848 units (2021)	1,880 units (2025)	Gifu Prefecture Commerce, Industry and Energy Policy Division, "Energy Vision"
	Number of hydrogen stations installed (cumulative)	6 units (2021)	11 units (2025)	Gifu Prefecture Commerce, Industry and Energy Policy Division, "Energy Vision"

- Among the above indicators, those closely related to the tourism sector are ① final energy consumption in accommodation and food services and ② the number of charging stations.
- ① has existed as data but has not been particularly utilized until now. By monitoring energy consumption in the accommodation and food services industry, the data will be utilized for measures to improve issues.
- ② has high expectations for the tourism sector and a large role to play, as a subsidy program has been established for installation in parking lots of accommodations and tourist facilities.

[Issues]

- Gifu Prefecture has been constantly monitoring the water quality of public bodies of waters in the prefecture since 1971. Looking at biochemical oxygen demand (BOD), a representative indicator of water quality, the achievement rate of water quality environmental standards for rivers in 2021 was 97.1%, higher than the national average rate (93.1%).

- In 2013, Gifu Prefecture enacted the "Gifu Prefecture Water Source Area Preservation Ordinance" to protect water source areas. The ordinance designates water intake points and surrounding areas as "water source areas" and requires notification of land sales and development activities to the prefecture to promote appropriate land use.

[Major Initiatives]

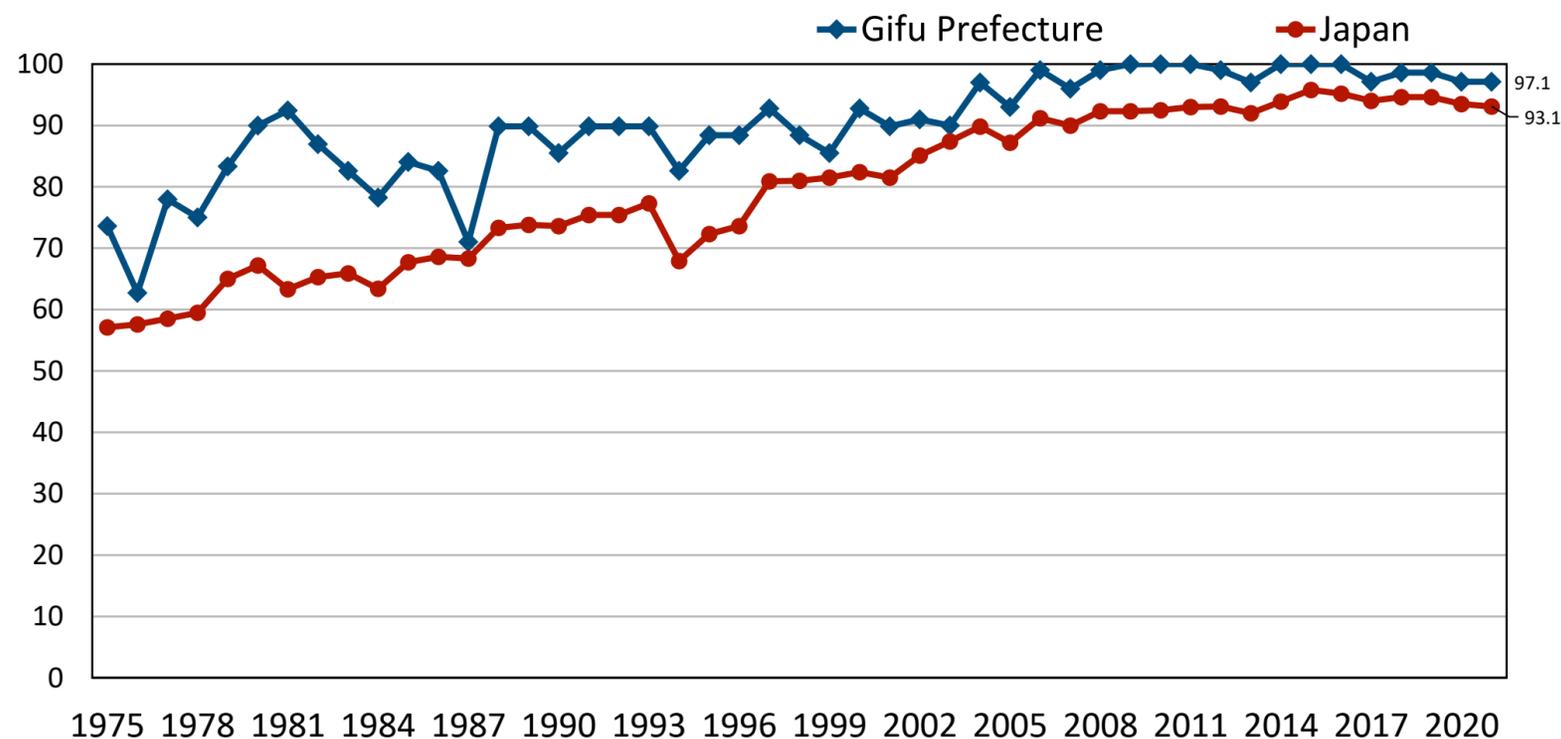
- Conduct periodic water quality surveys
- Gifu Prefecture Forest and Environment Tax is used to support environmental conservation forest maintenance by local governments and forestry enterprises.
- Promote awareness of the importance of water source area conservation among prefectural residents

