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# ASEAN

## Survey Report

### on Sustainable Tourism for Young People

#### (Digest version)

February 2023

Survey Conducted by  
REGION Inc.

I	Purpose · Outline of Survey	Page 3
II	Survey Content (questions)	Page 4
III	Survey Results including comments from roundtable discussions which were held four times with different members	Page 6

# I Purpose · Outline of Survey

Overview	<p>This survey has been conducted by the ASEAN-Japan Centre, an international organization, as part of its research work on sustainable tourism targeting young people. Japanese “Gen Z” and “Millennials” aged 15-35 who like to travel or are interested in travel are surveyed on their travel experiences to the 10 ASEAN Member States, their willingness to travel in the future, and their awareness of sustainable tourism from various perspectives. *The survey was conducted in Japanese language. This report is a translation of the survey report in Japanese.</p>
Purpose	<p>The survey targeted Japanese Gen Z and Millennials aged 15-35 who like to travel or are interested in travel to find out their sensitivity to keywords such as "SDGs" and "sustainable tourism," their awareness of being responsible travelers, and their interest in Southeast Asian tourism. The use of social media was also investigated as a reference for promotion to younger generations in Japan.</p>
Methodology	<p>Male and female survey monitors aged 15-35 registered at <i>Rakuten Insight</i> were screened on the question, “Do you like or are interested in traveling, whether overseas or domestically?” A total of 1,000 respondents, 555 of whom answered "very much" and 445 of whom answered "fairly much," responded to 48 questions.</p>
Period Covered	<p>Four days, from Dec. 16 (Fri.) ~Dec. 19 (Mon.), 2022</p>
Survey Target	<p>Combined total 1,000 Japanese males and females, aged 15-35 who like to travel or are interested in traveling, whether overseas or domestically. *Survey of people who like to travel or are interested in traveling; gender is predominantly female and age is not evenly distributed.</p>

# II Questions-1

Includes questions which are not in this digest version.

### Screening Survey

Question type	Question No.	Question	Remarks
SA	SC1	Do you like to travel or are you interested in traveling, both domestically and internationally? Please choose one that applies to you.	

### <Basic Information>

Question type	Question No.	Question	Remarks
SA	Q1	Please indicate your gender	
SA	Q2	Please indicate your occupation	
SA	Q3	Is your profession related to any of the following fields? (If you are a student, please select any related fields in your major.)	
SA	Q4	Do you have any overseas travel experience?	
SA	Q5	In what way have you traveled abroad? Please select one item that applies to your most recent trip abroad.	
SA	Q6	On your most recent trip abroad, what were the deciding factors in your choice of destination? Please choose one that applies.	
MA	Q7	Have you ever been to any ASEAN-member countries? Please indicate all countries you have visited (as many as you like).	
SA	Q8	Do you want to travel overseas in the future?	
SA	Q9	How would you like to travel abroad? Please choose the one that best fits your needs.	
MA	Q10	Please select up to 3 ASEAN-member countries you would like to visit. (Up to 3)	
MA	Q11	Please select up to three images below that come to mind when you think of tourism in ASEAN. (or choose about what you would like to experience) (Up to 3)	
SA	Q12	What information sources and information gathering tools do you use most frequently?	
SA	Q13	Which social media do you use most often as a source of information on overseas travel?	

### <Attitudes Toward Sustainable Tourism>

Question type	Question No.	Question	Remarks
SA	Q14	Are you familiar with the term SDGs?	
SA	Q15	Are you familiar with the word "sustainable"?	
SA	Q16	Are SDGs and sustainability part of your daily life?	
SA	Q17	Have you ever considered the SDGs or sustainability when traveling?	
SA	Q18	Have you ever chosen a sightseeing spot or facility that is conscious of SDGs and sustainability when traveling?	
MA	Q19	What criteria do you use to select sustainable tourism destinations and facilities? Please select all that apply. (Any number of answers)	
SA	Q20	Accommodation booking sites such as Booking.com and Rakuten Travel allow you to narrow down your search for accommodations that are involved in sustainable initiatives. Did you know about these initiatives? Booking.com: <a href="https://partner.booking.com/ja/travel-sustainable">https://partner.booking.com/ja/travel-sustainable</a> Rakuten Travel: <a href="https://travel.rakuten.co.jp/mytrip/news/2022-11-21">https://travel.rakuten.co.jp/mytrip/news/2022-11-21</a>	
SA	Q21	Have you ever actually searched for or reserved accommodations using these search criteria?	
SA	Q22	Have you ever heard of sustainable tourism?	
MT	Q23	The following three initiatives are needed for sustainable tourism. Which of the following is your opinion on each? Reference from UNWTO: "Definition of Sustainable Tourism" <a href="https://unwto-ap.org/why/tourism-definition/">https://unwto-ap.org/why/tourism-definition/</a>	

### <Awareness as a Responsible Traveler>

Question type	Question No.	Question	Remarks
SA	Q24	Do you want to ensure that the local businesses you visit for tourism (e.g., farmers, community-based lodging facilities, souvenir manufacturers, etc.) will benefit from your visit?	
SA	Q25	If your visit could contribute in some way to the sustainability of the area you are visiting, would you be willing to get involved?	
SA	Q26	For example, if there are two optional tours that cost the same 5,000 yen and have almost the same content, and one specifically states that it is "committed to sustainable practices such as preserving nature, benefiting the local community, and reducing CO2 emissions," which one is closer to your idea?	
SA	Q27	If an optional tour with sustainable practices is priced higher than a tour with the same content that does not, which of the following is closest to your opinion?	
SA	Q28	How much difference would you be willing to pay per person?	

# II Questions-2

## <ASEAN's Attitudes Toward Sustainable Tourism>

Question type	Question No.	Question	Remarks
MA	Q29	Which ASEAN-member countries seem to be focusing on sustainable tourism? Please select up to three. (Choose up to 3)	
SA	Q31	Did you know that this initiative has been covered in the news and newspaper articles?	
SA	Q32	What do you think about the efforts to ban tourists from entering an area for three and a half years? Please choose the one that most closely matches your opinion.	
SA	Q33	Have you ever heard the term "overtourism"?	
SA	Q34	Overtourism is a phenomenon in which an increase in the number of tourists visiting a tourist destination has a negative impact on the lives of residents and the natural environment. Which of the following statements is closest to your own idea about taking measures to mitigate overtourism, such as limiting the time and number of visitors to protect the environment, even if it causes some inconvenience to tourists, as in the case of Phi Phi Island?	
SA	Q35	In order to avoid overtourism and reduce congestion, some museums around the world and in Japan have begun to require advance reservations for ticket sales, and some tourist facilities are now using SNS to provide real-time information on congestion. Which of the following statements is closest to your own view on these initiatives?	
SA	Q36	This program has been incorporated into educational tours in Japan, but did you know that this kind of program exists?	
SA	Q37	Would you be willing to participate in this program?	
SA	Q38	There are many programs in other ASEAN countries that allow tourists to contribute to local development through tourism, such as the Homestay Program. Would you like to learn more about such programs?	
SA	Q39	What do you think about this resort?	
SA	Q40	How much does NIHI Sumba's contribution to local employment and healthcare influence your choice of lodging when compared to resorts with roughly comparable prices, services, and ambiance?	
SA	Q41	What do you think about this farm?	
SA	Q42	How much does this tourism program's contribution to sustaining local agriculture influence your choice when compared to programs of similar value, content, etc.?	

## <Questions about ASEAN and ASEAN-Japan Centre Initiatives>

Question type	Question No.	Question	Remarks
SA	Q43	There are many other sustainable tourism initiatives in the 10 ASEAN countries. Are you interested in such initiatives?	
MA	Q44	What media or channels do you think would be the best way to obtain information about such sustainable tourism initiatives? (Please choose as many as you like)	
SA	Q45	Does knowing about such sustainable tourism initiatives influence your decision on your next travel destination?	
SA	Q46	To learn more about sustainable tourism initiatives in the 10 ASEAN countries through social media, which of the following sources do you think would be helpful? Please choose the one that best applies to you.	
SA	Q47	The ASEAN-Japan Centre operates a tourism information website on Southeast Asia called ASEAN Travel ( <a href="https://travel.asean.or.jp">https://travel.asean.or.jp</a> ). Have you ever seen this site? *Please be sure to click on the URL above before answering.	
SA	Q48	ASEAN-Japan Centre has an official Instagram tourism account (@aseanjapancentre, <a href="https://www.instagram.com/aseanjapancentre/">https://www.instagram.com/aseanjapancentre/</a> ). Have you seen our posts? *Please be sure to click on the URL above before answering.	
SA	SEX	Gender	
No.	AGE	Age	
SA	CHIIKI	Residence	
SA	NAGE	Age	
SA	NSEXNAGE	Gender and Age	

# III Survey Results

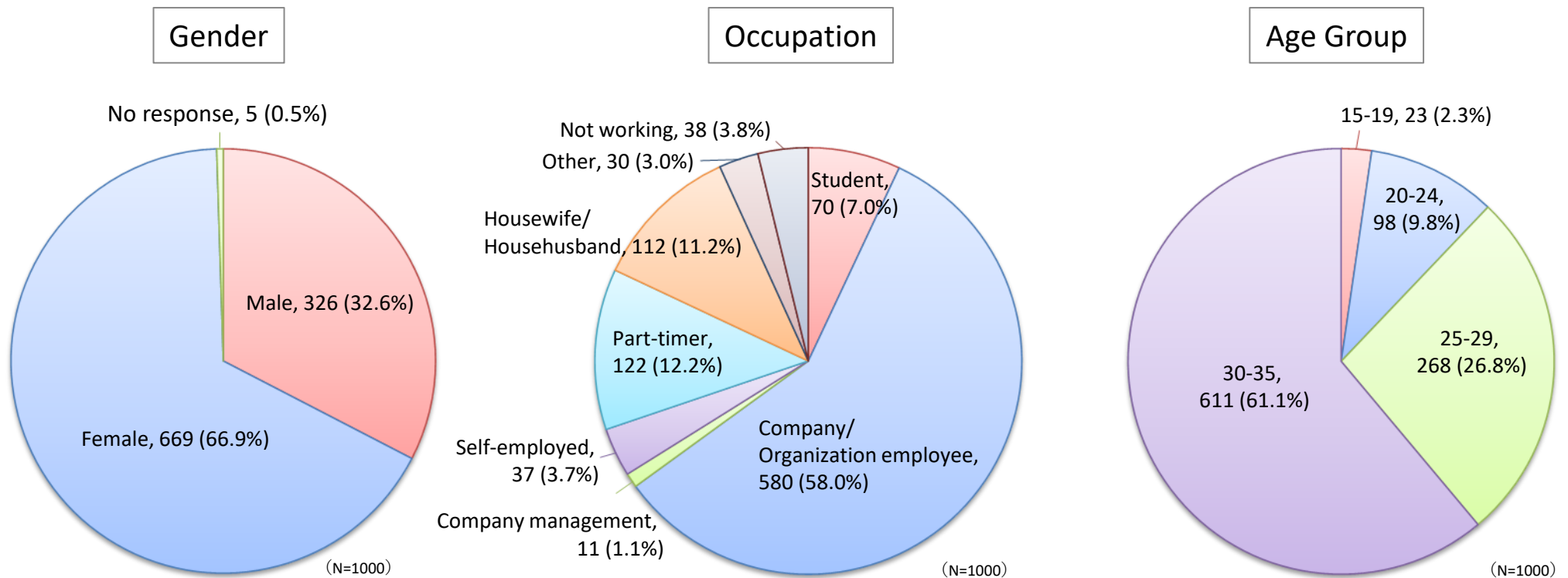
## 1. Screen Survey

The majority of respondents were female (nearly 70%), and the age group "30-35" accounted for the highest percentage at approximately 60%, followed by those "25-29" at nearly 30%.

