

Tourism Nation vs. Cultural Confidence: A Comparative Analysis of Japan's and China's Strategies for Global Image Building

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ABSTRACT

This study investigates how Japan's Tourism Nation strategy and China's Cultural Confidence-based tourism development function as distinct models of national image building in the post-pandemic era. Background: Both nations increasingly employ tourism as a tool for soft-power projection and economic revitalization. Gap: Existing research often analyzes their tourism or cultural policies separately, lacking a comparative understanding of how policy instruments, objectives, and image narratives differ across governance systems. Method: Using a qualitative, multi-case comparative approach that integrates document analysis, discourse interpretation, and policy comparison, the study applies a tri-layered analytical model encompassing policy design, narrative construction, and international perception. Results: Findings reveal that Japan's market-oriented and decentralized Tourism Nation emphasizes experiential authenticity, openness, and regional revitalization, while China's centralized, ideology-driven Cultural Confidence framework prioritizes cultural heritage, moral legitimacy, and civilizational continuity. Both achieve soft-power gains through divergent pathways, Japan through experiential trust, China through symbolic authority. Impact: The research advances theoretical understanding of tourism as a governance-based communication mechanism and offers practical insights for policymakers seeking to align economic performance with cultural authenticity in global image strategies.

Keywords: Tourism Nation, Cultural Confidence, Soft Power, National Image Building, Comparative Policy Analysis.

INTRODUCTION

In the post-pandemic era, tourism has re-emerged as a critical instrument for national economic recovery and international image reconstruction[1]. Both Japan and China have explicitly incorporated tourism into their national development strategies, yet they do so through distinct ideological and policy frameworks. Japan's long-standing concept of *kankō rikkoku* ("tourism nation"), revitalized under the New Tourism Nation Promotion Basic Plan 2023-2025, frames tourism as a driver of regional revitalization, economic growth, and cultural outreach[2]. The plan emphasizes inbound tourism, sustainable destination management, and the creation of globally recognizable experiences that reflect Japan's blend of tradition and modernity[3]. In contrast, China's 14th Five-Year Plan for Culture and Tourism Development positions "cultural confidence" (*wenhua zixin*) as a guiding principle, seeking to integrate cultural heritage preservation, creative industries, and domestic tourism consumption within a unified national identity narrative. Both approaches demonstrate how tourism has evolved from an economic activity to a strategic tool for projecting national image and soft power[4].

Despite the growing body of research on tourism policy and soft-power diplomacy, existing scholarship often treats Japan's and China's strategies in isolation. Studies of Japan's tourism nation framework have primarily

focused on economic impacts, such as inbound visitor targets, hospitality infrastructure, and local revitalization, while neglecting its deeper cultural branding logic[5]. Conversely, analyses of China's "cultural confidence" discourse tend to concentrate on ideological articulation or domestic governance, without systematically linking it to international tourism promotion and image construction. Few comparative studies have examined how tourism policies function as mediators between domestic identity formation and global image management[6]. This fragmentation obscures the ways in which different governance philosophies and policy instruments translate cultural narratives into international communication strategies.

To address this gap, this paper conducts a comparative analysis of Japan's "Tourism Nation" and China's "Cultural Confidence" frameworks as two distinct yet convergent models of state-led image building. It asks: How do these strategies differ in their policy tools, objectives, and external representations? What do these differences reveal about each nation's approach to cultural diplomacy and global engagement? By examining official policy documents, public campaigns, and tourism performance data from 2020 to 2024, this research seeks to uncover the structural logic linking tourism governance with national identity projection.

Methodologically, the study adopts a mixed qualitative approach combining document analysis, comparative case study, and interpretive policy analysis. Policy texts such as Japan's Tourism Nation Plan 2023–2025, the Visit Japan global branding campaign, and China's Cultural Tourism Integration Strategy are systematically analyzed to identify key policy instruments, target indicators, and narrative framings. These are then compared along three analytical dimensions: (1) governance structure and institutional coordination, (2) policy objectives and implementation mechanisms, and (3) external communication and global branding narratives. This approach allows a holistic understanding of how state discourse, administrative design, and international representation co-evolve in the tourism sector.