[Indicators]

Item	Indicators	Status quo	Target value ("-"if not applicable)	Data source
Water Quality Management	Percentage of achievement of the environmental standard of 75% BOD for river water quality	97.1% (2021)	100% (2025)	Gifu Prefecture Environment and Citizen Support Policy Division, "The Sixth Gifu Prefecture Basic Environmental Plan"
Water source management	Designated water source area	269 locations, 68,024 ha (2023)	—	Gifu Prefecture Forestry Preservation Division

Although the above indicators are not tourism-specific, water quality is also very important for the tourism sector. In the mid- to long-term, further measures to improve the water resource environment, such as efforts to reduce water consumption by the tourism industry, will be considered.

<Percentage of water quality standards achieved (river BOD 75% value): %>



Source: Environmental Management Division, Gifu Prefecture

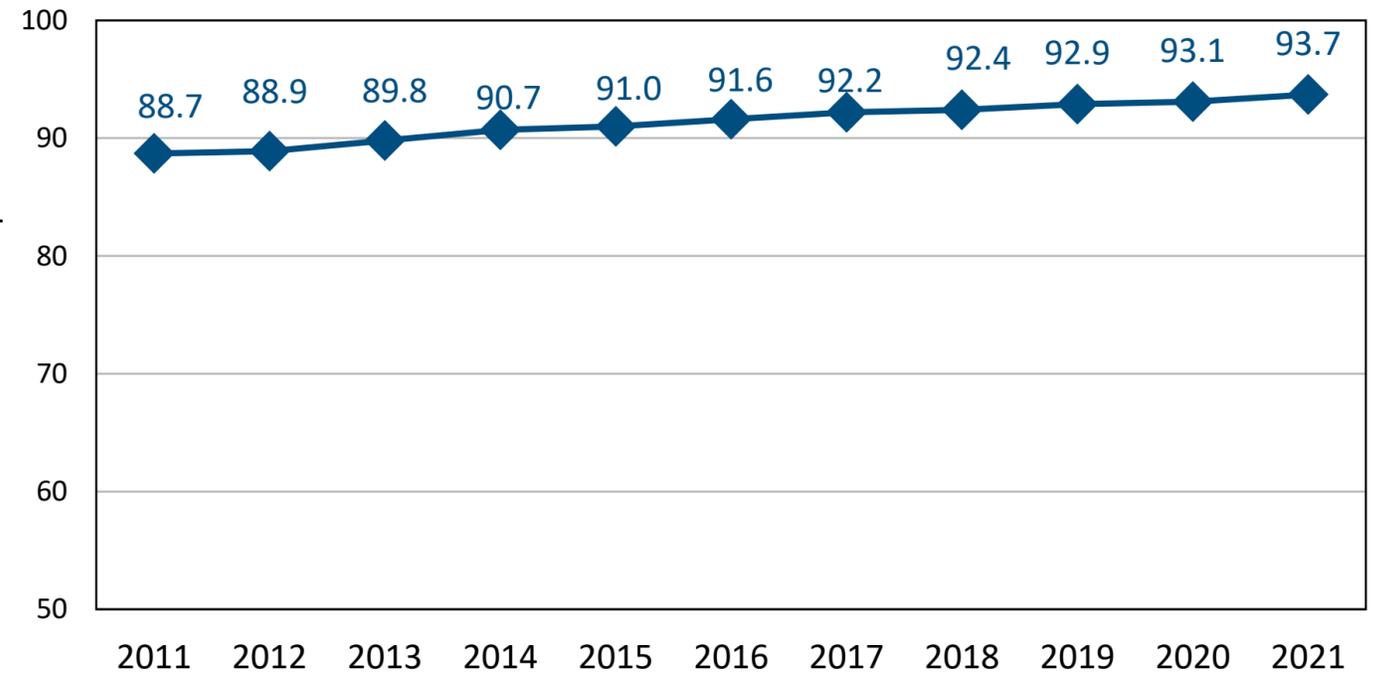
4.10. Sewage Treatment

[Issues]