A total of 1,000 respondents, 555 of whom answered "very much" and 445 of whom answered "somewhat" to the question: "Do you like or are interested in traveling, whether overseas or domestically? The proportion of female reached nearly 70%, while male topped 30%. By occupation, those working for companies and organizations accounted for the largest proportion at approximately 60%. By age group, those in their "30-35" was the largest, accounting for approximately 60%, followed by the "25-29" age group, which was the second largest, making up nearly 30%.

\*This survey was conducted among those who like to travel or are interested in traveling. Gender is predominantly female, with ages not evenly distributed.

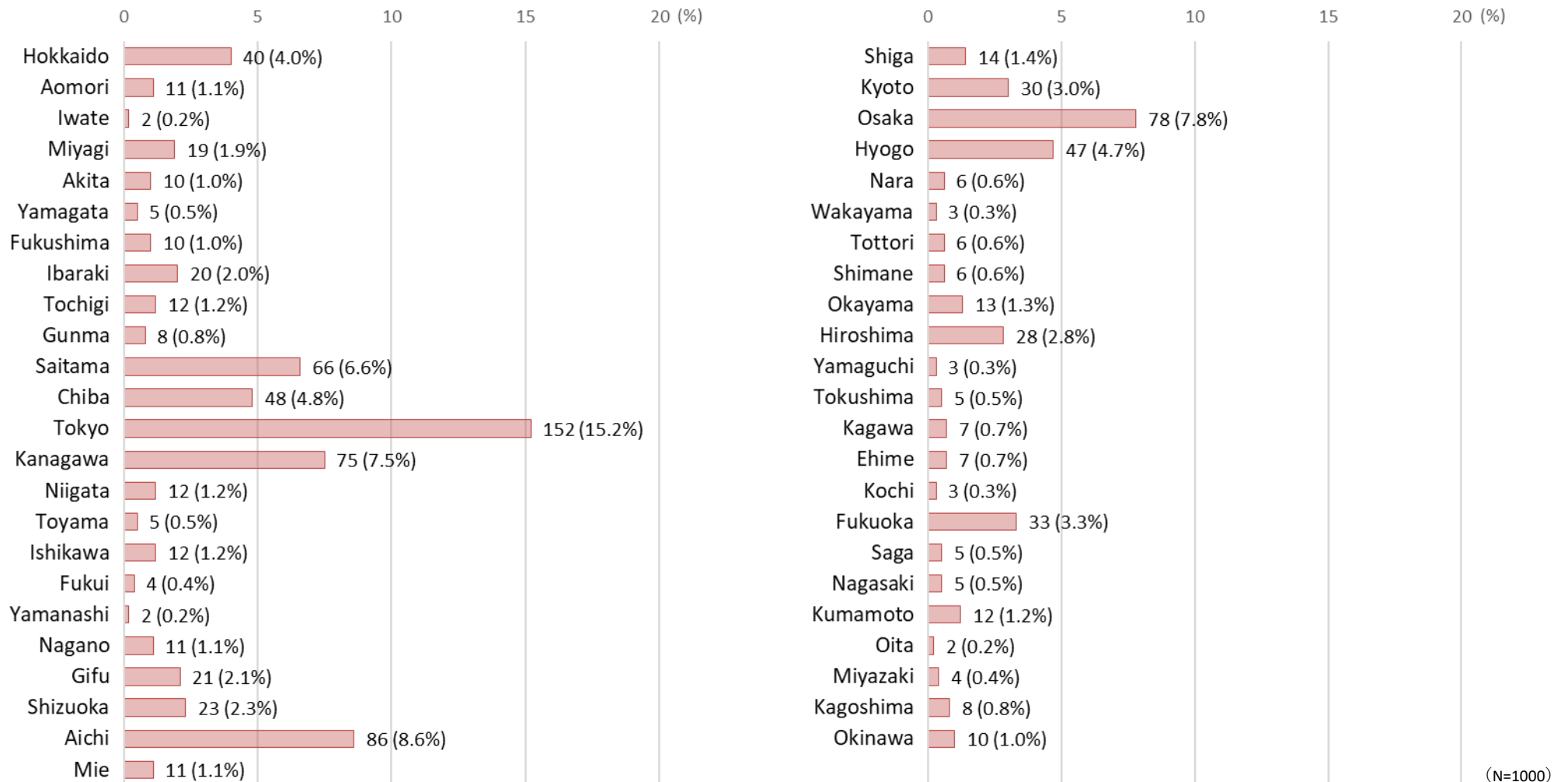
## 2. Basic Attributes



# III Survey Results

## 1. Screening Survey

Survey respondents were residents of various regions of Japan. In proportion to the ratio of Japan's population, many respondents tended to be residents of large cities and prefectures such as Tokyo, Kanagawa, Aichi, Osaka and Hyogo.

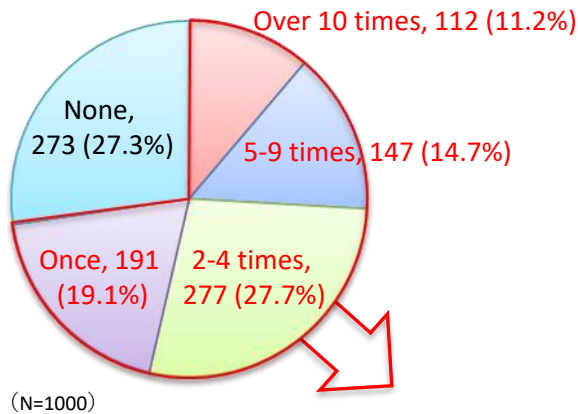


## 3. Overseas Travel Experience

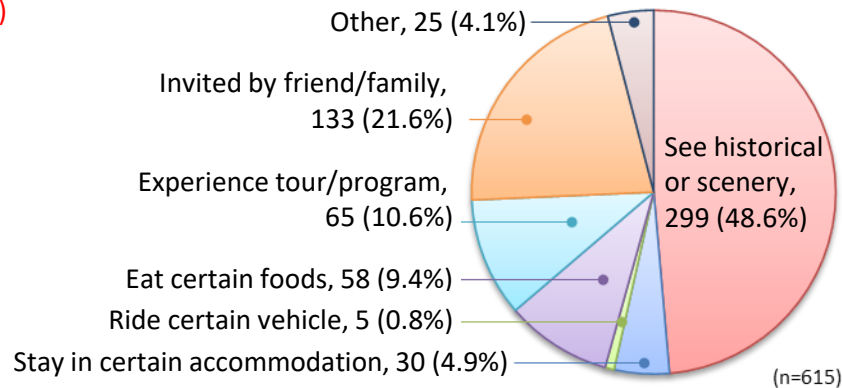
About seven in 10 respondents have traveled abroad, with 80% traveling recently, were for sightseeing purposes

About 70% of the respondents had traveled overseas, and the most common frequency was "2 to 4 times," accounting for about 30%. About 80% of recent overseas trips were for sightseeing, with the most common "deciding factor" for the destination was "scenery or historic sites I wanted to see," at about 50%, followed by "because I was invited but by a friend or family member," at about 20%.

Overseas Travel Experience



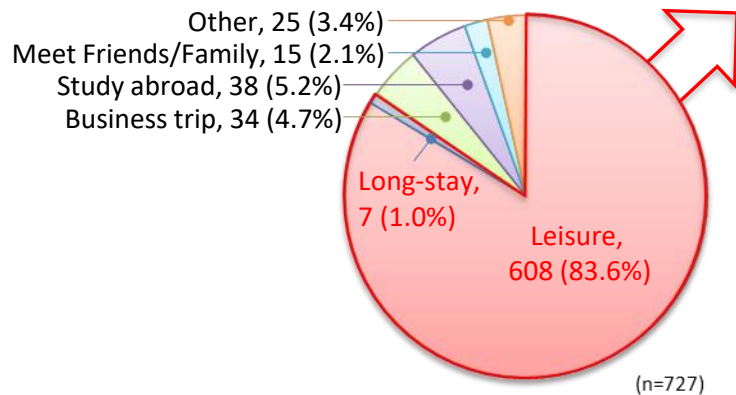
"Deciding Factor" in Choosing Destination



Other 25 Comments

- Shopping
- Like the country
- For some unknown reason
- Just wanted to go there
- Wanted to go to a theme park
- Experience a different culture
- Experience the sea
- Accompany a mentor
- For the experience
- Work
- Company trip (2 responses)
- School trips (3 responses)
- School trip, company trip
- Honeymoon
- Wedding and honeymoon
- Visit home of my favorite sports team
- University event
- Salute the new year abroad
- If air tickets with a convenient schedule and price range
- Enjoy country where people are nice to Japanese
- Relatively cheap to travel
- Cosmetic treatment purpose

Reasons for Recent Overseas Trips





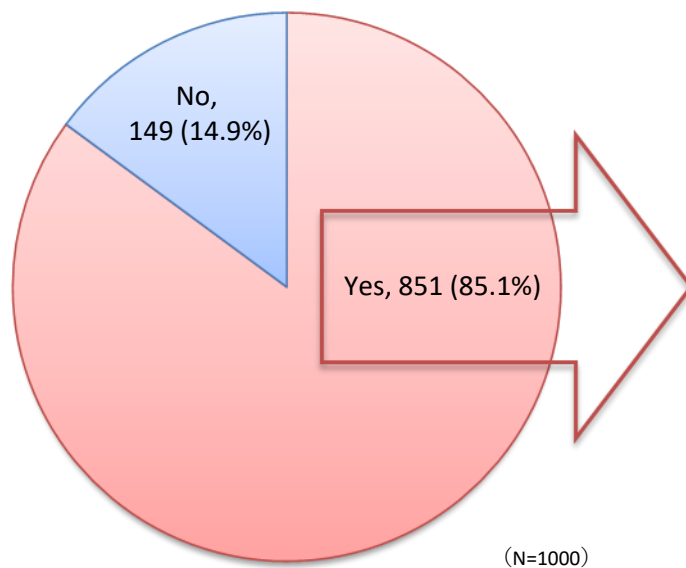
# III Survey Results

## 3. Overseas Travel Experience

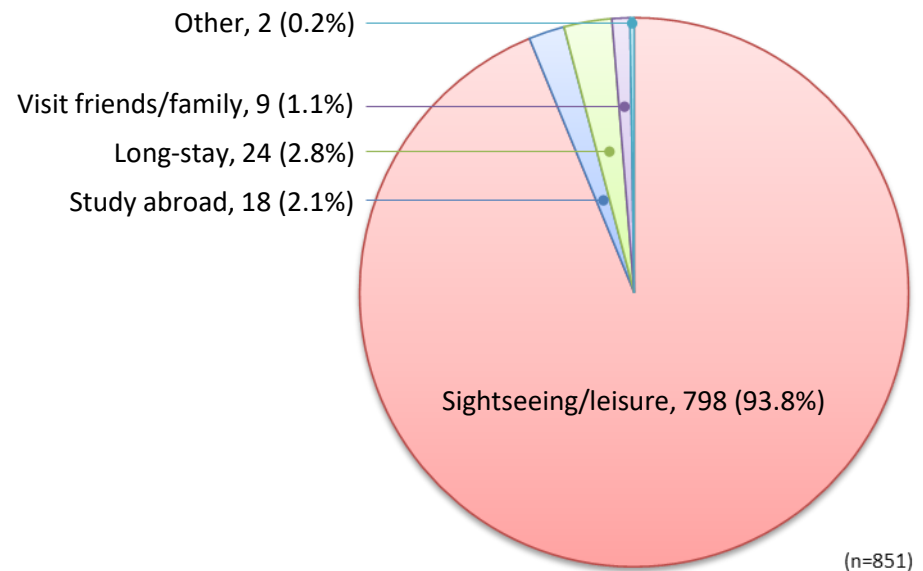
**85% of respondents are willing to travel abroad in the future, and of which 94% of them would like to travel for sightseeing**

Some 85% of respondents are willing to travel overseas in the future, and 94% of them would like to travel for sightseeing. Asked if they would like to travel abroad in the future, 85% responded "yes," indicating a high level of willingness. Queried about the main reason they would like to travel abroad, 94% of the respondents answered for sightseeing/leisure.

