

# White Paper on Tourism in Japan, 2024 (Summary)

---

**Japan Tourism Agency**  
**June 2024**

**The White Paper on Tourism is submitted to the Diet every year based on Article 8\* of the Tourism Nation Promotion Basic Law. It consists of the following three parts.**

\*Tourism Nation Promotion Basic Law (Act No. 117 of 2006) (Excerpt)  
(Annual Reports, etc.)

Article 8: The government must annually submit to the Diet a report on the state of tourism and on the policies it has taken to realize a tourism nation.

2. The government must annually hear the opinion of the Council on Transport Policy; must prepare a document outlining the policies it intends to implement, taking into consideration the state of tourism as pertains to the report in the preceding Paragraph; and must submit this document to the Diet.

## Part I: 2023 Tourism Trends

Chapter 1 Global Tourism Trends

Chapter 2 Tourism Trends in Japan

Chapter 3 Attracting Inbound tourists to Regional Areas and Expanding Consumption (Main Topic)

1. Current conditions of and issues for inbound tourism
2. Inbound tourism trends in Regional Areas, and examples of regional initiatives
3. Towards attracting intl. Tourists to Japan to local regions and expanding consumption

**Part II: Measures Taken in FY2023 / Part III: Measures to be Taken in FY2024**

# [Part 1] Tourism Trends

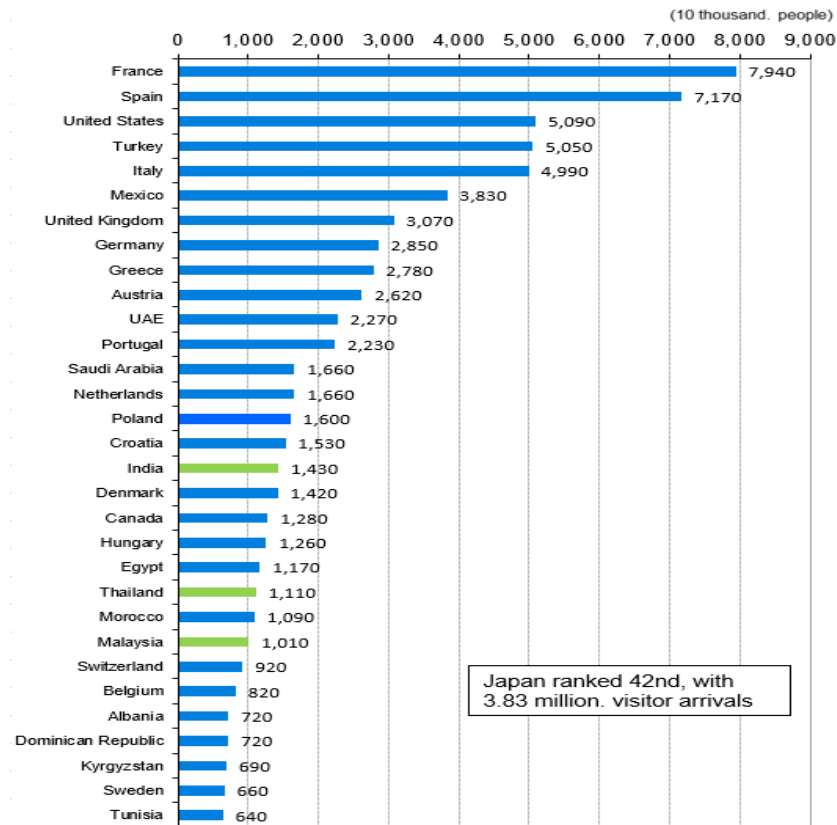
## Chapter 1: Global Tourism Trends; Chapter 2: Tourism Trends in Japan

○ Global Tourism Trends	.....	3
○ Tourism Trends in Japan (intl. Tourist arrivals)	.....	4
○ Tourism Trends in Japan (tourism consumption by intl. Tourists)	.....	5
○ Tourism Trends in Japan (domestic and overseas travel by Japanese travelers)	.....	6
○ Tourism Trends in Japan (overnight travel)	.....	7
○ Tourism Trends in Japan (situation for tourism businesses)	.....	8