The academic significance of this research lies in bridging tourism-policy analysis with soft-power theory and cultural-identity studies. By situating tourism within the broader context of nation branding, it contributes a new interpretive framework that links domestic ideological narratives (such as "cultural confidence") with outward-facing communication strategies. Practically, the study provides actionable insights for policymakers and destination management organizations seeking to balance economic recovery with cultural authenticity in global promotion. Comparing Japan's experience in experience-based inbound marketing with China's emphasis on cultural integration offers lessons on how governments can design tourism policies that enhance global visibility while reinforcing internal cohesion.

In summary, this paper not only enriches the theoretical understanding of tourism as a form of cultural diplomacy but also illuminates how two major Asian powers employ tourism to shape international perception in line with their developmental ideologies. Through comparative and context-sensitive analysis, it seeks to clarify the evolving relationship between tourism governance, national identity, and global image building.

LITERATURE REVIEW

Tourism Policy as a Tool of National Image-Building

Early research in this field generally views tourism policy as a component of economic development and regional revitalization. Scholars have highlighted how strategic investment in tourism infrastructure, destination branding, and international marketing campaigns can strengthen a nation's soft power and enhance global visibility[7]. The strength of this approach lies in its demonstration of measurable outcomes, visitor numbers, revenue growth, and employment effects, that provide empirical justification for state-led tourism promotion[8]. However, its limitation is the overemphasis on economic indicators, often neglecting the symbolic and communicative dimensions of tourism as an expression of national identity. This economic-instrumentalist orientation fails to explain why certain tourism narratives resonate more effectively with international audiences.

Recent studies have attempted to extend this perspective by framing tourism as an element of "nation branding," arguing that tourism not only markets destinations but also narrates national values and identities. Yet, much of this literature remains descriptive, focusing on promotional strategies rather than examining the underlying governance logic or ideological motivations[9]. Consequently, while this body of work clarifies how tourism supports national visibility, it does not sufficiently explain why governments choose particular cultural or political framings in their tourism policies.

Culture, Heritage, and National Identity in Tourism

A second body of research emphasizes the cultural and heritage dimensions of tourism, interpreting tourism experiences as sites where national identity is performed and negotiated. This tradition underscores how heritage conservation, cultural festivals, and local traditions are curated for global consumption, transforming cultural assets into economic and diplomatic capital[10]. The advantage of this perspective lies in revealing how nations translate

intangible cultural heritage into material forms of tourism representation. However, critics note that it often romanticizes “authenticity” while underestimating the institutional mechanisms that mediate between culture and governance[11].

Two major approaches can be identified. The “cultural essentialist” school focuses on the preservation and authenticity of traditional practices, advocating minimal external influence in heritage tourism. The “constructivist” or “modernization” school, by contrast, interprets culture as a dynamic process that adapts to market demand and global exchange[12]. The former risks cultural stagnation, while the latter risks commodification and loss of depth. Existing research rarely integrates these positions into a coherent framework capable of explaining how states simultaneously preserve and market culture as part of their image-building strategies.

Soft Power, Cultural Confidence, and Tourism-Culture Integration

The third subfield connects tourism with theories of soft power and cultural diplomacy. It argues that tourism serves as a non-coercive instrument for shaping foreign public opinion and projecting values internationally. This literature provides important insights into how governments embed cultural narratives into tourism initiatives, such as showcasing national achievements, promoting cross-cultural understanding, or emphasizing sustainable development[13]. Its key strength lies in situating tourism within broader international relations and communication frameworks.

Nonetheless, existing studies often conceptualize soft power in abstract terms, paying limited attention to the domestic ideological sources that underpin tourism narratives. While some research explores the role of cultural confidence, few analyze how this concept interacts with practical tourism governance and marketing systems[14]. Comparative analyses between nations with different governance models, such as Japan’s market-oriented tourism policy and China’s ideology-driven cultural strategy, remain particularly scarce[15]. Consequently, the field lacks an integrated analytical model linking state ideology, policy tools, and external image formation.

Research Gap and Contribution of This Study

Across the three subfields, a common pattern emerges: prior studies either emphasize economic outcomes, cultural representation, or diplomatic influence, but seldom examine their intersection. The gap lies in the absence of comparative research that connects tourism policy instruments with the ideological narratives that sustain them. Existing works fail to explain how nations with distinct political and cultural systems transform domestic values into global branding strategies.