Do You Want to Travel Overseas in the Future?



What is the Main Reason for Traveling Overseas?



# III Survey Results

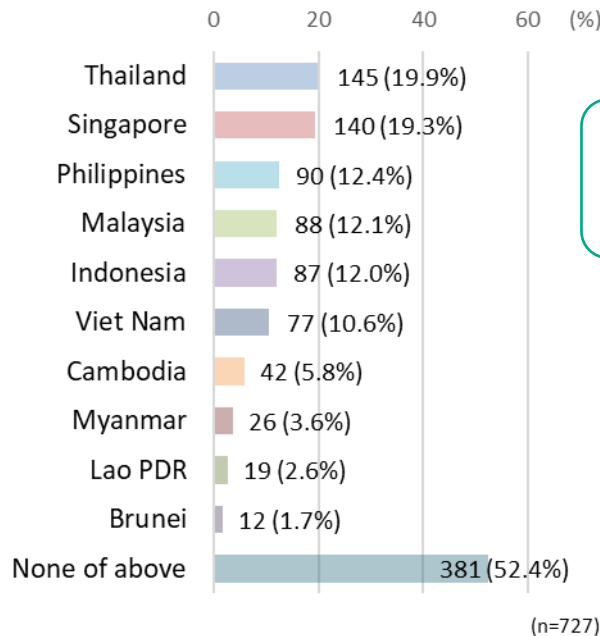
Roundtable Discussion P. 12

## 4. Traveling to ASEAN Member States

### Nearly Half of respondents have traveled to ASEAN Member States with Thailand leading as the country they have visited while Singapore is at the top for country they want to visit

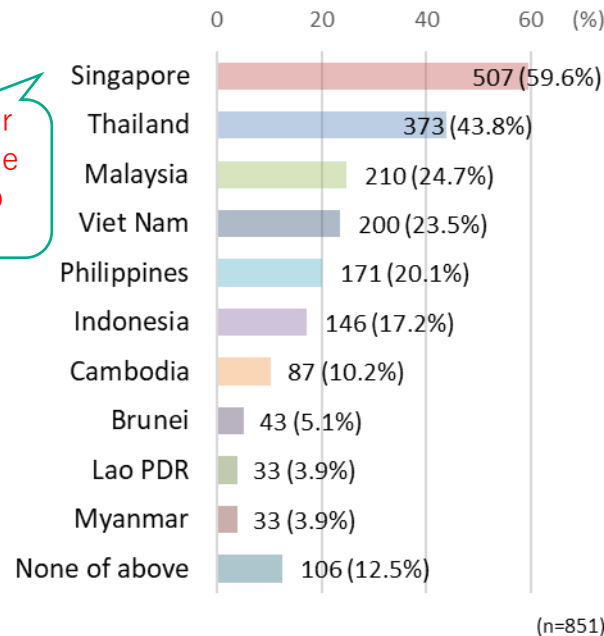
About half of the respondents have traveled to an ASEAN Member State. Thailand and Singapore were the most popular countries that respondents have visited, accounting for some 20% of all respondents. Singapore was the most popular ASEAN member country that respondents would like to visit, at approximately 60%, followed by Thailand at over 40%. The most popular image of ASEAN tourism was "gourmet food" at approximately 60%, followed by "historical sites" at 40% then "resort hotels" at 30%.

Have you ever been to any of the ASEAN Member States? Please indicate all countries you have visited. (multiple answers)

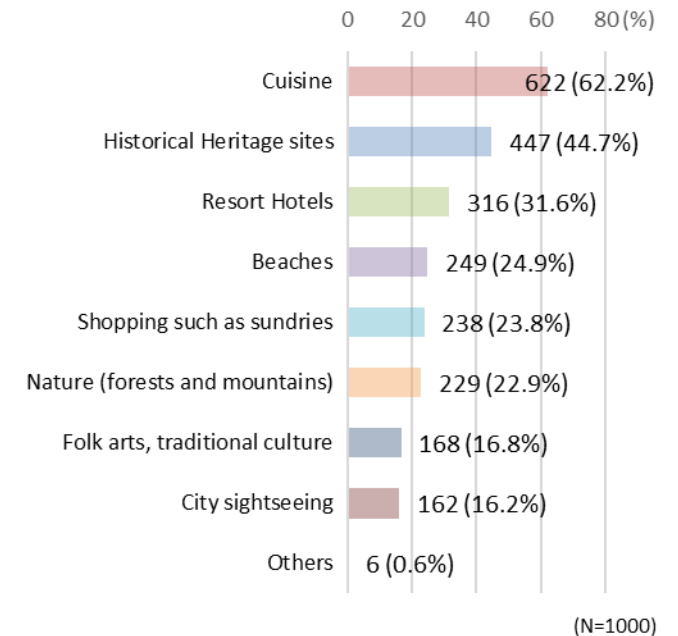


Gender and Age Group P. 11

Please select up to three ASEAN Member States you would like to visit (multiple answers).



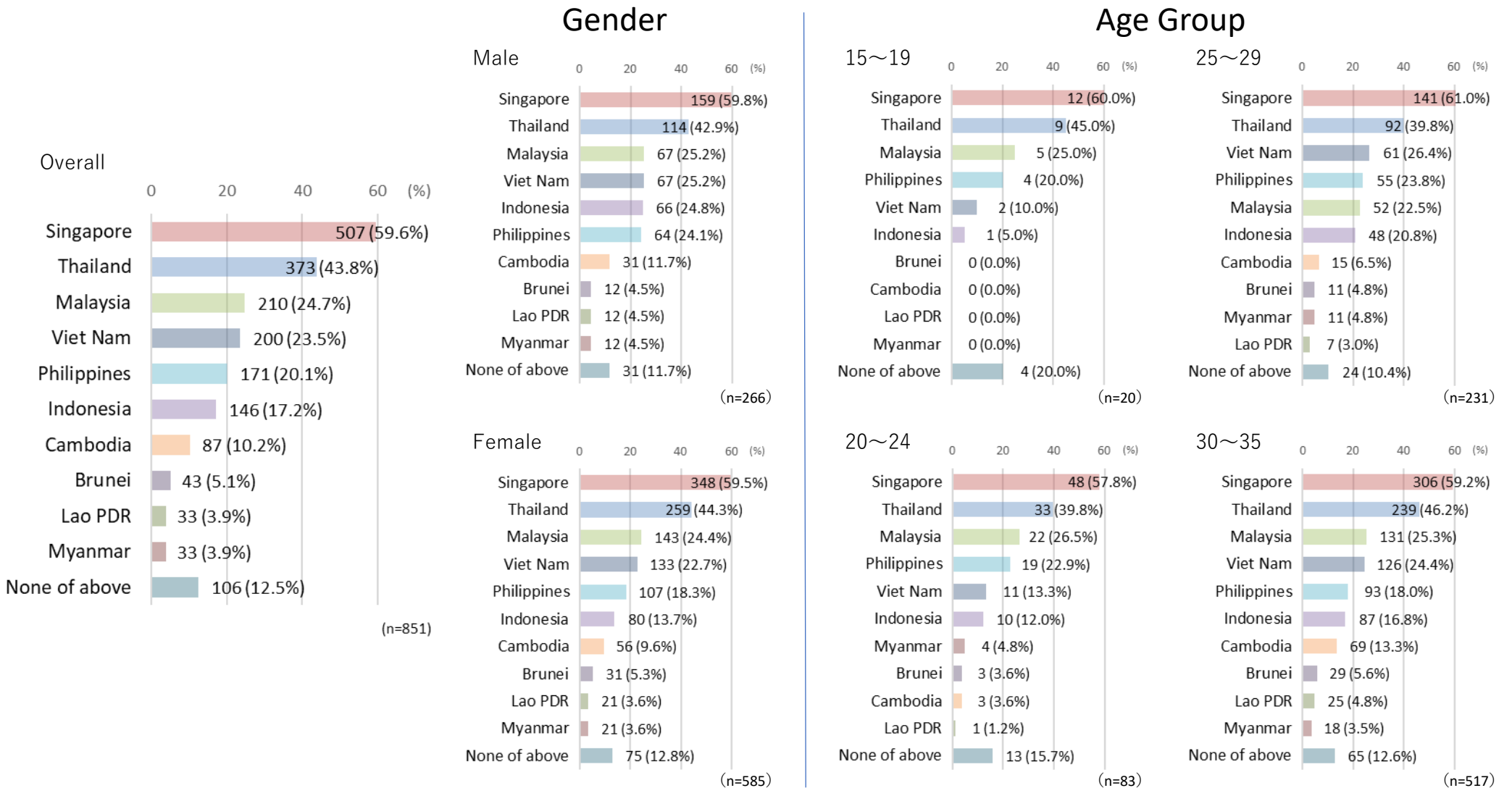
Please select up to three images that come to mind when you think of tourism in ASEAN. (Multiple answers)



# III Survey Results

Gender and Age Group: Select up to three among ASEAN Member States that you would like to visit (Multiple answers)

By gender, there is no difference in the ranking of countries, with Thailand, Malaysia and Viet Nam following Singapore in popularity. No significant gap is seen in the order of popularity by age groups either, with some 60% of all age groups selecting Singapore.



## Roundtable Discussion: Images That Come to Mind About ASEAN

### ●20s Age Group

#### **Afraid? No English Understood? Biased Image of Security and Hygiene**

- I would like to go, but I am scared because I have no experience of traveling abroad. When I think about whether I really want to go, the possibility of going is low. I am afraid of security and pickpockets. If something happens, I don't think I could do anything by myself. I am not confident about my language skills, so I am afraid if something were to happen. I often hear people say that they are afraid of getting an upset stomach in Asia, and that scares me.

- I have an image that Southeast Asia is not safe and the air quality is poor, so I am hesitant to visit there. I am also concerned about sanitation. A YouTuber talked about his trip to Thailand, and heard that the water was contaminated and dead animals were floating in the river.

- When I talk to friends about where to go overseas, I probably would not choose ASEAN as my first destination. When I talk about where to go for my graduation trip with friends in the tourism department, we usually talk about Europe. ASEAN is easy to visit because of its proximity, but I do not know about the security.

#### **Some Say the Image They Receive is Powerful and Energetic**

- There is an image that it is the midst of development. When I went to Viet Nam, I didn't feel it was very poor, yet it had an image of not being very developed. In Thailand, when I hear from friends, I have a strong image that Japanese convenience stores are entering the market, with more development continuing.

- The first image is that of multi-ethnicity, with a vibrant mix of religions. There is a difference between urban and rural areas, and that it has an image of rising development.

- There is the image of its rice being very delicious. I usually eat out and often go to Thai restaurants.

- It has an image of rapid development and high energy. There's great possibility as a market. If something impactful happens, it'll spread with great momentum.

#### **Resorts and Poverty, Fragmented and One-sided. The Images of ASEAN are Poor, Probably Due to Lack of Information**

- If you think about why you have never been there before, is it still because there is little information and knowledge available? There is information if you look for it. But if you live life as is, there is more readily available information to know about the U.S. and Europe through TV, etc.

- I want to go to Singapore after job hunting, where the scenery is Instagrammable. I want to go to Jewel Changi Airport because it's attractive.

### ●30s Age Group

#### **Countries with Remarkable Economic Development and Rising Momentum to Overtake Japan. Sense of Crisis in the Image of Japan as No. 1 in Asia**

- Thinking of ASEAN as Southeast Asia, I often talk with people who travel with me about how it is really no different from Japan, but rather more economically developed than Japan.

- There is an information gap of Southeast Asia in Japan, and I was strongly aware that there are still many people who think Southeast Asia is below Japan.