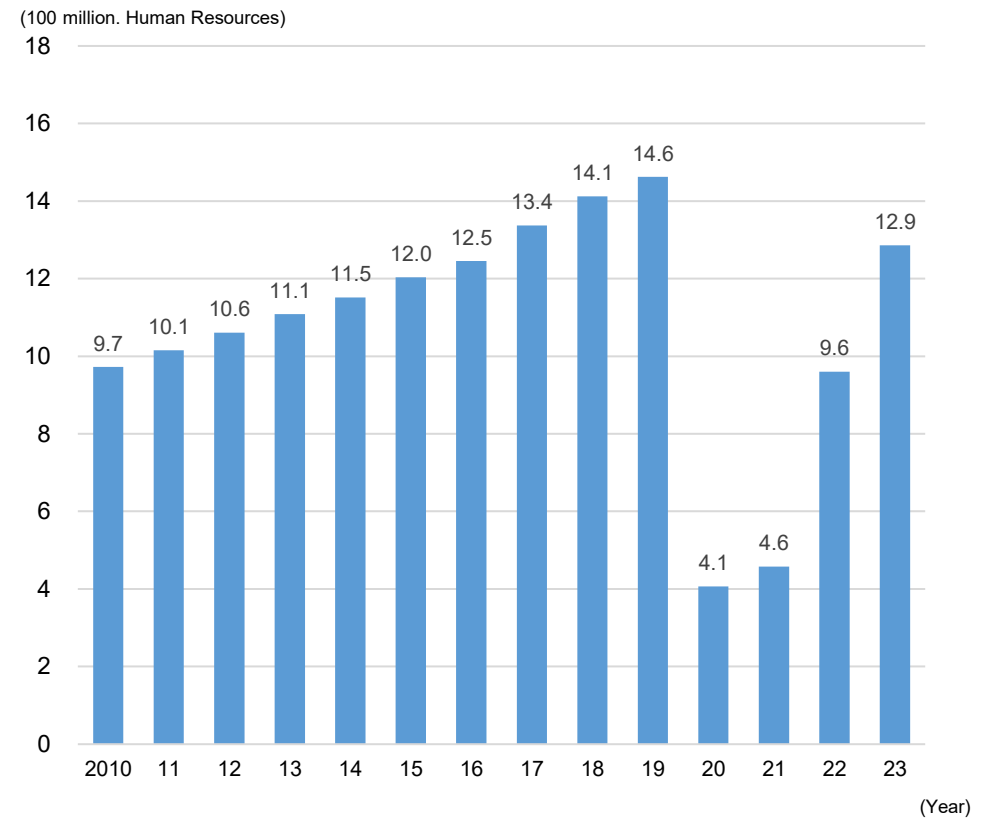
# [Part I] Global tourism trends

- In the ranking of international tourist Arrivals by Country/Region, Japan (3.83 million. arrivals) ranked 42nd in the world (5th in Asia). Although international Tourists in Japan have significantly recovered from 2021 (0.25 million. arrivals), they still lag behind the global trend.
- According to the World Tourism Organization( UN Tourism), there were **1,286 million international tourist arrivals in 2023** (up 33.9% from the previous year, but down 12.1% from 2019), which has recovered to approx. 90% of the pre-COVID-19 level in 2019.

(Figure I-3) International Tourist Arrivals by Country/Region Rankings(2022)



(Figure I-6) Trends of



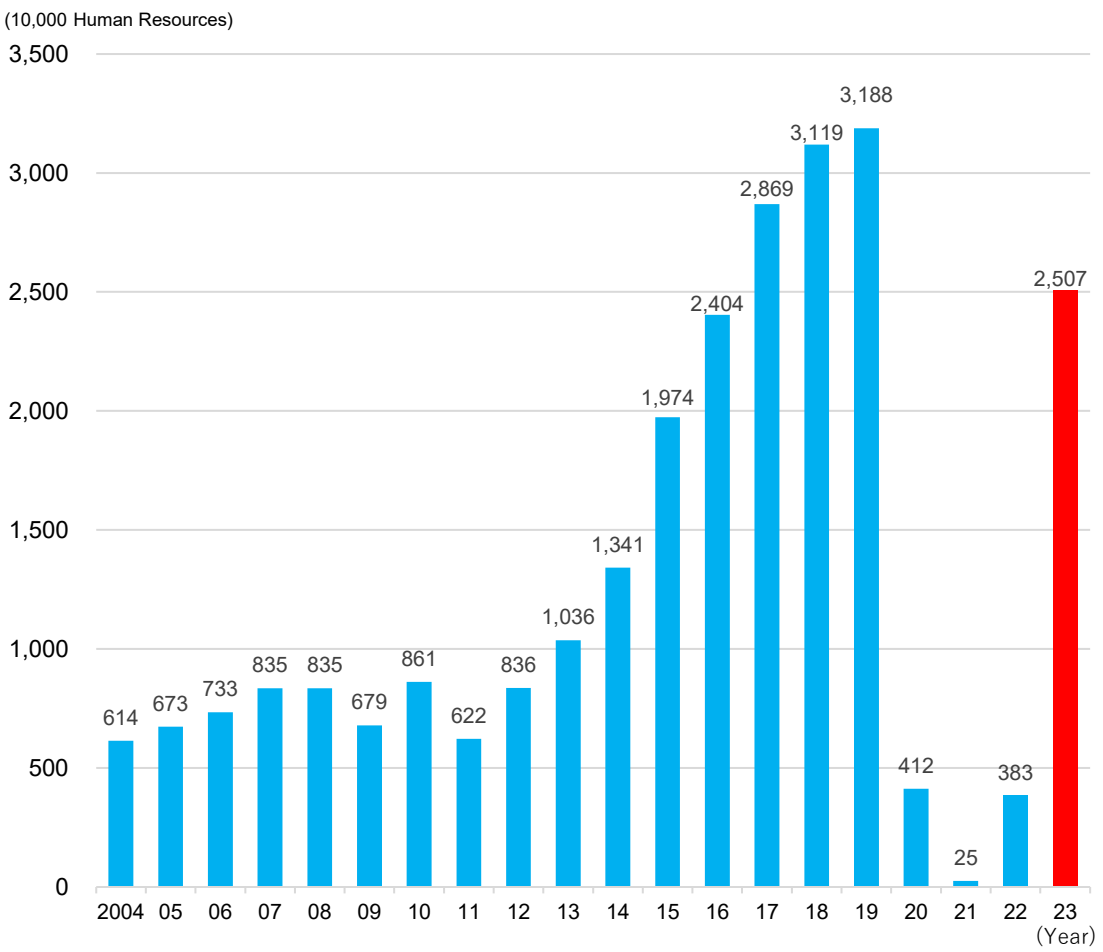
Source: Prepared by the Japan Tourism Agency (JTA) based on data published by UN Tourism.  
 Note 1: international. tourist arrivals are calculated and published based on different statistical standards by country/region. Therefore, their comparison requires special attention.  
 (For example, the number of foreign crew members (crew numbers) is included in the statistics for France, United States, etc.)  
 Note 2: The figures in this table provisional values, as of Jan. 2024.  
 Note 3: The numbers for Russia, the Czech Republic, China, Ireland, and Indonesia for 2022 have not yet been announced. But, due to the impact of the COVID-19 pandemic, these figures are expected to be significantly different from those before 2019. Therefore, Past figures are not adopted.  
 Note 4: the figures used in this table are principally the number of intl. Tourists staying in the country/region at least one night, except for Japan and Kyrgyzstan.  
 Note 5: The green bars in the graph show Asian countries/regions.  
 Note 6: Since the number of intl. tourist arrivals may be announced later or updated retroactively, the rankings may change depending on time when the figures are adopted.