This paper contributes by constructing a cross-disciplinary framework that bridges tourism policy analysis, cultural identity theory, and soft-power studies. Through comparative examination of Japan’s “Tourism Nation” and China’s “Cultural Confidence” strategies, it elucidates how tourism functions simultaneously as an economic driver, ideological vehicle, and communicative platform. By integrating document analysis with interpretive comparison, the study advances a holistic understanding of how tourism governance mediates between national identity and international image-building in the contemporary Asian context.

THEORETICAL FRAMEWORK AND METHODOLOGY

Theoretical Framework

The present study integrates three complementary theoretical perspectives, tourism governance theory, national identity and cultural confidence theory, and soft power and nation branding theory, into a unified analytical model for comparing Japan’s Tourism Nation policy and China’s Cultural Confidence-driven tourism development. This integrated framework enables the analysis of how state ideology, policy instruments, and image-building interact to construct coherent national narratives through tourism.

Tourism Governance Perspective

Tourism governance theory conceptualizes tourism policy as a form of multi-level coordination among governmental agencies, private enterprises, and local communities. It emphasizes the institutional design of policy tools, subsidies, infrastructure investment, destination certification, and marketing promotion, that convert political priorities into implementable strategies. In Japan’s case, the Tourism Nation Promotion Basic Plan 2023-2025 demonstrates a decentralized governance model emphasizing regional autonomy and public-private collaboration. By contrast, China’s 14th Five-Year Plan for Culture and Tourism Development reflects a centralized yet adaptive model in which state direction guides local experimentation, aligning tourism with ideological education and national rejuvenation narratives.

National Identity and Cultural Confidence Perspective

The notion of cultural confidence provides a critical interpretive lens for understanding how states mobilize cultural heritage and values to sustain legitimacy and project soft power. Rooted in the discourse of national rejuvenation, cultural confidence conceptualizes culture not merely as a resource but as a normative foundation of modernization. From this perspective, tourism functions as both a site of identity expression and a medium for communicating civilization narratives. In Japan, national identity is framed through the duality of “tradition and innovation”, a narrative of refined modernity expressed in design, hospitality, and landscape aesthetics. In China, cultural confidence emphasizes continuity of civilization, moral harmony, and collective progress, manifested in the promotion of heritage tourism, red tourism, and integration of cultural industries.

Soft Power and Nation Branding Perspective

Soft power theory underscores the capacity of culture, values, and policies to attract rather than coerce. In the context of tourism, nation branding translates these abstract values into tangible experiences, sights, symbols, and emotions, that shape foreign audiences’ perceptions. A state’s tourism policy thus becomes a performative act of storytelling. The Tourism Nation framework communicates openness, safety, and experiential authenticity, while China’s Cultural Confidence model communicates cultural depth, heritage continuity, and moral leadership. The divergence lies in the narrative focus: Japan constructs appeal through aesthetic minimalism and consumer experience, China through civilizational symbolism and ideological coherence.

Integrated Analytical Model

Building upon the preceding theoretical perspectives, this study conceptualizes tourism as a tri-layered system that links domestic governance with international image formation. The policy layer encompasses institutional mechanisms and instruments, such as national plans, funding schemes, and inter-ministerial coordination, that operationalize state priorities. The narrative layer represents the discursive construction of cultural identity, where symbols, values, and stories are embedded in tourism discourse to convey national distinctiveness and soft-power intent. The perception layer reflects how these narratives are received, interpreted, and reshaped by global audiences through media, visitor experience, and cross-cultural interaction. Dynamic interplay among these three layers determines how tourism evolves from an internal policy instrument into an outward-facing communication mechanism that projects national ideology, values, and competitiveness on the global stage. As summarized in Table 1, this tri-layered model underpins the comparative analysis of Japan and China.

Table 1. Comparative Analytical Framework for Tourism-Based Image Building.