- In order to preserve a good natural environment, sewage must be properly treated and discharged, and the government has been systematically improving sewage treatment facilities such as sewage systems and septic tanks. As a result, the sewage treatment population penetration rate in 2021 was 93.7%, higher than the national average (92.6%), but the remaining 6.3% needs to be steadily implemented.

- In 2018, Gifu Prefecture established the "Gifu Prefecture Sewage Treatment Facility Development Concept" in response to the aging of collective treatment facilities and the need to address declining user fee revenues due to a declining population. The plan sets such indicators as "sewage treatment population penetration rate," "unpenetrated population," and "current status and outlook of bond issues," and the progress is managed every year.

<Population coverage of sewage treatment: %>



Source: Gifu Prefecture, Sewerage Division

[Major Initiatives]

- Improve sewage treatment facilities based on municipal action plans, aiming for a sewage treatment population penetration rate of at least 95% by 2025.
- To respond to changes in social conditions such as a declining population and the financial situation of municipalities, the development of sewage treatment facilities will be promoted while reviewing maintenance methods.

[Indicators]

Item	Indicators	Status quo	Target value ("-"if not applicable)	Data source
Wastewater management	Sewage Treatment Population Penetration Rate	93.7% (2021)	95% or more (2025)	Gifu Prefecture Sewer Development Division
	unpenetrated population	126,054 (2021)	76,416 (2025)	Gifu Prefecture Sewer Development Division

Although the above indicators are not tourism-specific, proper treatment of sewage is very important for the tourism sector.

4.11. Solid Waste Management

[Issues]

- In 2002, Gifu Prefecture formulated the "Gifu Prefecture Waste Disposal Plan" as a basic policy for waste reduction and proper disposal, and various efforts have been made to reduce the amount of general waste generated.
- The amount of food loss in Gifu Prefecture is estimated to be 62,731 tons per year, or 170 tons per day, and the "Gifu Prefecture Food Loss Reduction Promotion Plan" was formulated in 2022 to reduce this amount.

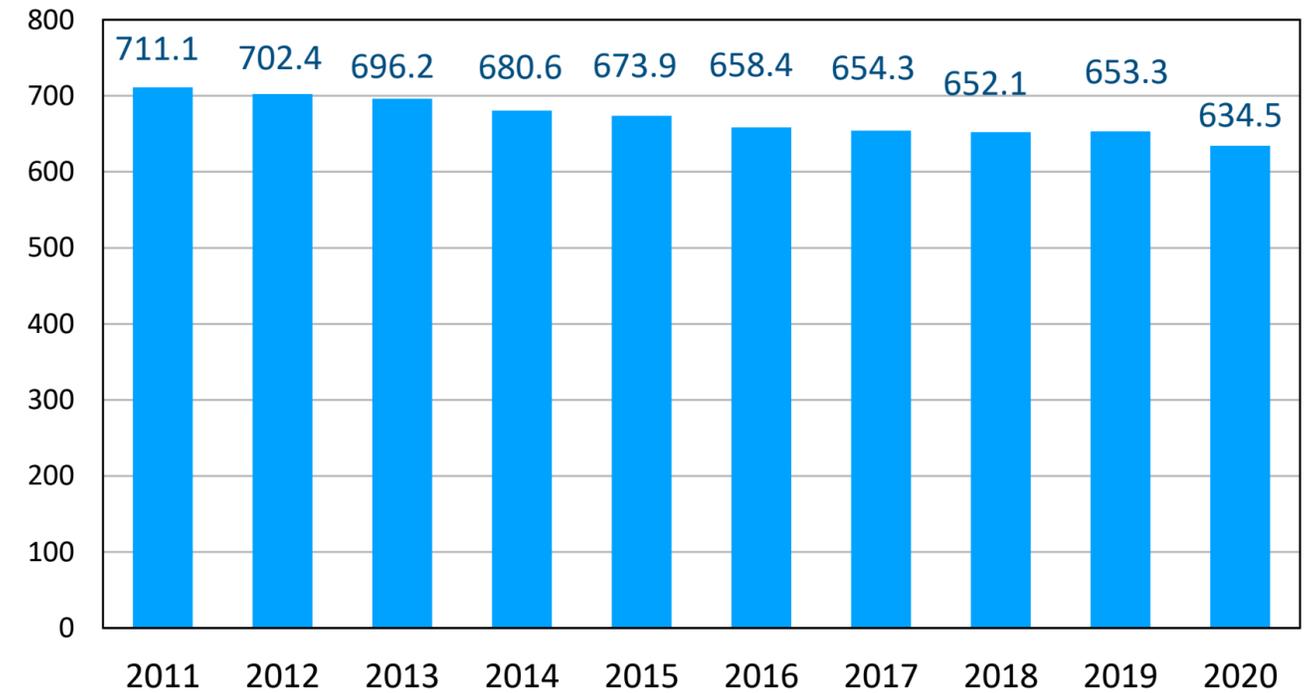
[Major Initiatives]