Source: Prepared by the JTA based on UN Tourism's "Tourism Dashboard" (as of Jan. 2024).  
 Note 1: Figures are for international tourist arrivals.

# [Part I] Tourism Trends in Japan (The Number of International tourists)

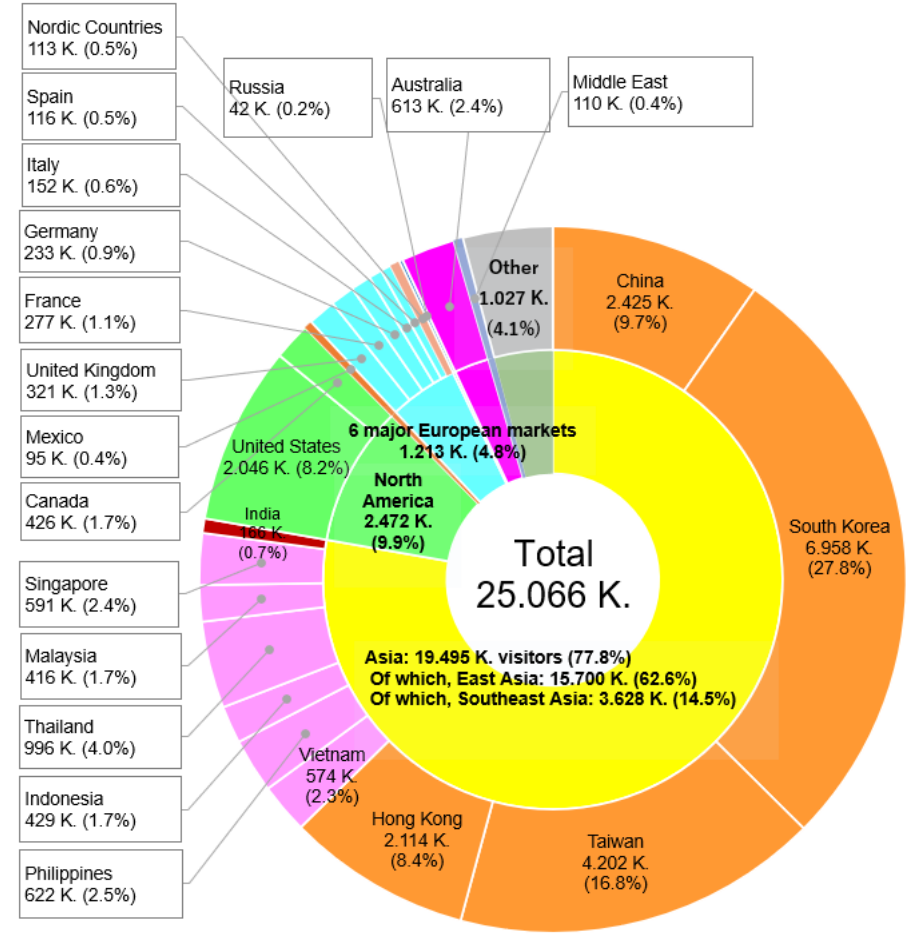
- In 2023 there were **approx.-25.07 million** international tourists in Japan, a 79% recovery compared to pre-COVID-19 levels (a 102% recovery when excluding China).
- Looking at breakdown by Country / Region for 2023, the largest share of international.Tourists were from Korea, followed by Taiwan, China, Hong Kong, and the the United States.

(Figure I-7) Trend in the Number of International tourists



Source: Prepared by the JTA based on data provided by the Japan National Tourism Organization (JNTO).

(Figure I-8) Breakdown of international.Tourist arrivals by Country/Region (2023)