- I went to Southeast Asia for the first time nearly 10 years ago. It's not scary, but chaotic, inexpensive, foreign in a good way. It's cross-cultural, and the image of being extraordinary was strong. But recently the economy has developed so much, and every time I go, I remember feeling that it has more earning power than Japan or that Japan could be left behind.

- It is scary that our parents' generation says "Japan is No. 1 in Asia." But I am afraid that some Japanese do not understand that they will be left behind. I think the reason why there are those who think that Japan is No. 1 forever is that there are fewer people who travel, and those who cannot objectively view Japan. It can't be helped, but the amount of information about ASEAN is lacking.

- When I heard about ASEAN, it was at school. When it comes to Southeast Asia, the information comes in frequently.

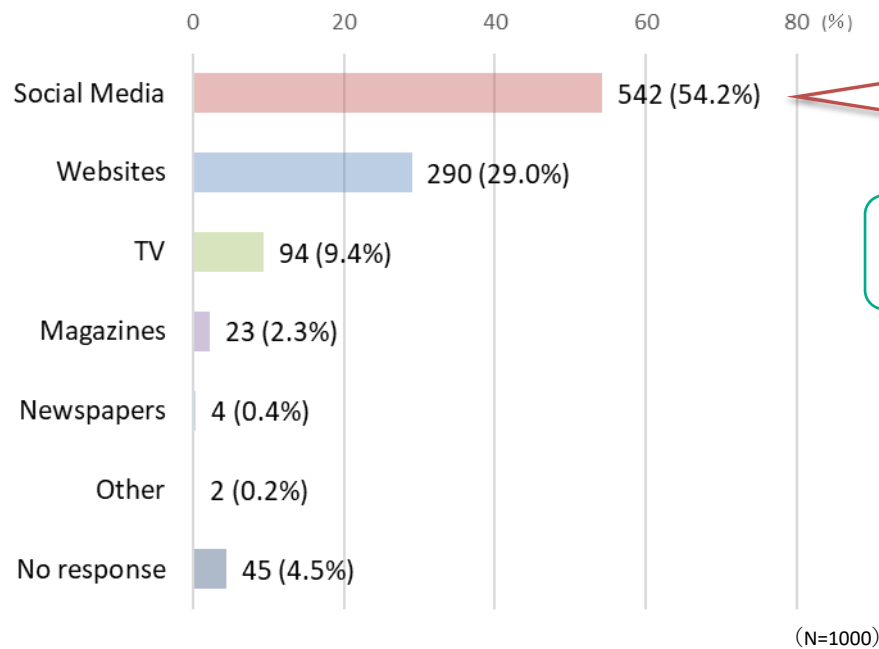
# III Survey Results

## 5. Obtaining Information

**Instagram is the most often used social media as a source of information for international travel, used by more than 60% of respondents**

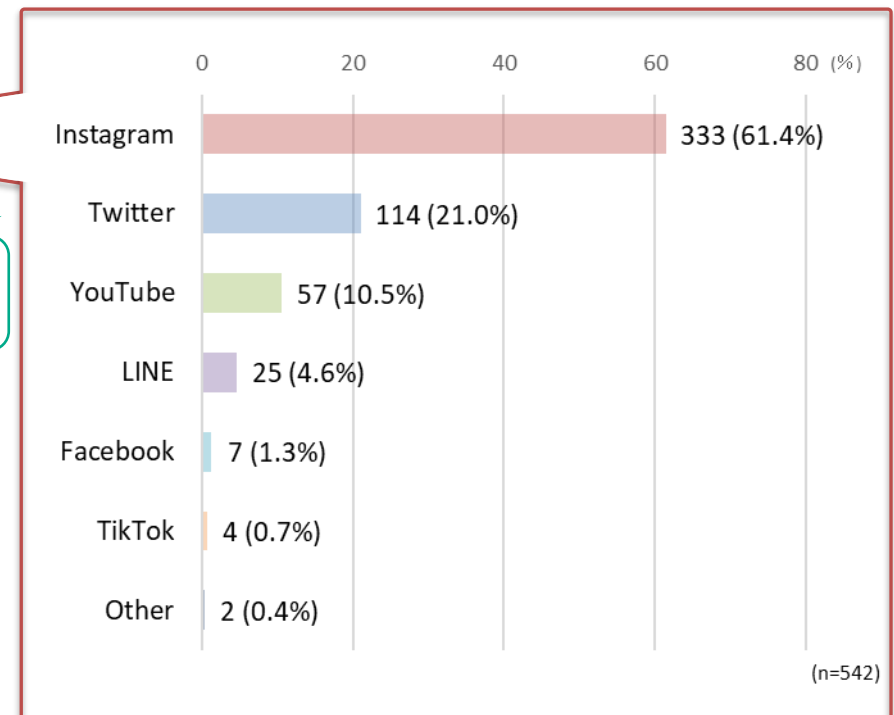
Social media is the most often used information source or information-gathering tool -- generating a ratio of more than 50% of the responses, followed by websites at around 30%, and with TV at 10%. Instagram is the most often used social media as a source of information on outbound travel, making up more than six in 10 of the respondents, a large margin over Twitter, which came in second with some 20% of the respondents. Instagram is a highly influential source of information on overseas travel for young people aged 15-35.

What information sources or information-gathering tools do you use most often?



Roundtable Discussion, P. 14

Which social media do you use most often to gather information about overseas travel? Please choose one.



## Roundtable Discussion: Information Gathering

### ●20s Age Group

**Instagram along with TikTok are the main sources of gathering information. TV and guidebooks are also first points of contact for travel destinations.**

- Instagram is my main source of information, but I also use TikTok from time to time. When I went to the U.S., I used Google Maps to find restaurants and it came up with a lot of information, and from there I could jump to personal websites.

- I don't buy guidebooks these days, but when I travel in Japan, I often go to roadside stations and get information from paper guides.

- Instagram and websites are mainly used, but I also use guidebooks quite a bit. Instagram and websites only show things that I am interested in or that I have researched, but guidebooks reveal places that I have never heard of or places that I am not that interested then but may become in the future.

- It's about 50/50 between Instagram and websites. Instagram has a lot of personal posts. I don't know all details, so I check the web to see how to get there.

- I often start by watching TV such as a program called "*Tabi Salad*" at home. Not only travel programs, but also variety shows are often good sources about places I want to visit.

- The main ones are Instagram and twitter. It is easy to notice when there's a buzz on twitter; makes me want to go to the places posted. The second is word-of-mouth from friends, which is quite important. Third is *manga*. Since I like reading *manga*, I want to go to the "sacred places" that appear in them.

**Social networking sites are used to decide on places and to find out about local conditions and visuals on TikTok and YouTube are heavily weighted.**

- I follow YouTube channels that showcase the destinations' food, scenery and activities. The search and recommendation displays are full of related posts. I check them and save the ones that look interesting, delicious or beautiful.

First, if I like a tourist attraction that comes across on TikTok, I like then save it. Next, I search on Instagram to see what kind of scenery is there, and finally, I watch YouTube to see how to get there. YouTube shows all the procedures. I also watched the procedures for my trip to South Korea on YouTube. I do not read guidebooks at all.

I look at vlogs (channels of people who like to travel, etc.) to see how to get there, how long it takes, and how much it costs. I don't make exactly the same travel plan, and it's sad I have to know so many things before I go, but at least I know what the atmosphere is like.

### ●30s Age Group

**Twitter for real-time information, Instagram for filming locations, with web articles, guidebooks, novels and movies as other sources of information.**

- I search for real-time information first on twitter. In addition, since twitter followers are close to me, I ask for their recommendations of sightseeing spots.

- In my profession, Instagram is useful when searching for information on what can be photographed at a particular location. I often search for cafes and places I want to take pictures of.

- I'm not very interested in the information of sightseeing spots that appear on Instagram or twitter. The destination is decided from a conversation with a traveling companion. When you want deep information such as Wi-Fi, hotel status, and what kind of work can be done in that area, you can get more information for yourself by reading people's articles on the web.

- Twitter is where most of the primary information can be found, especially for travel: where the PCR tests are, whether you can enter a country, etc., and the unfiltered opinions, both good and bad.

- Instagram is used for places of interest or recent photo ops after reading guidebooks. I image-search twitter for tweets that have over 1,000 likes. Instagram and twitter are used to see how people are taking photos. TikTok is ideal for tips on what young kids are looking at.

- Sometimes I decide where to go based on movies or novels.

# III Survey Results

## 6. Sustainable Tourism-1 (Basic)

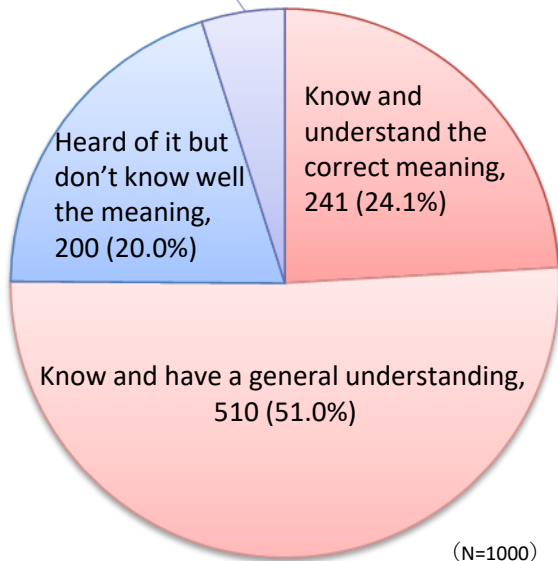
Roundtable Discussion, P. 16

**About 70% of respondents understand the meaning of "SDGs" and "sustainable," with some 60% aware of it in their daily lives**

We have surveyed the level of awareness of the meanings of the terms SDGs and sustainable, separately. About 50% of respondents answered "Yes, I have a general understanding of the meaning," while more than 20% answered "Yes, I understand the meaning correctly," for a total of about 70% who understand the meaning. The results show that the awareness of SDGs and the word "sustainable" are almost the same. About 60% of respondents say they are aware of the SDGs and sustainability in their daily lives -- more than half of the total-- indicating that many young people are conscious of sustainability in their daily lives.

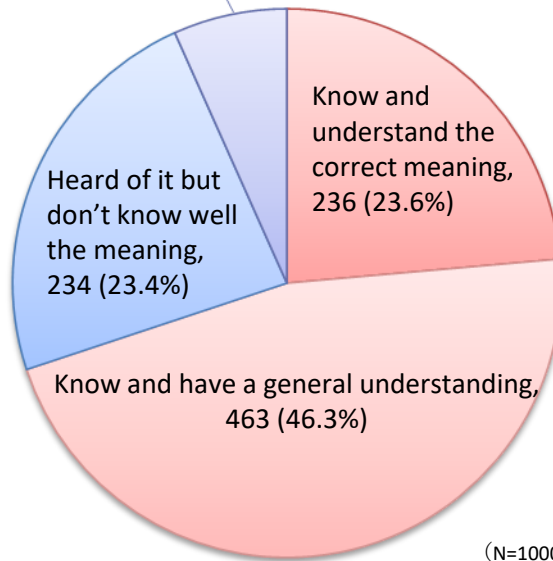
Are you familiar with the term SDGs?

Never heard nor don't know anything about it, 49 (4.9%)

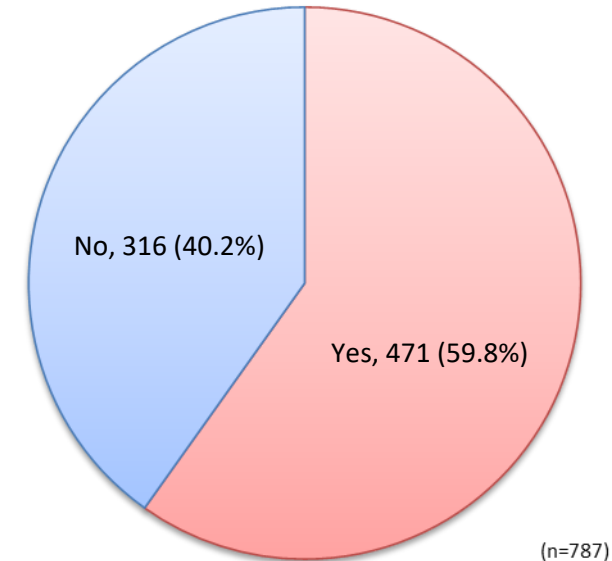


Is the word "sustainable" familiar to you?