- The "Gifu Eat Up Movement" registers and publicizes restaurants and lodging facilities that are making efforts to reduce food leftovers by adjusting the amount of food, introducing smaller portions, and offering take-out options.
- The registration system for "Gifu Plastic Waste Reduction Model Shops" was established for restaurants and other establishments in Gifu Prefecture, and PR activities for restaurants and other establishments that practice initiatives to reduce single-use plastics were implemented.

[Indicators]

Item	Indicators	Status quo	Target value ("-"if not applicable)	Data source
General waste	General waste discharge	696 thousand tons (2018)	608 thousand tons (2025) 548 thousand tons (2030)	Gifu Prefecture Waste Management Policy Division, "The Third Gifu Prefecture Waste Disposal Plan"
	Amount of general waste recycled and recycling rate	162 thousand tons, 23.3% (2018)	170 thousand tons · 28% (2025) 159 thousand tons · 29% (2030)	Gifu Prefecture Waste Management Policy Division, "The Third Gifu Prefecture Waste Disposal Plan"
	Reduction through intermediate treatment of general waste	484 thousand tons (2018)	396 thousand tons (2025) 352 thousand tons (2030)	Gifu Prefecture Waste Management Policy Division, "The Third Gifu Prefecture Waste Disposal Plan"
	Final disposal of general waste	50 thousand tons (2018)	42 thousand tons (2025) 37 thousand tons (2030)	Gifu Prefecture Waste Management Policy Division, "The Third Gifu Prefecture Waste Disposal Plan"
Waste Reduction	Amount of food loss (business)	23,681t (2019)	22,100t (2025) 20,900t (2030)	Gifu Prefecture Gifu Citizens Support Division, "Gifu Prefecture Food Loss Reduction Promotion Plan"
	Number of municipalities cooperating in the "Gifu Eat Up Movement"	28(2022)	42 (2025)	Gifu Prefecture Waste Management Policy Division, "The Third Gifu Prefecture Waste Disposal Plan"
	Number of businesses and stores cooperating in the "Gifu Eat Up Movement"	1,223 (2022)	1,500 (2030)	Gifu Prefecture Gifu Citizens Support Division, "Gifu Prefecture Food Loss Reduction Promotion Plan"
	Number of registered businesses and stores in Gifu Prefecture as "Plastics Smart"	1,055 (2022)	1,500 (2025)	Gifu Prefecture Waste Management Policy Division, "The Third Gifu Prefecture Waste Disposal Plan"