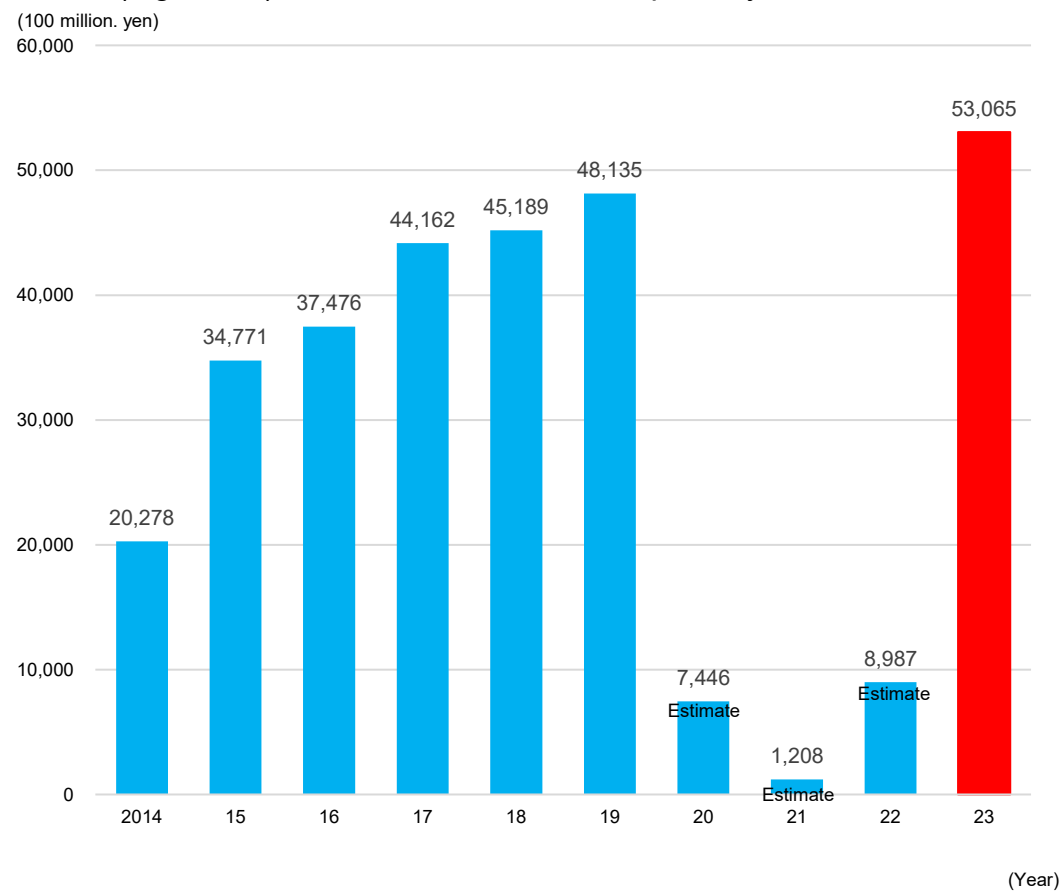


Source: Prepared by the JTA based on data provided by the Japan National Tourism Organization  
 Note 1: Numbers in parentheses are each figure as a share of all intl. Tourist arrivals in Japan.  
 Note 2: "Other" includes countries and regions in Asia and Europe that are not specified in the figure.  
 Note 3 Totals may not be exact due to rounding.

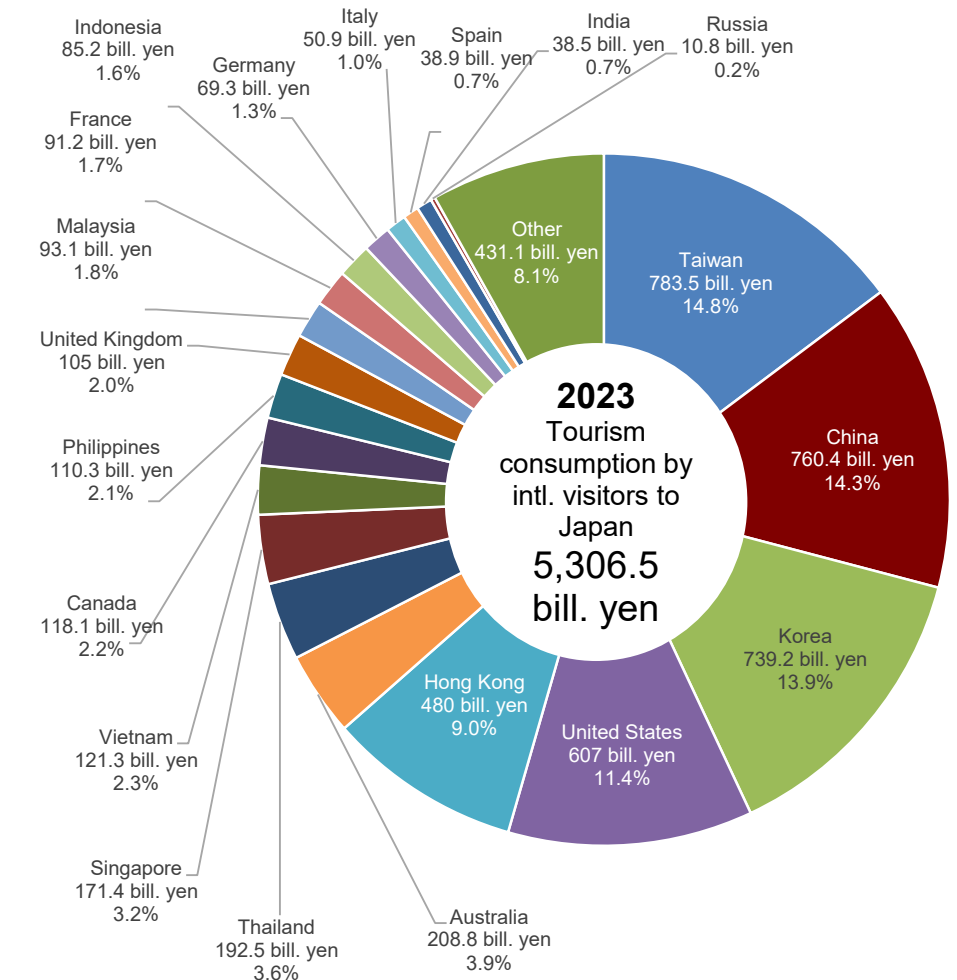
○ In 2023 tourism consumption by intl. Tourists to Japan reached a record high of 5.3065 trill. yen (up 10.2% from 2019).

○ Looking at the breakdown by country and region for 2023, the largest share of tourism consumption came from Taiwan, followed by China, Korea, the United States, and Hong Kong.

(Figure I-9) Trends in tourism consumption by intl. travelers



(Figure I-10) Breakdown of tourism consumption by country and region (2023)



Source: International Tourist Survey (JTA)

Note 1: Comparisons between 2017 and pre-2017 data and 2018 and later data need special attention, because until 2017, the survey focused mainly on travelers using airports; however, in light of the rapid increase in the number of cruise travelers, who tend to stay for shorter periods, the scope of the survey was expanded in 2018 to cover cruise travelers.