Never heard nor don't know anything about it, 67 (6.7%)



Does your actions in daily life show awareness of the word "sustainable" and SDGs?



\*Only those who checked either "Yes, I know and understand the meaning correctly" or "Yes, I know and generally understand the meaning" to the questions "Do you know the term SDGs" and "Do you know the word sustainable"

## Roundtable Discussion: SDGs and Sustainability Awareness

### ●20s Age Group

**Through their part-time jobs, they developed a dispassionate perspective on corporate initiatives. They will choose if "beneficial to me and sustainable."**

- I wondered if it made sense for a certain coffee chain to have paper straws when their cups are plastic. My friend said, "It is definitely easier to drink from a paper cup with a plastic straw," and I agree. If the SDGs are really meaningful, I would like to be more conscious of them.

- I work part-time at a café and have opportunities to think about the SDGs through my job. Sometimes, however, the products are over-packaged to begin with, and I wonder "What?" I think there is so much plastic when I take out the trash. I sometimes feel sorry for the marine life in the ocean that is being polluted because of this.

- I am planning a trip to Okinawa, but when I look for a hotel, I think about staying there if it says that it is cheaper for consecutive nights without cleaning services. If it is directly related to me, I will think about it. If it is sustainable and a bit expensive, I honestly wouldn't choose it. If it is of good value for money and reduces the environmental impact, I will select it.

**Awareness of recycling and reducing food loss in daily life. Some say they would rather wear old clothes for a long time than to dispose of clothes.**

- We try to keep in mind the SDGs on the environmental side. There is a service where you can carry your own bags and bottles as much as possible, and where you can earn redeemable "nanaco" points if you collect plastic bottles and put them out for recycling at *Ito-Yokado*. As a family, you can collect and put them out together.

- Rather than being just conscious of the SDGs, I try to recycle. As much as possible, I separate plastic and paper then put them out for collection.

- I often buy second-hand clothes. I don't get to put my clothes on the market, but instead of buying so-called "fast fashion" and throwing them away often, I try to wear the clothes I bought, such as second-hand clothes, for a long time.

**Japanese society as a whole is becoming more aware of the SDGs, through my part-time job, job hunting and travel.**

- At the family restaurant where I work part-time, the plastic containers for the drink bar were replaced by paper ones. The amount of waste decreased dramatically when the hand towels, which used to be served for customers, became self-service. These small changes are spreading throughout society.

- Since I started job hunting, I have been hearing about SDG-conscious initiatives (by companies) at information sessions, and I have the impression that the SDGs are permeating various aspects of society.

- Having learned about the SDGs in university, I am more conscious of "providing the same kind of education to people globally" than over environmental aspects.

### ●30s Age Group

**Motivation for sustainable behavior is more for my own enjoyment and benefit than for the planet.**

- I try not to buy plastic bottles, carry water bottles, and avoid plastic bags, but sometimes before I know it, I forget about it.

- Sometimes I am unaware of the importance of sustainability, especially when I travel, because I am more interested in doing what I can only do in the destination.

- In Thailand, take-out utensils are non-plastic, giving me the impression that they are more aware of sustainability than in Japan. Supermarkets in Bali are stocked with organic products and dairy/meat alternatives. I have washable straws from Bali, but I don't use them in Japan.

- I avoid store plastic bags because I have to use paid bags for garbage disposal at home. I use cute eco-bags as they excite me more than that for the environment.

In Germany, ecology is promoted nationally. Supermarkets are classified into categories based on how eco-friendly they are, rather than on pricing, or imported foods they carry. The idea that eco-conscious people are cool has taken root.

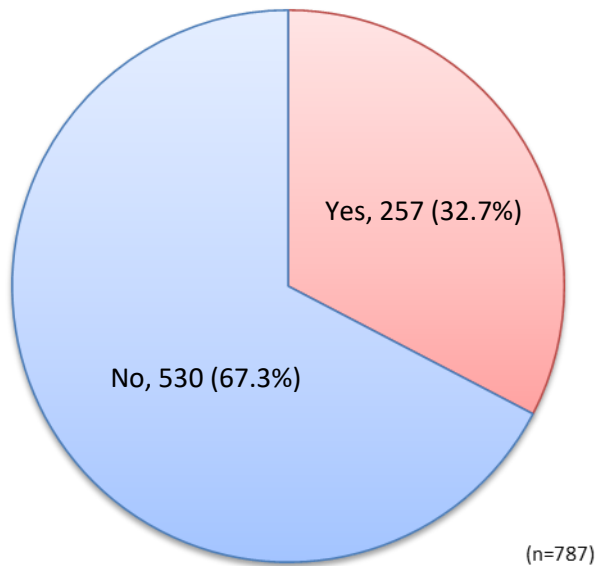


## 6. Sustainable Tourism-2 (Travel Awareness)

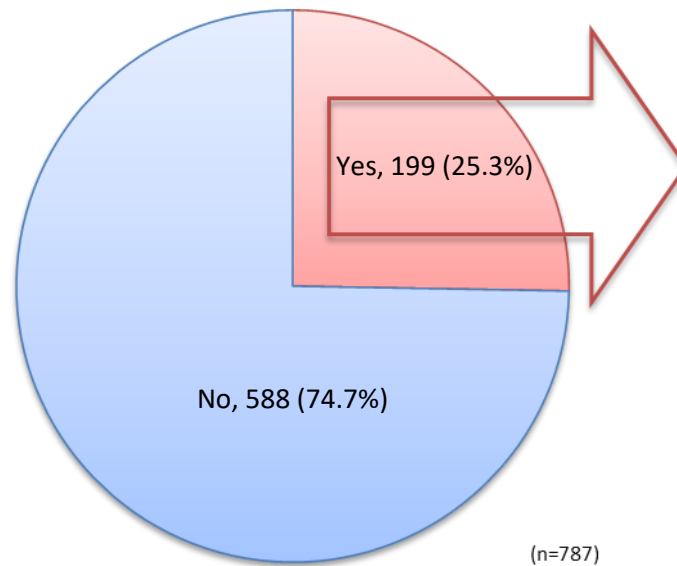
**Some three in 10 respondents are aware of SDGs and sustainability when selecting tourism destinations, with more than half of them selecting "priority on distribution of locally produced goods for local consumption" and "setting of sustainability standards" as criteria for selection**

About 30% of respondents answered that they are aware of the SDGs and sustainability when they travel, and that they have selected destinations and facilities that are aware of the SDGs and sustainability. Asked about their criteria for choosing SDGs- and sustainability-conscious tourist attractions and facilities when traveling, the most common response, at 61.8%, was "giving priority to distribution of locally produced goods for local consumption." Noteworthy was that the second-most common criterion, "Has some kind of sustainability standard, such as an international standard or the company's own standard," was selected by more than 50% of the respondents, indicating that they are seeking an objective and clear criteria to promote sustainable tourism.

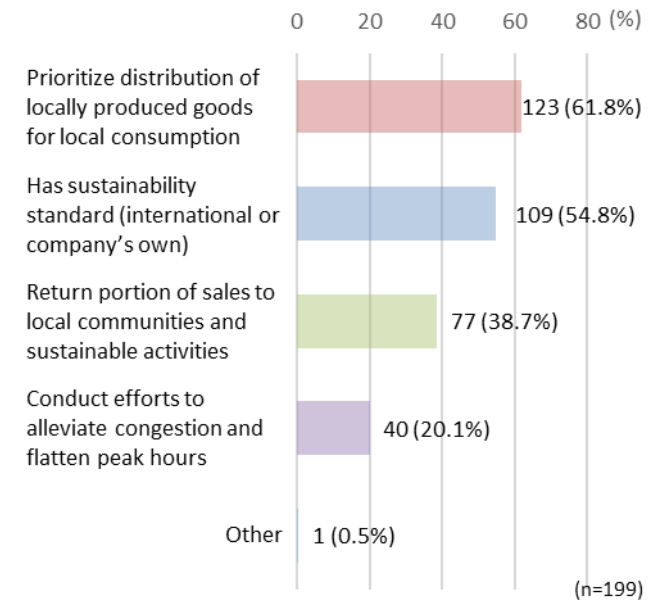
Have you ever considered SDGs or sustainability when traveling?



Have you ever chosen SDGs or sustainability-conscious destinations or tourist facilities when traveling?



What criteria do you use to select sustainable tourism destinations and facilities? Please select all that apply. (Multiple answers)



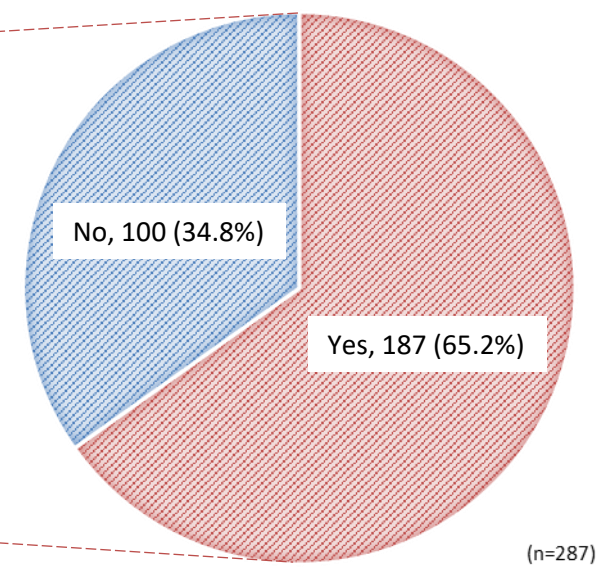
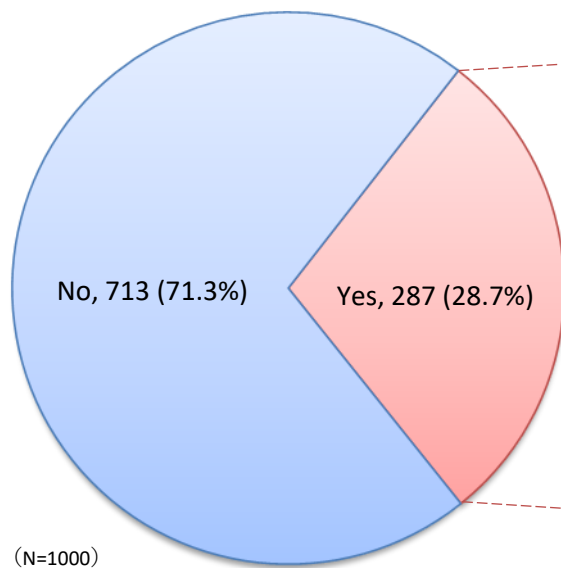
## 6. Sustainable Tourism-3 (Awareness of the Search Functions)

**Three in every 10 respondents are aware of the sustainable lodging function feature of reservation sites. More than 60% of those who are aware of the function have used it**

Despite being a relatively new feature, about 30% of the respondents were aware of the search function used by booking sites such as Booking.com and Rakuten Travel to narrow the list of accommodations that have sustainable initiatives. In addition, more than 60% of the respondents who were aware of these functions indicated that they have actually used them, suggesting that interest in sustainable practices among lodging facilities is quite high.

Accommodation booking sites such as Booking.com and Rakuten Travel allow you to narrow down your search for accommodations that are involved in sustainable initiatives. Did you know about these initiatives?

Have you actually used these functions to search for or book an accommodation?