<General waste discharge: 1,000 tons>



Source: Gifu Prefecture General Waste Disposal Survey

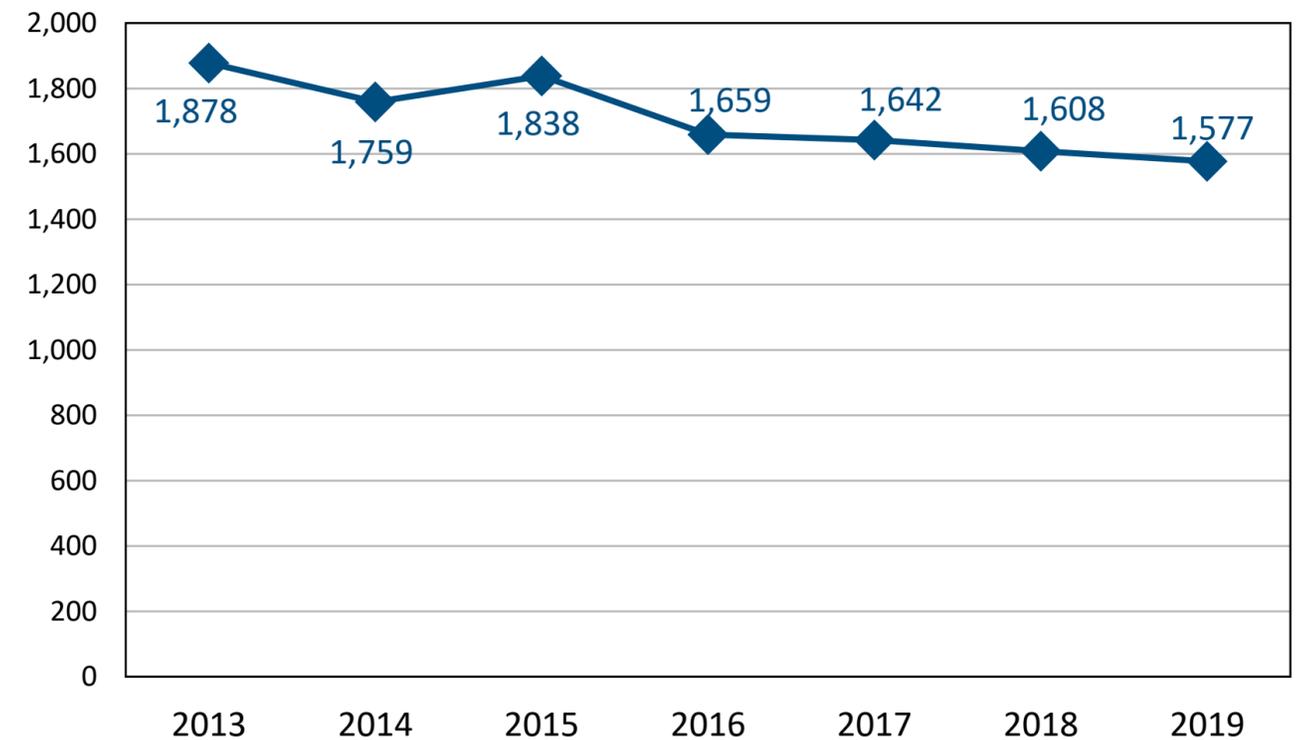
Since the indicators above are not tourism-specific, we will consider monitoring initiatives to reduce waste and food loss in the tourism sector in the mid- to long-term taking into account existing initiatives, such as the ones listed above.

[Issues]

- Global warming is a challenge common to the world. In 2020, Gifu Prefecture announced its aim to actualize a "Decarbonized Society Gifu" with virtually zero greenhouse gas emissions by 2050, and in 2021, Gifu Prefecture enacted the "Gifu Prefecture Basic Ordinance on Global Warming Prevention and Climate Change Adaptation" to promote "mitigation measures" such as reducing greenhouse gas emissions and "adaptation measures" to prevent or reduce damage caused by climate change.
- In 2023, Gifu Prefecture set the goal of reducing emissions in FY2030 by 48% from the FY 2013 level, and furthermore, to continue to take on the challenge of achieving the goal of 50%.
- The increase in temperature and natural disasters are threatening to reduce the haul of ayu fish, a symbol of "clear waters," and to affect agricultural crops.

[Major Initiatives]

- The program includes holding seminars for businesses on reducing greenhouse gas emissions, dispatching experts, and supporting the introduction of solar power generation equipment, etc.
- Establishment of the Gifu Climate Change Adaptation Center to conduct joint research, human resource development, and information dissemination based on regional needs.
- Promote and educate prefectural residents about the shift to a new low-carbon lifestyle, as well as provide opportunities to learn about global warming and conservation of the natural environment.

<Greenhouse gas emissions: 10,000 t-CO₂>

Source: Gifu Prefecture, Decarbonized Society Promotion Division

[Indicators]

Item	Indicators	Status quo	Target value ("-"if not applicable)	Data source
Mitigation	Total annual greenhouse gas emissions	13.85 million tons of CO2 equivalent (2019)	9.8 million tons of CO2 equivalent (2030)	Gifu Prefecture Decarbonized Society Promotion Division, "Gifu Prefecture Global Warming Prevention and Climate Change Adaptation Plan"
	Total annual greenhouse gas emissions in "Accommodation and food services" (preliminary results only)	0.41 million tons of CO2 equivalent (2019)	—	Gifu Prefecture Decarbonized Society Promotion Division, "Gifu Prefecture Global Warming Prevention and Climate Change Adaptation Plan"
Adaptation	Number of registrations of agricultural product varieties newly bred by the prefecture (improvement of agricultural product varieties adapted to climate change, etc.) (cumulative total)	unmeasured	10 (2025)	Gifu Prefecture Agricultural Policy Division, "Gifu Basic Plan for Agriculture and Rural Areas"

In the mid- to long-term, monitoring efforts to reduce greenhouse gas emissions in the tourism sector will be considered and experiences from INSTO Members and UNWTO will be taken into account.