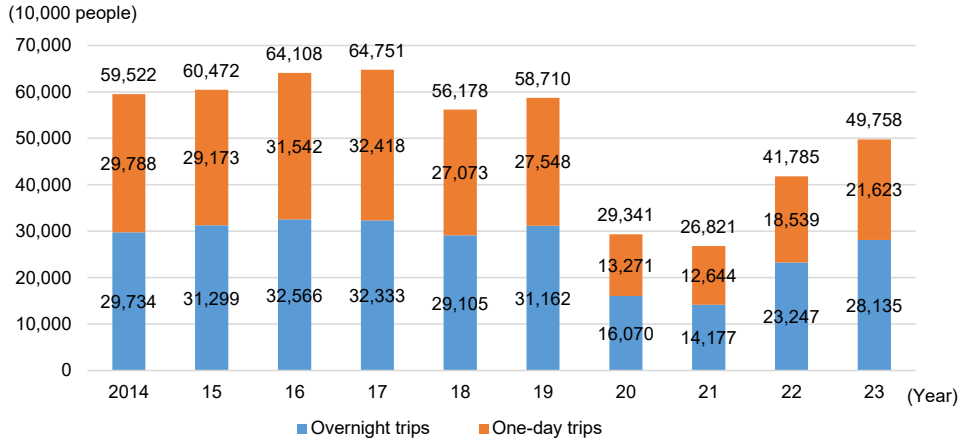
Note 2: Due to the COVID-19 pandemic, the surveys were suspended in 2020 for the Apr.-June, July-Sept., and Oct.-Dec. periods, and as such the 2020 annual value is an estimate that uses the Jan.-Mar. survey result. Additionally, the surveys were suspended in 2021 for the Jan.-Mar., Apr.-June, and July-Sept. periods, and as such the 2021 annual value is an estimate that uses the Oct.-Dec. survey result.

Note 3: Due to the impact of the COVID-19 pandemic, estimates of tourism consumption were published for the periods from Jan.-Mar., Apr.-June, and July-Sept. for 2022. Therefore, it should be noted that the annual values are also estimates.

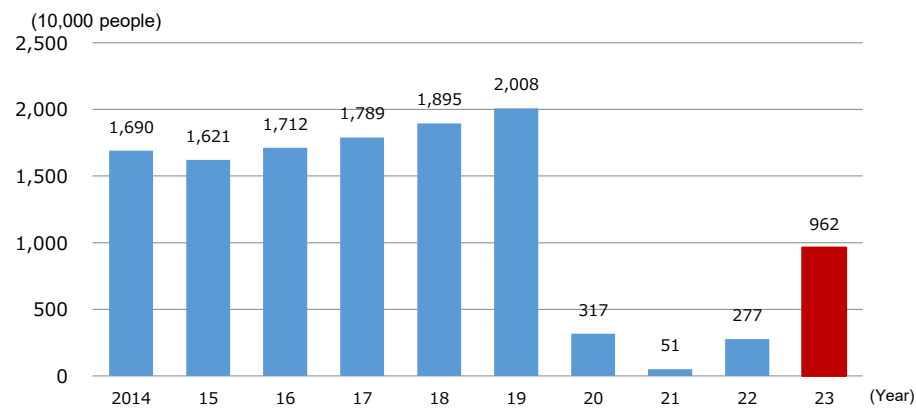
# [Part I] Tourism Trends in Japan (Domestic and Overseas Travel by Japanese Travelers)

- In 2023, total domestic guest nights by Japanese travelers numbered 281.35 million. (9.7% below 2019), and total domestic one-day trips numbered 216.23 million. (21.5% below 2019).
- Domestic tourism consumption by Japanese travelers in 2023 was 21.9 trillion yen (0.1% below 2019), having recovered to pre-COVID-19 levels.
- In 2023, the number of Japanese overseas travelers was 9.62 million. (52.1% below 2019).
- Total tourism consumption in Japan in 2023 was 28.1 trillion yen (0.5% above 2019).

(Figure I-16) Trends in total domestic guest nights and total domestic one-day trips by Japanese travelers