## 6. Sustainable Tourism-4 (The Concept of Sustainable Tourism)

**A quarter of respondents understand the meaning of sustainable tourism, with about 80% answering that all three sustainable tourism initiatives are "necessary"**

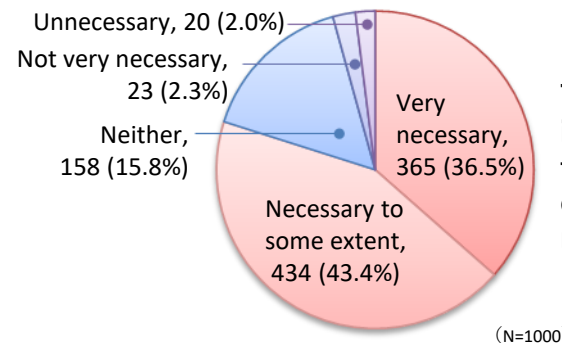
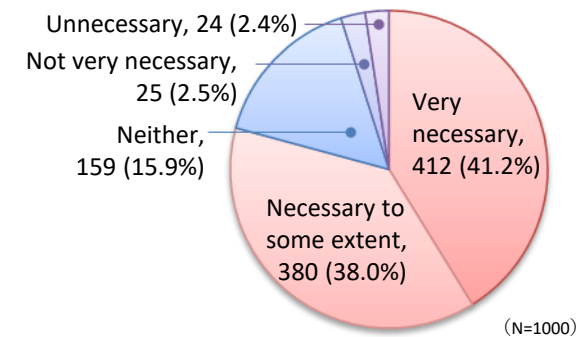
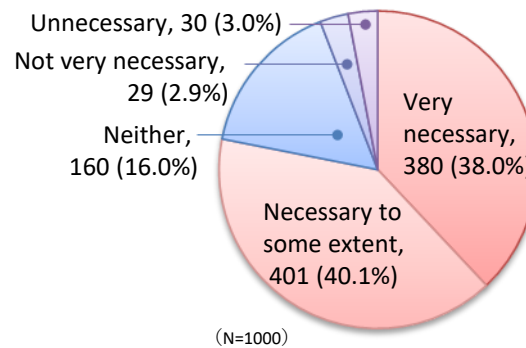
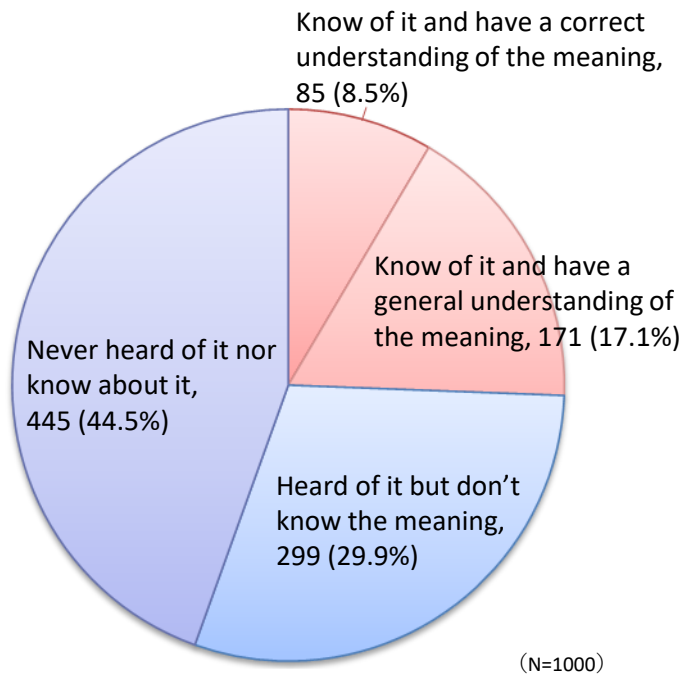
About 45% of the respondents answered that they had "no idea" about the term "sustainable tourism," but about 30% had "heard of it," with 25% having "a general understanding" or "a correct understanding of its meaning." Regarding the three initiatives required for sustainable tourism, about 40% answered that they were "very necessary" for all of them, and nearly 40% also answered that they were "necessary to some extent," indicating that some 80% of the respondents expressed that they were necessary.

Do you know the term Sustainable Tourism?

Below are three initiatives that are required for sustainable tourism. Which of the following best reflect your opinion on each of them?

**Preserving the environment, including local nature and biodiversity while making optimal use of tourism.**

**Tourism where cultural heritage such as local architecture, residents' lives and traditional values are respected by visitors.**



**Tourism that brings stable income and employment to the community and benefits everyone involved in a fair manner.**

## Roundtable Discussion: Sustainable Tourism

### ●20s Age Group

**Recognition of the term is low, and most of the answers give an image of environmental consideration.**

- I had an image that sustainable tourism equates to environmentally friendly.
- I heard this term for the first time. After doing some research, I learned that more and more eco-friendly tourist destinations were becoming popular. I thought that sorting garbage would help prevent air pollution and global warming. I believe that using public transportation will reduce emissions.
- I don't want to go somewhere simply because it's an area where people are careful about littering. It would be nice if the place you just happen to visit is naturally clean.
- Sustainable tourism has a strong image of using natural resources effectively instead of creating something new, such as environmental consideration. I just learned that it is related to overtourism for the first time. I myself have a desire to interact with local people when I travel, but I have never thought about their lives.
- When I travel, I often buy fruits and vegetables at local stalls or go to local supermarkets.
- When I participated in an internship in Fujinomiya, I heard that there are many Japanese people who think that nature is free. I personally believe that if everyone views it as something of value, and if it becomes a form of paying for it to experience, then a cycle of continuity will emerge.

**Interested in environmentally friendly travel, but want to keep travel costs low**

- The image of tourism is one that makes use of nature and the culture of the land. I like activities to enjoy nature, an attractive way of sightseeing. Sustainable tourism is a place or a form that is conscious of not destroying the environment.
- There was a SUP (stand-up paddle board) & Yoga tour in Malta. I didn't have the time to join but I thought it was sustainable because it consumed little and used few resources.

- My homestay was in rural Alberta, Canada. When my host family came to Japan, they were very surprised at the culture of disassembling PET bottles when they saw the trash cans for PET bottle caps.

### ●30s Age Group

**We are not familiar with the term itself, but all of us have experienced it in our travels. From now on, I want to take action to contribute to the destination.**

- In 2018, I participated in a trekking tour to meet ethnic groups in the hinterland of Viet Nam for 2 nights/3 days. There were about 20 people from different countries on the tour, who visited people's houses, cooked rice together, and slept in the village. I was impressed to know a culture and lifestyle of Viet Nam. I wonder if that was sustainable tourism. However, I wondered if the tour fee really went to the village, and if its nature was not ruined by trekking in a large group. I was also shocked to see Wi-Fi in the village. The showers were hot and convenient, which bothered me because tourism may be destroying its original culture. It is actually difficult to experience the culture and to bring money back to the local community.
- I had never heard the term "sustainable tourism" before. My impression was of a trip to pick up trash on the beach in a no-gas eco-friendly car. I don't feel that I am doing anything to contribute to sustainable tourism.
- Hawaii collects a lodging tax, and uses the money to analyze travelers and back it up by releasing it to tourism operators to further enrich tourism. After hearing this story, I no longer have a bad image of Japan's bath tax or Kyoto's lodging tax. I used to travel to stay in dormitories to see how cheap and long I could stay. At times I thought that if it were going to be a few hundred yen more, I might as well have stayed over there. I have no problem if it is used for the next trip. But I honestly don't know if it is being used appropriately.
- The impact on social media is one of the small gears that create a vicious cycle of attracting tourists, even if temporarily. In the long run, there are often phenomena that impacts the region. When I wanted to continue traveling, I thought through that experience, that if I could acquire and disseminate knowledge to allow me to visit a place for a longer time, then the cycle would go a little better.

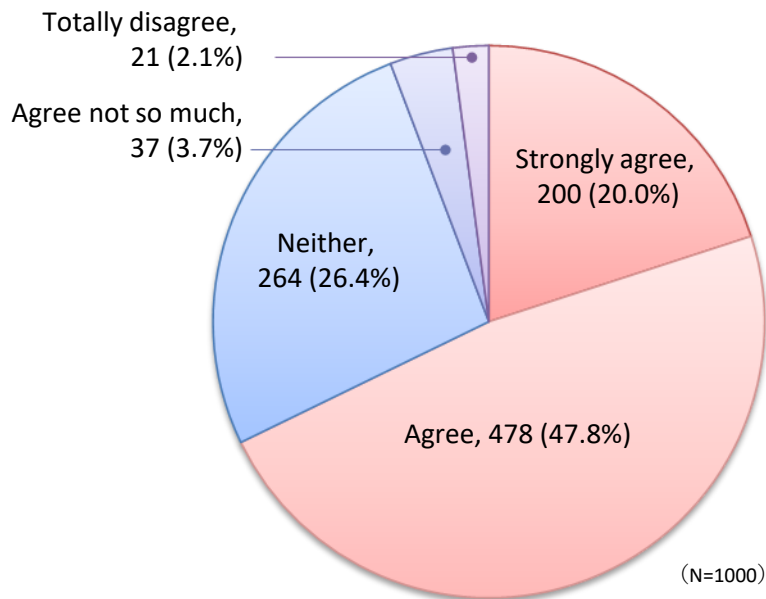
# III Survey Results

## 6. Sustainable Tourism-5 (Awareness as a Responsible Traveler)

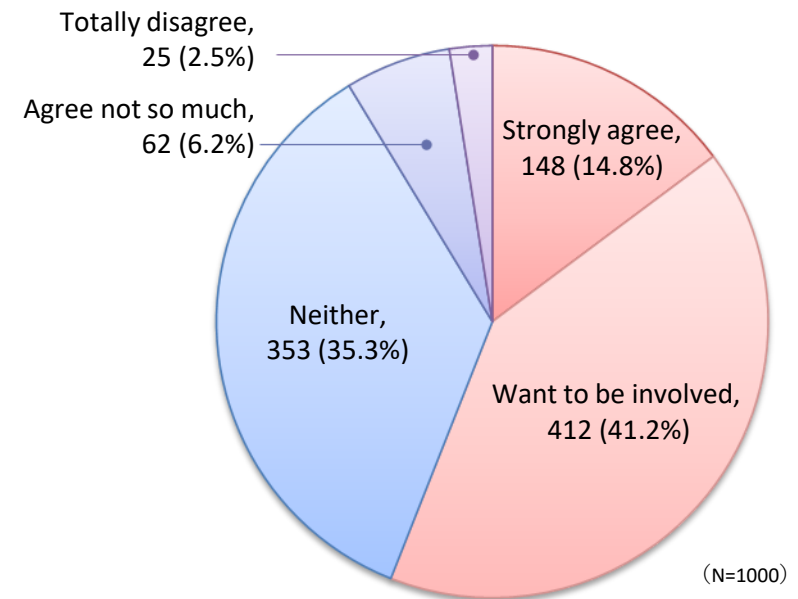
**About 70% of respondents "want to travel in a way that benefits the region they are visiting" with a majority who "want to be involved in the "region's sustainability"**

Two questions are asked to learn about attitudes toward being a responsible traveler. Asked if they wanted to spend money that would definitely benefit local businesses in the areas they visit, just under half of the respondents answer "Yes," and 20% answer "Very much so," for a combined total of just under 70%. In response to "If you could contribute to the sustainability of the region you are visiting, would you be willing to get involved?" approximately 40% answer "Yes" with 14.8% saying, "Very much," generating a total of 56% -- more than half of the total respondents.

Do you want to ensure that local businesses (e.g., farmers, community-based lodging facilities, souvenir manufacturers, etc.) that you visit for tourism benefit from your consumption?



If you could contribute in some way to the sustainability of the region you were visiting, would you be willing to be involved?



## 6. Sustainable Tourism-6 (Awareness of Sustainable Tourism in ASEAN)

Are you aware of any specific initiatives being undertaken in ASEAN Member States regarding sustainable tourism? If yes, please fill in as much as you know. Indicate "None," if there isn't any.