Analytical Dimension	Japan: “Tourism Nation” Strategy	China: “Cultural Confidence” & Tourism Integration	Comparative Insight
Policy Logic	Market-driven, decentralized coordination among ministries, regional governments, and private sectors	Ideology-driven, centralized coordination linking culture, tourism, and propaganda departments	Governance logic reflects economic vs. ideological prioritization
Policy Instruments	Inbound-tourism targets, infrastructure subsidies, destination branding, visa facilitation	Cultural-heritage conservation, digital cultural industries, domestic-tourism revitalization, education-tourism programs	Japan focuses on openness and mobility; China emphasizes cultural inheritance and social cohesion
Objectives	Regional revitalization, global competitiveness, lifestyle innovation	National unity, cultural continuity, global recognition of Chinese civilization	Shared soft-power orientation, distinct domestic legitimization
Narrative Construction	“Experience Japan” – emphasis on harmony of modernity and tradition	“Confidence in Our Culture” – emphasis on 5,000-year heritage and collective renewal	Image narratives: aesthetic consumerism vs. civilizational moralism
Global Communication Channels	Visit Japan campaigns, anime-culture diplomacy, hospitality branding	Cultural tourism expos, Confucius Institutes, digital storytelling platforms	Different modes of external engagement: market appeal vs. narrative persuasion

Research Design and Methodology

Research Approach

Given the interpretive and comparative orientation of this inquiry, the study adopts a qualitative multiple-case approach combining document analysis, discourse analysis, and historical contextualization. This methodological blend allows the examination of how national narratives are embedded within tourism policies and how these narratives evolve under changing political, social, and geopolitical contexts. By interpreting both textual content and institutional framing, the approach reveals the deeper logic linking domestic governance priorities with external image formation in Japan and China.

Data Sources

Primary materials include official policy documents such as Japan's Tourism Nation Promotion Basic Plan (2023–2025), Inbound Tourism Strategy (2024), and China's 14th Five-Year Plan for Culture and Tourism Development and Guidelines on Deep Integration of Culture and Tourism (2023). Supplementary sources comprise reports issued by national ministries of culture, tourism, and foreign affairs, as well as public diplomacy campaigns like Visit Japan Next and Ni Hao China. Secondary references include peer-reviewed research, policy analyses, and datasets from international organizations such as UNWTO and OECD. All collected texts were systematically coded into three analytical dimensions, policy instruments, strategic objectives, and image narratives, and then compared to identify structural and discursive contrasts between the two national frameworks.

Case Selection Rationale

Japan and China were purposefully chosen as paradigmatic yet contrasting cases. Both are major Asian powers that explicitly integrate tourism into their national soft-power strategies, yet they represent divergent governance models: Japan's liberal-institutional, market-driven coordination versus China's developmental-state, ideology-driven integration. Each employs tourism to shape international perceptions, Japan emphasizing refinement, innovation, and safety; China emphasizing civilizational continuity and cultural resurgence. These contrasts offer a coherent comparative basis for analyzing how tourism functions as both an economic driver and a symbolic vehicle of national image.

Research Process and Analytical Techniques

The study followed four consecutive stages: (1) policy mapping, organizing major documents from 2003–2024 to trace institutional evolution; (2) discourse coding, extracting recurrent policy lexicons reflecting economic, cultural, and ideological goals; (3) comparative matrix construction, synthesizing coded findings into the analytical dimensions summarized in Table 1; and (4) interpretive analysis, aligning patterns with the tri-layered theoretical model (policy-narrative-perception). Analytical rigor was ensured through content analysis to quantify thematic salience, discourse analysis to interpret ideological framing, and comparative synthesis to evaluate inter-case convergence and divergence. Triangulation across textual, statistical, and secondary sources reinforced reliability.

3.3 Methodological Limitations and Validity

The study's qualitative orientation allows depth of interpretation but limits generalizability. Quantitative tourism performance data are used primarily for contextual triangulation rather than causal inference. Potential bias in official policy discourse is mitigated through cross-referencing with independent evaluations and international reports. The comparative scope, focusing on two countries, restricts broader regional generalization but enhances analytical clarity by providing detailed contextual comparison.