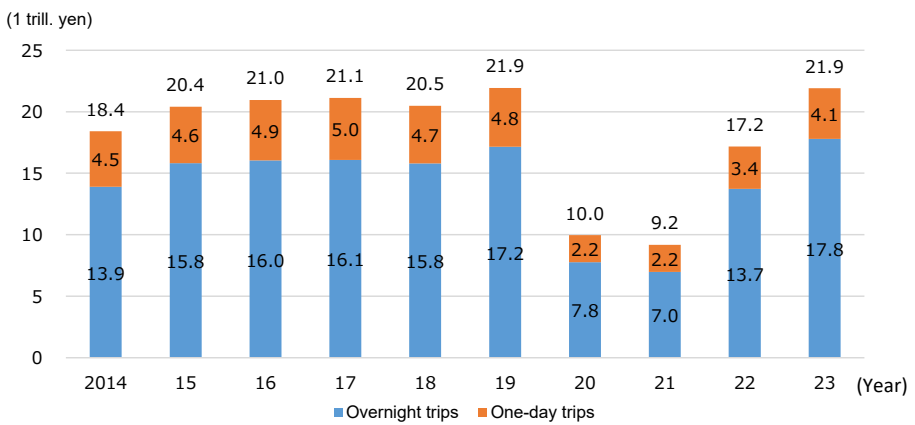


(Figure I-14) Trends in the number of Japanese overseas travelers



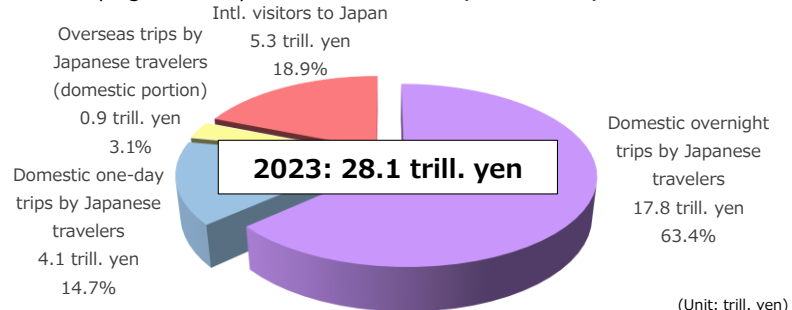
Source: Prepared by the JTA based on JNTO materials.

(Figure I-17) Trends in domestic tourism consumption by Japanese travelers



Source: National Tourism Survey, (JTA)

(Figure I-18) Tourism consumption in Japan



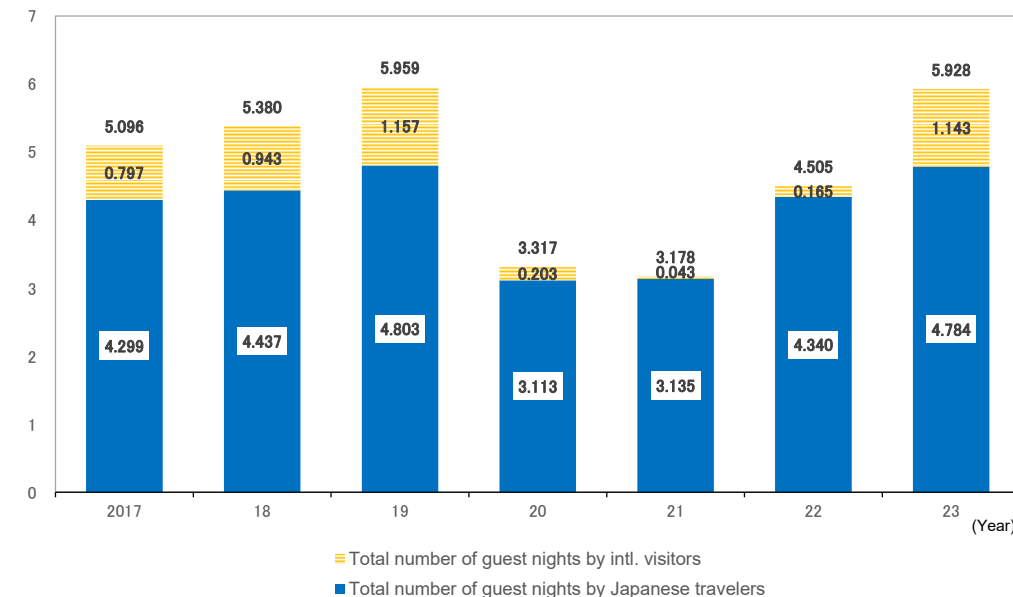
	2014	15	16	17	18	19	20	21	22	23
Domestic overnight trips by Japanese travelers	13.9	15.8	16.0	16.1	15.8	17.2	7.8	7.0	13.7	17.8
Domestic one-day trips by Japanese travelers	4.5	4.6	4.9	5.0	4.7	4.8	2.2	2.2	3.4	4.1
Overseas trips by Japanese travelers (domestic portion)	1.1	1.0	1.1	1.2	1.1	1.2	0.3	0.1	0.6	0.9
Intl. visitors to Japan	2.0	3.5	3.7	4.4	4.5	4.8	0.7	0.1	0.9	5.3
<b>Total</b>	<b>21.6</b>	<b>24.8</b>	<b>25.8</b>	<b>26.7</b>	<b>26.1</b>	<b>27.9</b>	<b>11.0</b>	<b>9.4</b>	<b>18.7</b>	<b>28.1</b>

Source: Prepared by the JTA based on the National Tourism Survey and the International Tourist Survey (JTA).  
 Note 1: "Overseas trips by Japanese travelers (domestic portion)" and "Intl. visitors to Japan" from 2020 to 2022 are estimates due to the impact of the COVID-19 pandemic.  
 Note 2: Because the figures have been rounded, the sum of the individual figures may not necessarily equal the total.

- In 2023 the total number of guest nights (by both Japanese and international tourists) generally recovered to pre-COVID-19 levels (down 0.5% from 2019). Of these, there were 478.42 million. guest nights by Japanese travelers (down 0.4% from 2019) and 114.34 million. guest nights by international tourists (down 1.1% from 2019).
- The room occupancy rate for 2023 was 57.4%, showing a recovery trend.