● Concept of Tourism

Micro tourism  
Green tourism

● Energy related

Renewable energy generation  
Energy storage  
Low-carbon, clean natural gas  
Solar panels  
Use of environmentally friendly fuels

● Cultural preservation

Folk traditional crafts  
Reuse of cultural heritage  
Cultural values

● Protection of the environment

Environmental preservation  
Environmental protection and conservation  
Water circulation  
Cleanliness of streets

● Action

Do what you think is good

● Introducing a tax

Introducing an entry tax, etc.

● Education

Environmentally friendly events

● Transportation

Issue day passes to allow people to use streetcars, etc.

● Equality

Equal tourism opportunities for both physically challenged and non-disabled people  
I don't know the details, but I have seen commercials of people in developing countries taking sustainable initiatives for people of all ages and genders.

● Garbage

Garbage pickup  
Garbage disposal  
Promoting garbage separation  
Reducing garbage

● Gas

Efforts to reduce emissions during travel

● Concepts

Interpretation planning & training, sustainable tourism

● Specific initiatives in ASEAN countries

Eco-resorts in Thailand  
Singapore: Construction of a large domestic water reservoir  
Eco-tours to observe the grey-faced buzzard, a bird of prey in Asia and found in the Philippines; or the Philippine Eagle  
Singapore city bike tours  
Singapore's efforts to punish littering by state law

● Poverty

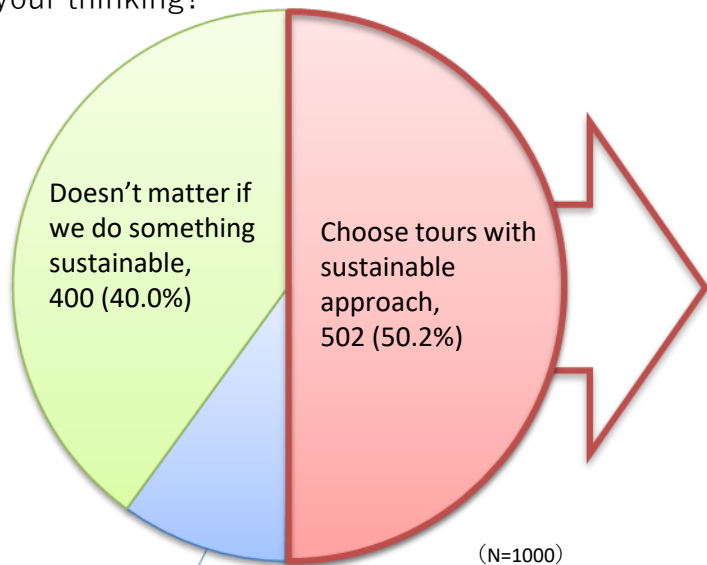
Elimination of poverty

## 6. Sustainable Tourism-6 (Actions as a Responsible Traveler)

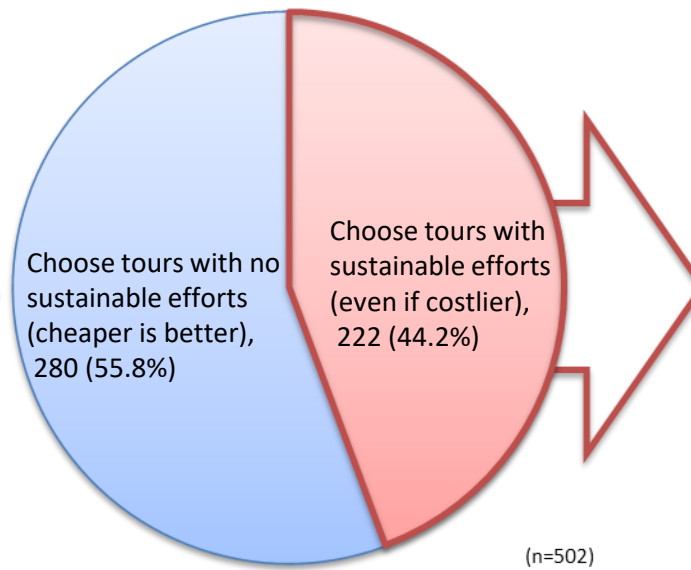
**Half of the respondents would choose a tour that clearly indicates sustainable efforts if the content is the same, with more than 30% saying they would be willing to accept a difference of between 1,000 yen and 3,000 yen**

In gauging their perception of the cost of sustainable tourism, we have compared products that explicitly state sustainable initiatives with those that do not, using a 5,000-yen optional tour as an example. Asked about their views on the same content and price, half of the respondents say they would choose a tour with sustainable initiatives. In the case of tours with sustainable initiatives, more than 40% say they would choose the one with sustainable initiatives (even if it were more expensive). Of those willing to pay more and by how much, the most common answer is "between 1,000 yen and 3,000 yen," reflecting over 30%, followed in second by "between 500 yen and 1,000 yen" at just under 30%. The third most common answer is "between 3,000 yen and 5,000 yen" for a ratio of over 20%.

If there are two optional tours that both cost 5,000 yen and have almost identical content, but one specifically states that it is "committed to sustainable practices such as preserving nature, benefiting the community, and reducing CO2 emissions," which one is closer to your thinking?

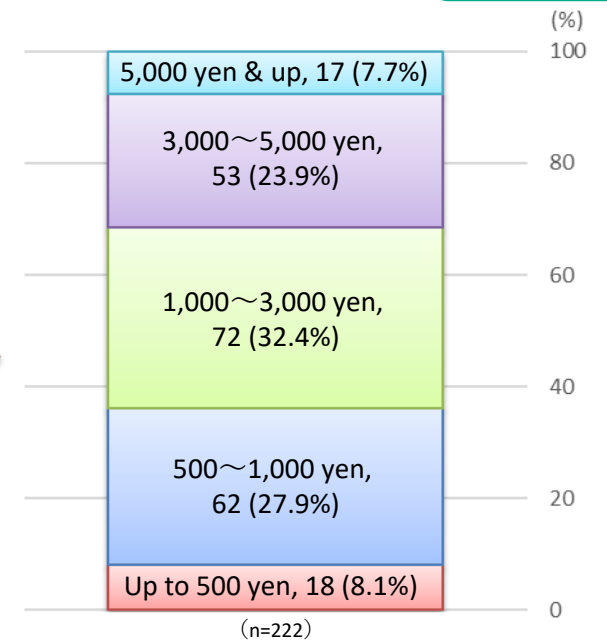


If an optional tour with sustainable practices is priced higher than a tour with identical content that does not, which of the following closely matches your opinion?



How much difference per person would you be willing to pay?

Roundtable Discussion, P. 24



Choose tours uncommitted to sustainability, 98 (9.8%)

## Roundtable Discussion: The Amount You Can Pay for Sustainable Tourism

### Opinions Differ on Added Cost

- I prefer the cheaper ones, so I choose by price. I once stayed at a lodging facility that provided bamboo amenities, which matched the atmosphere of the lodging very well. From a female's point of view, bamboo is prettier than plastic combs, and if it is sustainable, I would choose it even if it costs a little more.

- I don't think I would be able to afford it as a student if it is expensive. I will think about it when I become a working adult and have more money to spare, but right now, I think it would be difficult.

- I hope that what I consume will be returned to me in a good way, even if only a little. If I could afford it, I would choose it. But I feel uneasy if it is not clearly written out, wondering if it is true. I want to choose a place that clearly states it.

- If the price is the same, I would choose the sustainable one. If the content is the same and they say it is more expensive because it is sustainable, I honestly don't think I would go for that one.

- If the price is the same and the package says "eco-friendly," I would choose that one. If the information on the package is more specific, I would take the one with the same price. Even if I don't do anything special, if there is something I can do to help, then I would like to help.

- If it says that you can stay at a famous hotel such as a Hilton or a Hyatt for a certain price, I would think it is OK if I can stay at this hotel for this price. But if it says that you can stay at a hotel specializing in the SDGs for this price, I would find it difficult to choose that hotel if I am unaware of how much it is worth to me.

- If a hotel only displays the SDGs logo, it is not very credible, but if it clearly states that it is making a solid commitment to the SDGs, I would personally be willing to spend the money, depending on the price difference, in order to experience an extraordinary sightseeing experience.

- I would be willing to pay even 1,000 yen or 2,000 yen more if the basis is clear in what they are really doing. An additional 3,000 yen seems a bit expensive. But if they just talk about it, saying, "I'm doing it, but where? I don't choose them if they are just talking about it.

- I would choose the cheapest one. I am of a certain age and do not have the financial resources, so if I have to go to a place, I would choose the cheapest one, even if it has added value.

- If I pay for a sustainable hotel or tour, it's not for the environment, but to see whether the hotel or tour is attractive. If it is fun, interesting and environmentally friendly, I may pay for it. But I am not likely to pay for it just because it will improve the environment. If I have the time and money, I would, but as a student, I probably can't.

- The cheaper the better. Of course, if it is expensive, it is better if some options are included, but if it is just expensive, I would choose the cheapest one. Traveling is also a way to refresh your mind and heal your tired soul, so you don't want to get tired by being too conscious of sustainability. So cheaper is better.

- It depends on the content of the tour. For example, I would pay for a coral reforestation tour in Okinawa Prefecture if it is a trip that is not possible to do without participating in the tour. Also, this may be a student's point of view, but I think I would be conscious of tours where I can see a photo-worthy scenery since I take pictures and put them up on Instagram.



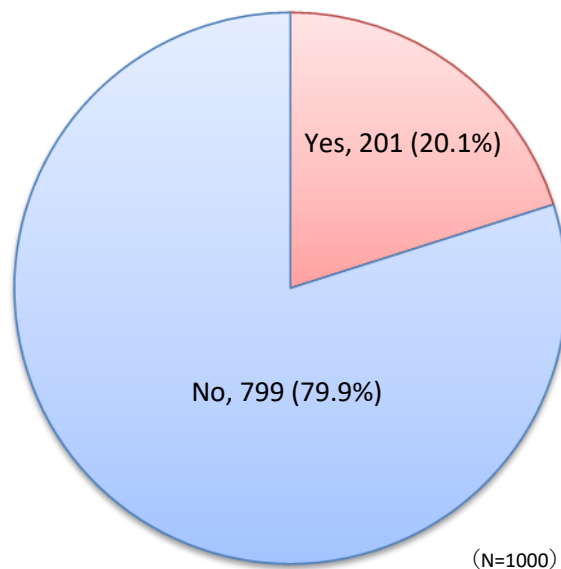
# III Survey Results

## 6. Sustainable Tourism-7 (Case Study--Overtourism)

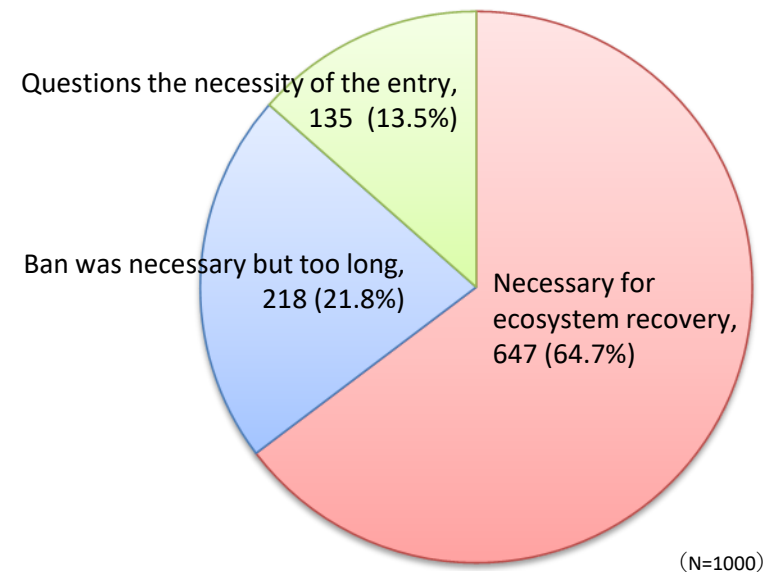
**Some six in 10 respondents said that the 3.5-year ban was "necessary for an ecosystem recovery" while 20% said "it is necessary but the period was too long"**

Based on the case of Phi Phi Island, Thailand, we have investigated the awareness of overtourism and the measures to alleviate congestion. Efforts to ban tourists from entering the area in order to restore the ecosystem damaged by the rise in tourists have often been featured in the media, but only 20% of the respondents say they are aware of it. Regarding the 3.5-year ban on entry, 65% evaluate it as "necessary for ecosystem recovery," while 20% answer that "it is necessary, but 3.5 years was too long." More than 10% respond, questioning if the entry ban is necessary.