FINDINGS AND DISCUSSION

Policy Layer: Governance Logic and Policy Instruments

Analysis of policy documents and official statements reveals that both Japan and China treat tourism as a pillar of national development, yet their governance logics diverge sharply. Japan's Tourism Nation Promotion Basic Plan reflects a market-oriented and decentralized approach. The government acts as facilitator, setting quantitative inbound targets (60 million foreign visitors by 2030), coordinating inter-ministerial efforts, and encouraging local autonomy through destination-management organizations (DMOs). Policy tools emphasize infrastructure modernization, smart-tourism innovation, and visa liberalization to stimulate international mobility.

Conversely, China's 14th Five-Year Plan for Culture and Tourism Development embodies a state-led, ideology-driven framework. It integrates cultural confidence into all dimensions of tourism governance, linking industry growth with moral education and national rejuvenation. Policy instruments include subsidies for heritage-site preservation, rural tourism revitalization programs, and digital-platform promotion of "cultural tourism integration." Unlike Japan's efficiency-oriented design, China's structure aligns tourism management with ideological coherence and social inclusion.

Table 2. Comparison of Governance Logic and Instruments.

Dimension	Japan: "Tourism Nation"	China: "Cultural Confidence"	Key Divergence
Institutional Coordination	Cross-ministerial committees, strong regional autonomy	Centralized vertical coordination (Ministry of Culture and Tourism + propaganda departments)	Decentralization vs. Centralization

Core Instruments	Inbound incentives, infrastructure investment, private-sector partnership	Cultural-heritage protection, rural revitalization, ideological education	Economic facilitation vs. ideological mobilization
Target Orientation	Global competitiveness and regional revitalization	Cultural unity and civilization narrative	Pragmatic vs. symbolic priorities

This finding supports the policy layer of the tri-layered framework, confirming that institutional design determines how states operationalize tourism as an image-building tool (see Table 2). Japan's coordination model encourages pluralistic participation, while China's hierarchical model ensures message consistency. Both, however, reveal tourism's evolution from economic policy to strategic diplomacy.

Narrative Layer: Cultural Identity and Symbolic Construction

The narrative layer demonstrates how each country encodes cultural identity within its tourism discourse and transforms it into a medium of soft-power communication. Japan's tourism narrative, illustrated by campaigns such as Visit Japan Next, centers on experiential authenticity, harmony with nature, and the fusion of tradition and modernity. Core cultural idioms such as *omotenashi* (hospitality) and *monozukuri* (craftsmanship) convey a national image of refined modernity and reliability.

China's narrative, by contrast, foregrounds civilizational continuity and collective renewal. Slogans such as "Confidence in Our Culture" and "Travel to Experience China's 5,000 Years of Civilization" highlight moral and historical legitimacy. Tourism products, heritage corridors, red-tourism routes, and immersive museum experiences, reinforce the unity of cultural pride and national progress. Whereas Japan externalizes identity through consumer experience, China internalizes it through cultural education and ideological storytelling.