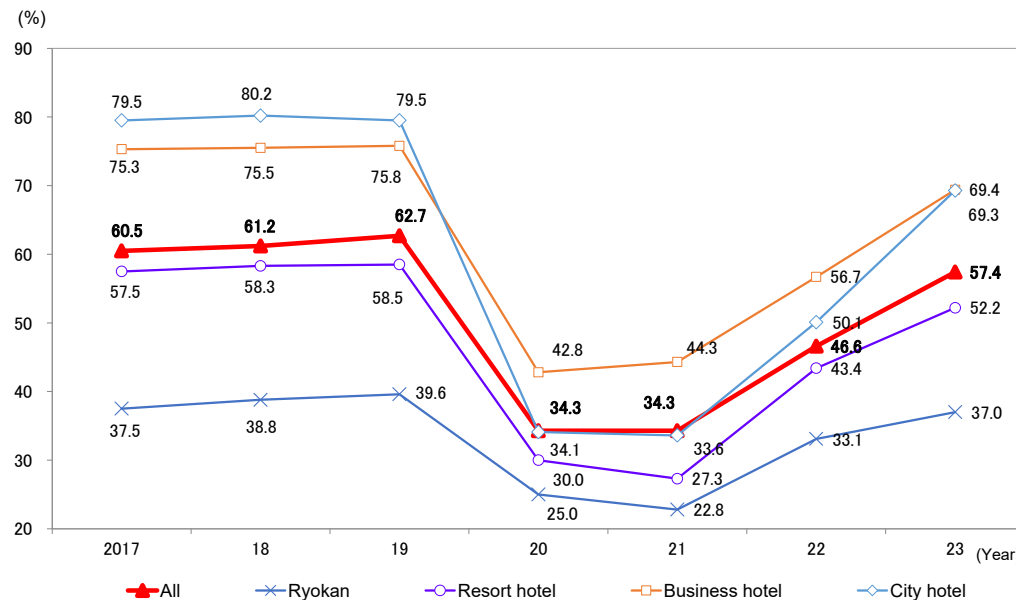
(Figure I-19) Trends in total number of guest nights by Japanese and international travelers

(100 million guest nights)



Source: Overnight Travel Statistics Survey, (JTA)  
 Note 1: 2023 figures are preliminary.  
 Note 2: The figures on the bars for each year in this graph are the total number of guest nights by Japanese and international travelers.

(Figure I-20) Trends in room occupancy rates by accommodation type



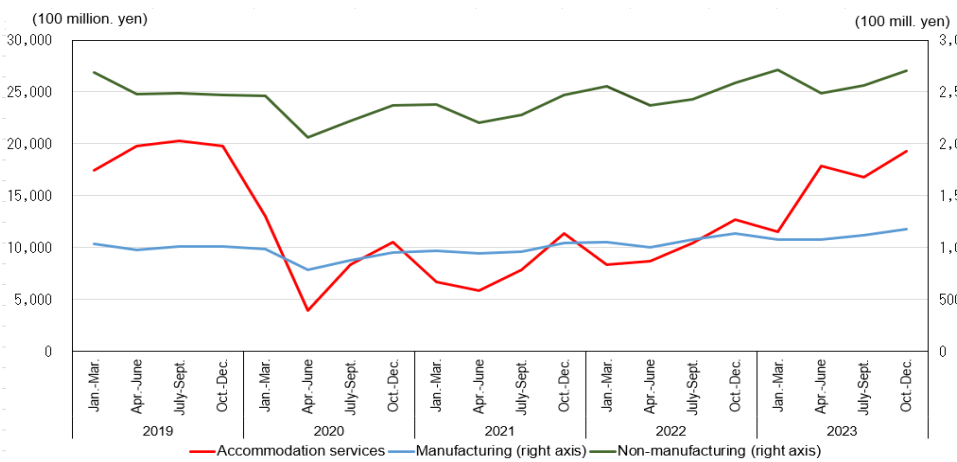
Source: Overnight Travel Statistics Survey, (JTA)  
 Note 1: 2023 figures are preliminary.



# [Part 1] Tourism Trends in Japan (Situation for Tourism Businesses)

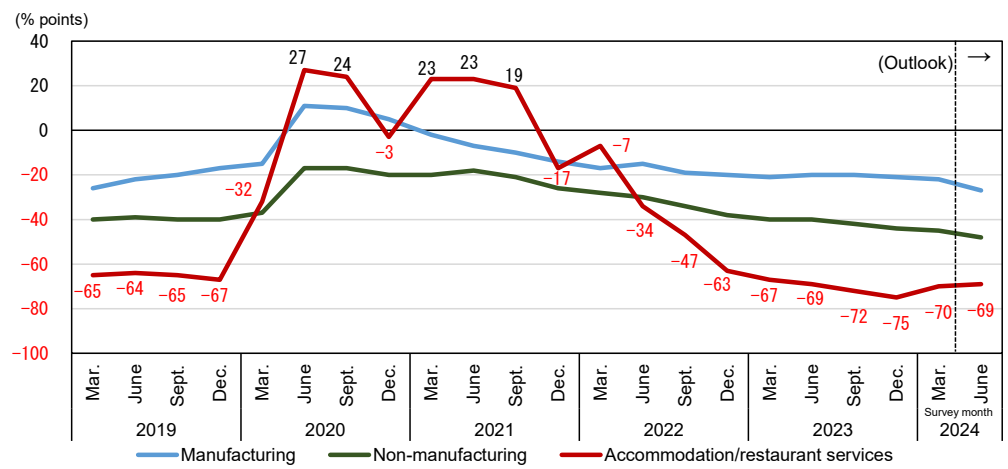
- Sales in accommodation services continues to show a gradual upward trend.
- Although tourism demand is recovery, supply-side issues such as labor shortages and low productivity in tourism areas and in the tourism industry have become apparent.