Did you know that this initiative was covered in the news and written in newspaper articles?



What do you think about the efforts to ban tourists from entering the area for three and a half years?

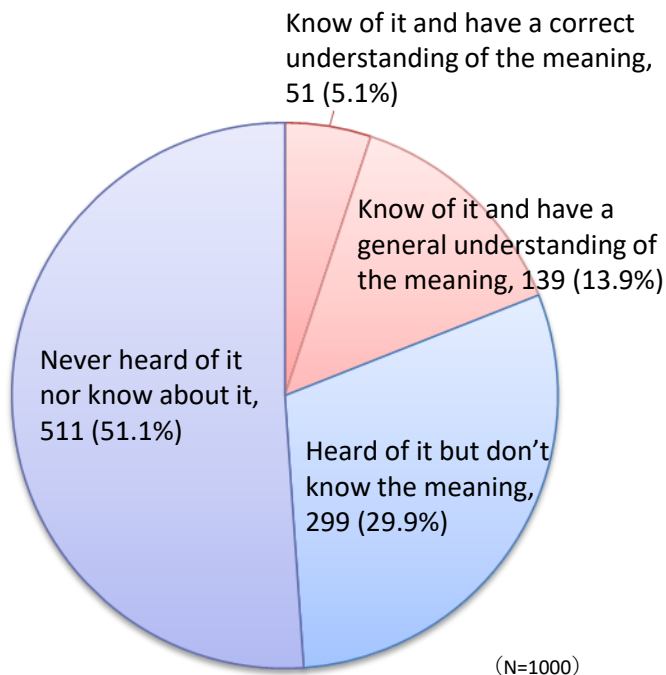


## 6. Sustainable Tourism-7 (Case Study--Overtourism at Maya Bay, Phi Phi Island, Thailand)

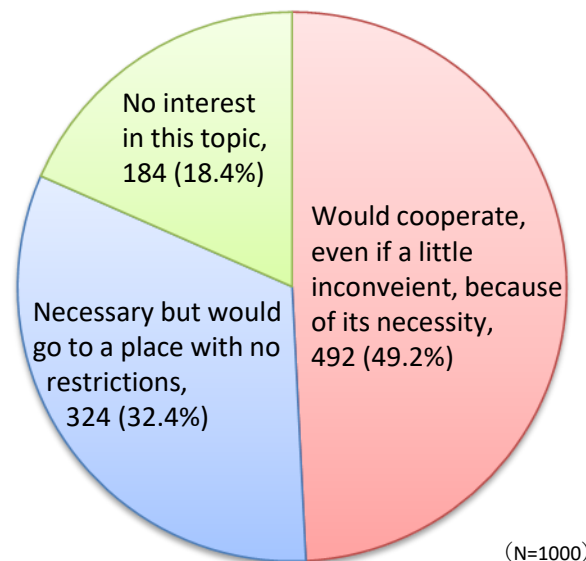
### Half of the respondents said that they "do not know about overtourism at all" and "want to cooperate with mitigation efforts"

Based on the case study of Phi Phi Island, we have surveyed attitudes toward overtourism and measures to alleviate overcrowding. While 65% of the respondents evaluate the 3.5-year effort to restore the ecosystem by banning tourists from entering the island as "necessary," 20% say "it is necessary, but the time period was too long." As for the term "overtourism," the most common response is "I have never heard of it," accounting for 50%. Some 30% say they have heard of it but are unfamiliar with its meaning. Only 20% say they understand its meaning. As for efforts to alleviate overtourism, half say they would like to cooperate with such efforts because they are necessary, while more than 30% say they think they are necessary but would prefer to choose a place with no restriction if they were going there themselves. Some 60% also say they "would like to actively use" efforts to ease congestion, such as advance reservation systems, while more than 20% say they "want to avoid congestion, but it is a hassle to research and make reservations in advance." While it is possible to ask travelers to cooperate to some extent with overtourism and efforts to reduce congestion, it is apparent that not a small number of people feel that it is a hassle.

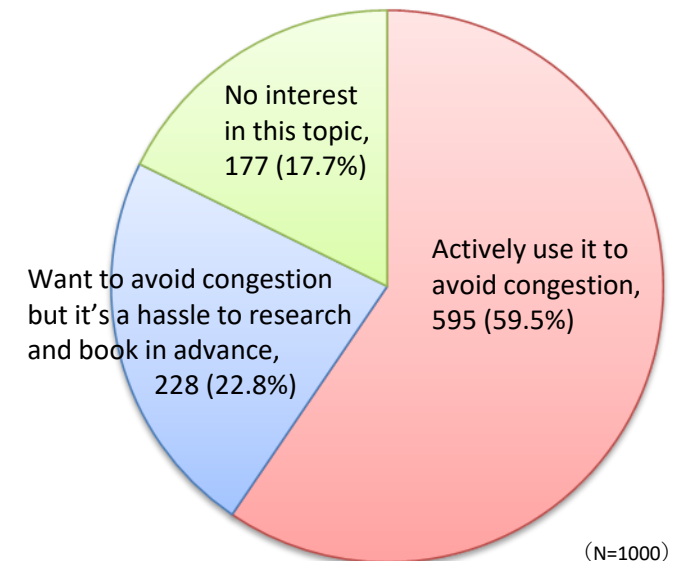
Have you ever heard the term overtourism?



Which of the following is closest to your own ideas about taking steps to mitigate overtourism?



In order to avoid overtourism and reduce congestion, tourist facilities are also taking initiatives such as sending out real-time congestion status via social media. What are your thoughts on these initiatives?



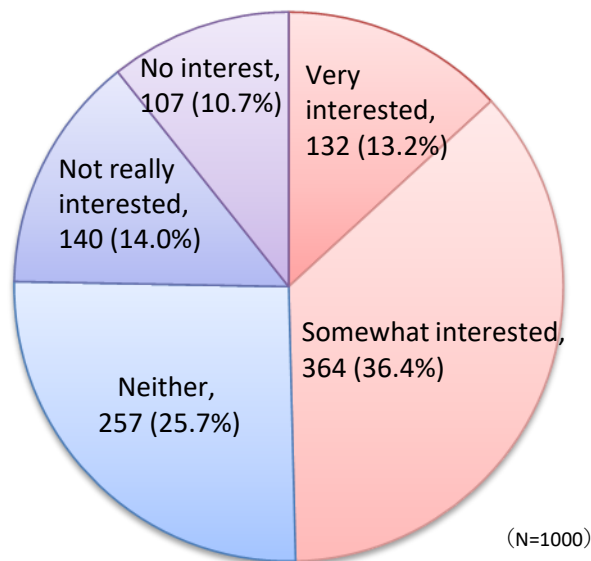
# III Survey Results

## 7. ASEAN Initiatives

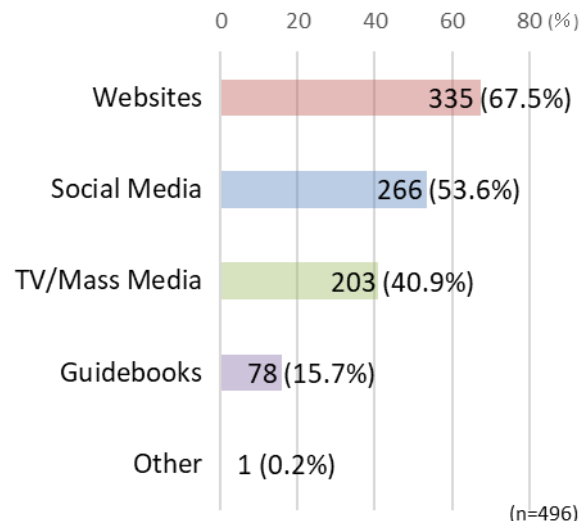
**Nearly half of respondents are interested in ASEAN's sustainable tourism initiatives, with about 90% saying that "knowing about the initiatives will influence their next trip"**

Asked if they are interested in sustainable tourism initiatives in ASEAN, nearly 40% of the respondents answer "Somewhat interested" and more than 10% answer "Very interested," underscoring a combined interest of about half of all respondents. The most common means of obtaining information on initiatives is "websites" at just under 70%, which is higher than the more than 50% for "social media," a method that this generation is most likely to use to obtain information, as indicated in "5. Obtaining Information" (p. 13). Some 50% cite that learning about sustainable tourism initiatives "affected to a certain level" their choice on the next travel destination. Some 20% answer "greatly affected," while about 15% say has "affected," bringing to a combined ratio of nearly 90% of respondents.

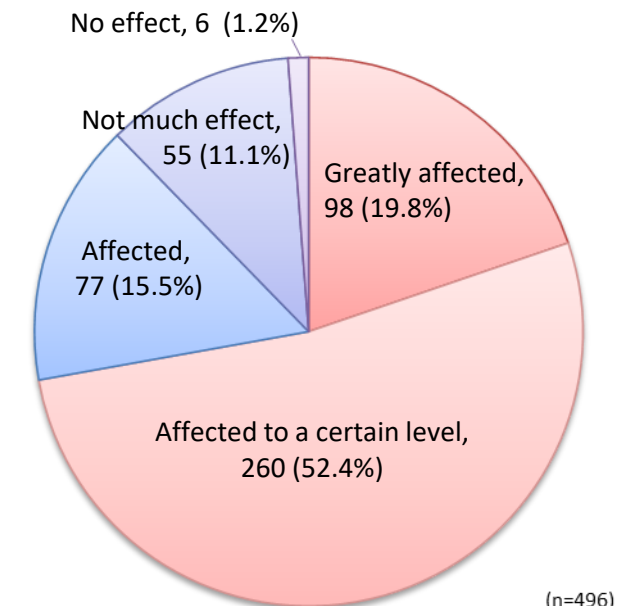
There are many other sustainable tourism initiatives in the 10 ASEAN countries. Are you interested in these initiatives?



What media or channels do you think would be the best way to obtain information about such sustainable tourism initiatives (multiple responses)?



Does knowing about such sustainable tourism initiatives influence your decision on where to travel next?



## 8. Dissemination of Information on ASEAN

**The most common response for "helpful" information on sustainable tourism initiatives in ASEAN is "public organizations such as government tourism offices" at 25%**

Asked to use social media to learn about sustainable tourism initiatives in the 10 ASEAN countries, 25% of respondents say that "official organizations such as government tourism offices" are considered the most useful source of information, followed by "specialized travel media" and "travel agencies," each accounting for approximately 20% of respondents. Less than 20% of respondents has seen ASEAN Travel, a Southeast Asia tourism information website operated by the ASEAN-Japan Centre, and only slightly more than 10% has seen the official Instagram tourism account.

What kind of sources do you think would be helpful to learn about sustainable tourism initiatives in the 10 ASEAN countries on social media?

The ASEAN-Japan Centre operates a tourism information website for Southeast Asia called ASEAN Travel (<https://travel.asean.or.jp>). Have you ever seen this site?

ASEAN-Japan Centre has an official Instagram account (@aseanjapancentre). Have you ever seen our posts?

Word of Mouth, 11 (4.1%)