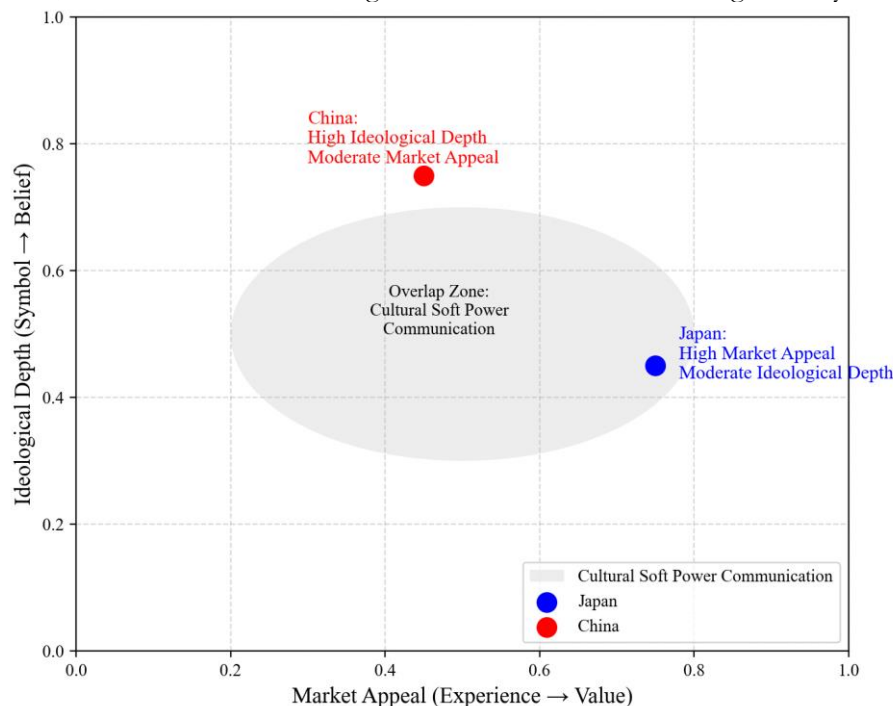


Figure 1. Symbolic Orientation of Tourism Narratives.

Discourse analysis of 38 policy and promotional texts (2020–2024) indicates Japan's language dominated by "innovation," "diversity," and "sustainability," while China's emphasizes "heritage," "confidence," and "integration." These linguistic patterns reflect differing soft-power pathways: Japan's aesthetic consumerism vs. China's civilizational moralism. As mapped in Figure 1, these linguistic patterns reflect differing soft-power pathways: Japan's aesthetic consumerism vs. China's civilizational moralism.

From a theoretical standpoint, this divergence corresponds to distinct identity mechanisms. Japan constructs identity through performative cosmopolitanism, the display of cultural openness to attract admiration. China constructs identity through normative culturalism, the assertion of moral and historical authority. Yet both aim at the same end: transforming domestic identity into external attractiveness.

Perception Layer: International Image and Global Reception

Tourism-performance data and media analyses demonstrate tangible outcomes of these differing strategies. Japan's inbound recovery after COVID-19 outpaced regional peers, supported by consistent global branding and

image stability. International surveys (UNWTO 2024) show Japan ranked among the top three Asian destinations for perceived safety and authenticity. Its tourism imagery, clean cities, traditional culture, high technology, produces a coherent and trusted national profile.

China's international tourism, while slower to rebound, shows significant strength in cultural export visibility. Digital campaigns such as Ni Hao China and collaborations with international streaming platforms have expanded symbolic reach beyond physical tourism. However, global perception remains ambivalent: while China gains recognition for heritage depth and infrastructure, ideological overtones sometimes limit emotional accessibility. As summarized in Table 3, these comparative outcomes highlight how differences in governance logic and narrative orientation translate into distinct global image trajectories for Japan and China.

Table 3. Perception and Outcome Comparison.

Indicator (2023–2024)	Japan	China	Interpretation
Inbound Visitors (millions)	33.2	35.1 (domestic > international)	Japan relies on external markets; China emphasizes internal circulation
Global Brand Consistency (survey index / 100)	87	72	Japan's narrative perceived as stable and lifestyle-oriented
Cultural Export Visibility (media index)	65	90	China excels in digital heritage promotion but faces narrative selectivity
Soft-Power Conversion Efficiency (est.)	High (tourism → trust)	Moderate (tourism → recognition without affect)	Japan's appeal is experiential; China's influence is conceptual

The data affirm that policy coherence and narrative clarity directly influence international perception, validating the tri-layered model's interdependence. Where Japan translates governance into accessible experience, China converts ideology into symbolic influence. The outcome demonstrates two successful but asymmetrical routes to nation branding.

Cross-Layer Interaction and Theoretical Interpretation

When the three layers, policy, narrative, perception, are analyzed together, a distinct structural contrast emerges. Japan's Tourism Nation operates through bottom-up diffusion, where regional diversity feeds into a unified yet flexible national brand. Local governments experiment with destination storytelling, and private sectors amplify them through design, media, and hospitality. The model's strength lies in adaptability and emotional resonance.

China's Cultural Confidence model, conversely, follows a top-down convergence logic. Central authorities define ideological boundaries and cultural themes, which local actors adapt into tourism projects. Its strength lies in message coherence and long-term nation-building alignment. Yet, this may constrain spontaneous creativity and global relatability.

When the three layers, policy, narrative, and perception, are analyzed together, a distinct structural contrast emerges, as illustrated in Figure 2, which maps the interactive flow of governance and communication in Japan and China.