4.13. Conservation of Natural Environment

[Issues]

- Gifu Prefecture has 81% of its land covered by forests, and two national parks, two national quasi-national parks, 15 prefectural natural parks, and 16 (2,957 ha) natural landscape protection areas have been registered or designated. A total of 223 natural monuments have been designated by the national and prefectural governments, the most in Japan. On the other hand, there are issues such as forests that have fallen into disrepair due to lack of proper management and increasing damage to crops caused by wild birds and animals.
- Securing financial resources is essential for the preservation of the natural environment, and a mechanism for earning while coexisting with nature is required. The challenge is to revitalize outdoor leisure activities such as waterfall tours, skiing, and rafting that take advantage of the abundant nature, and to create programs and train guides for eco-tourism and green tourism.

[Major Initiatives]

- In accordance with the "100-Year Forest Development Plan," a sightseeing scenic forest, walking trails, rest facilities, etc. have been developed.
- Creation of eco-tours and experience programs that take advantage of the unique nature of Gifu Prefecture.
- Support for eco-tour groups and guide training
- Gifu Prefecture's forest and environment tax system is used to support the maintenance of mountains and forests, thinning of forests, measures against wild birds and beasts, river cleanups, and activities of NPOs and other organizations.
- Established the "Forest Service Industry Promotion Council" to utilize forest space in various fields such as tourism and education, and to revitalize mountain village areas.
- Ecosystem management in forests and satoyama, extermination of invasive alien species, protection of rare wildlife, etc. have been implemented.



Chubu-Sangaku National Park (Shin Hotaka Ropeway)



Hakusan National Park (Hakusan-Shirakawa-go White Road)

4.13. Conservation of Natural Environment

[Indicators]

Item	Indicators	Status quo	Target value ("-"if not applicable)	Data source
Conservation of the natural environment	Designated areas and acreage of nature conservation areas	16 areas, 2,957 ha (2019)	—	Gifu Prefecture Environment and Citizen Support Policy Division
	Total number of nationally and prefecturally designated natural monuments	28 (2022)	70 (2026)	Gifu Prefecture Cultural Heritage Division
	Number of holding biodiversity-related courses, etc.	247 (2021)	300 (2025)	Gifu Prefecture Environment and Citizen Support Policy Division, "The Sixth Gifu Prefecture Basic Environmental Plan"
	Number of efficient river cleanups through watershed cooperation	21 (2022)	total 100 (2026)	Gifu Prefecture River Management Division
	Area of environmental conservation forests maintained	1,713ha (2020)	2,100ha (2026)	Gifu Prefecture Forestry Utilization Promotion Division
Utilization of natural resources	Number of participants in experience programs at the Nagara River Ayu Park (cumulative total)	19,342 (2018)	100,000 (Cumulative total for 2019-2023)	Gifu Prefecture Satokawa Promotion Division, "GIAHS Conservation Plan"
	GIAHS "Ayu of Nagara River" Players Registration Organization	88 (2018)	100 (2023)	Gifu Prefecture Satokawa Promotion Division, "GIAHS Conservation Plan"
	Number of forest service industry entrepreneurs (cumulative total)	0 (2020)	20 (2026)	Gifu Prefecture Forestry Utilization Promotion Division
Green tourism	Number of people experiencing agriculture, forestry, and fishery	214,000 (2019)	300,000 (2025)	Gifu Prefecture Rural Development Division



Osaka Waterfall Tour

Acronyms & Abbreviations

UNWTO	United Nations World Tourism Organization
INSTO	The UNWTO International Network of Sustainable Tourism Observatories
SDGs	Sustainable Development Goals
DMO	Destination Management / Marketing Organization
GSTC-D	Global Sustainable Tourism Criteria for Destinations
JSTS-D	Japan Sustainable Tourism Standard for Destinations
GIAHS	Globally Important Agricultural Heritage Systems
FAO	Food and Agriculture Organization of the United Nations
UNESCO	United Nations Educational, Scientific and Cultural Organization

Gifu Prefecture Sustainable Tourism Observatory
Preliminary Study Report

Gifu Prefecture
september 2023

SUSTAINABLE DEVELOPMENT GOALS