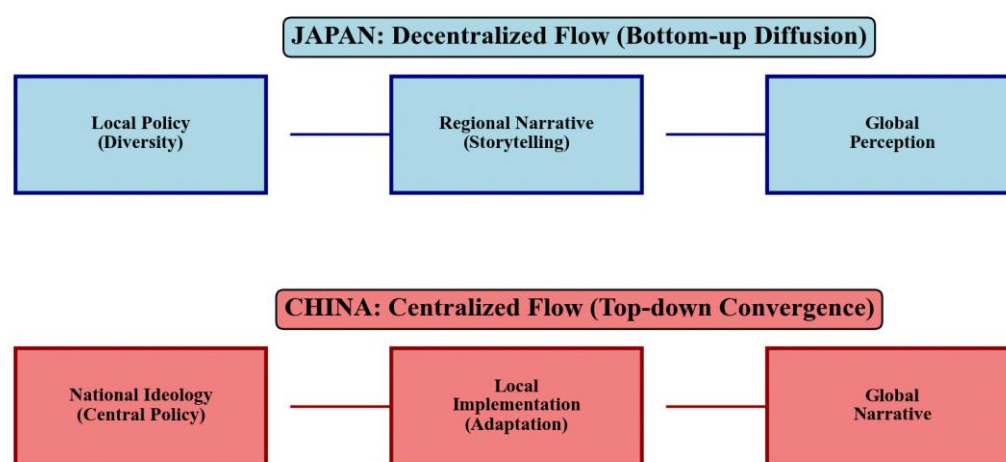


Figure 2. Interaction of Policy, Narrative, and Perception Layers.

Comparing these patterns reveals a complementary relationship: Japan excels in experiential accessibility, while China excels in symbolic authority. Their coexistence enriches the global discourse on how states balance market logic and ideological projection in cultural diplomacy.

Discussion and Contribution

The findings of this study reaffirm that tourism operates simultaneously as an economic mechanism and a symbolic system, while extending existing scholarship by revealing how governance philosophy mediates this dual nature. Unlike prior research that focused mainly on promotional outcomes, this analysis clarifies the causal relationship linking institutional design, cultural narrative, and global perception. The study advances theoretical innovation through the proposed tri-layered analytical model that integrates tourism governance, identity discourse, and international reception. Empirically grounded in two contrasting national contexts, the model transcends the conventional divide between economic pragmatism and cultural representation, offering a multidimensional explanation of soft-power production that incorporates both market logic and ideological intent. Practically, the comparison demonstrates that effective tourism diplomacy depends on structural efficiency and narrative authenticity, Japan excels in decentralized innovation and experiential branding, while China's strength lies in coherent cultural vision and ideological continuity. Future research could expand this framework through quantitative validation or comparative analysis of other cultural powers to further refine understanding of tourism's role in global identity construction.

CONCLUSION

This study comparatively analyzed Japan's Tourism Nation strategy and China's Cultural Confidence-based tourism development to reveal how both countries employ tourism as an instrument for national image building. The findings show that while both frameworks share the goal of enhancing soft power through tourism, their policy tools, strategic objectives, and image narratives differ substantially. Japan's Tourism Nation emphasizes policy decentralization, market incentives, and cross-sector partnership to stimulate inbound flows and regional revitalization, projecting an image of refinement, safety, and experiential modernity. In contrast, China's Cultural Confidence strategy relies on centralized coordination, cultural-heritage integration, and ideological framing to promote internal cohesion and civilizational continuity, conveying an image of moral authority and cultural depth.

The tri-layered analytical model proposed in this research, linking policy design, cultural narrative, and international perception, demonstrates how these two governance paradigms achieve distinct yet complementary outcomes. Japan's model translates economic openness into emotional appeal, while China's model transforms ideological vision into symbolic legitimacy.

Academically, this study contributes a comparative framework that bridges tourism policy analysis with cultural identity theory and soft-power research. Practically, it offers actionable insights for policymakers seeking to balance economic efficiency with cultural authenticity. Collaborative initiatives such as co-branded heritage routes, digital storytelling exchanges, or joint sustainable tourism programs could further integrate Japan's experiential branding with China's cultural depth. Future studies may extend this model quantitatively to assess how tourism-driven narratives continue to shape global perceptions of national identity in the evolving post-pandemic landscape.

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