(Figure I-23) Trends in sales



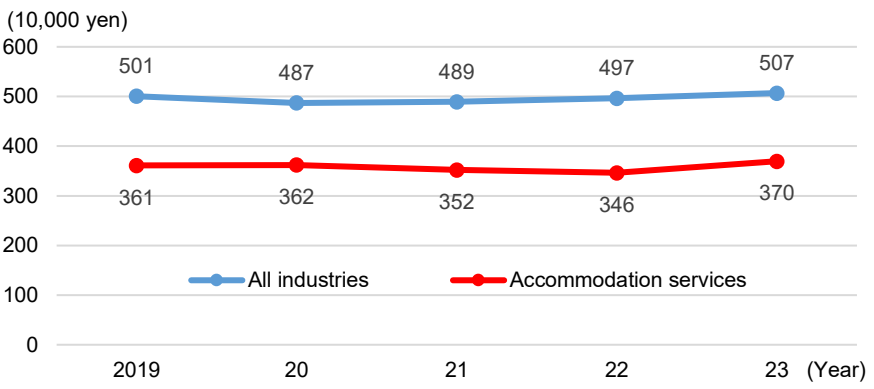
Source: *Financial Statements Statistics of Corporation by Industry* (Ministry of Finance)  
 Note 1: The "quarterly survey" in this survey covers profit-making corporations with capital, investments, or funds of 10 million yen or more, and this graph shows figures for all company sizes (large businesses and SMEs) with capital of 10 million yen or more.  
 Note 2: Industry classification conforms to the Japan Standard Industrial Classification.

(Figure I-24) Trends in employment judgement D.I for companies



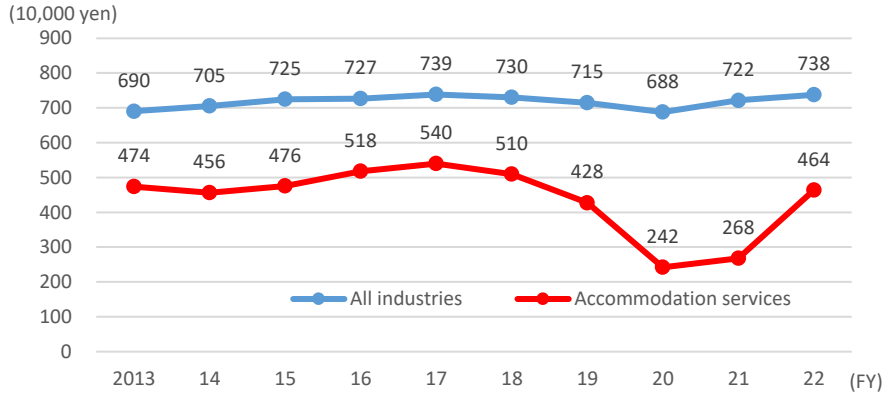
Source: *Short-term Economic Survey of Enterprises (Tankan)* (Bank of Japan)  
 Note 1: This survey covers private companies nationwide with capital of 20 million yen or more, and the figures in this graph include companies of all sizes (large companies, medium-sized companies, and SMEs).  
 Note 2: Industry classifications are based on the Japan Standard Industrial Classification, with manufacturing divided into 17 industries and non-manufacturing divided in 14 industries.  
 Note 3: The diffusion index (DI) for employment ([Excess] - [Shortage]), Japan. The outlook for June 2024 was given in March 2024.

(Figure I-26) Trends in wages (total annual wage payments)



Source: Prepared by the JTA based on the *Basic Survey on Wage Structure* (Ministry of Health, Labour and Welfare)  
 Note 1: This survey covers privately run businesses that employ five or more regular employees (workers employed without a set term or workers employed for a set term of one month or more) (for establishments with 5 to 9 workers, only those with a company size of 5 to 9 workers are included) and public businesses that employ 10 or more regular employees, and the figures in this graph are for total enterprise size (10 or more regular employees).  
 Note 2: Industry classification conforms to the Japan Standard Industrial Classification  
 Note 3: Wage = monthly salary paid in cash to regular workers (yen) x 12 (month) + annual bonus and other special salaries (yen)  
 Note 4: The estimation method changed in 2020 and the effects of the valid response rate were incorporated in the estimation method.

(Figure I-27) Trends in labor productivity



Source: Prepared by the JTA based on the *Financial Statements Statistics of Corporation by Industry* (Ministry of Finance)  
 Note 1: The "annual survey" in this survey covers for-profit corporations, and this graph shows figures for companies of all sizes (large companies and SMEs).  
 Note 2: Industry classification conforms to the Japan Standard Industrial Classification.  
 Note 3: Labor productivity is calculated by dividing added value by the average number of employees during the period. The figures for all industries exclude the financial and insurance industries.

# [Part 1] Tourism Trends

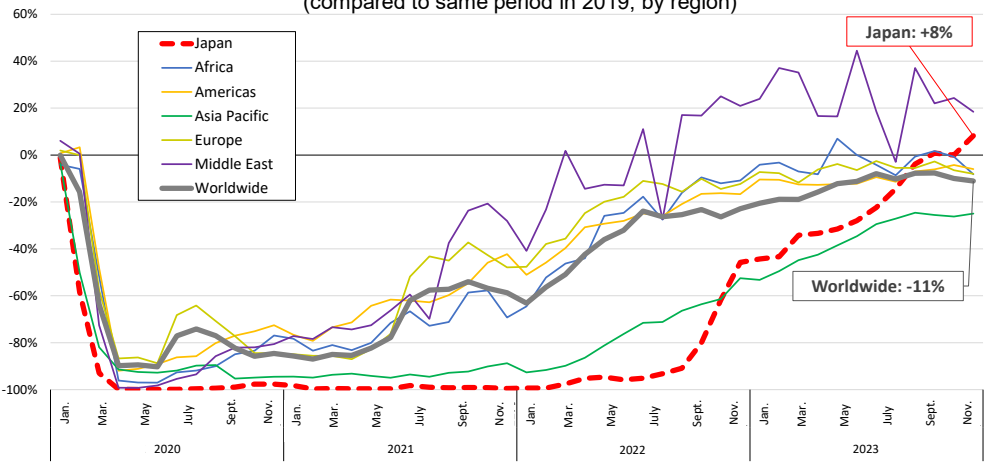
## Chapter 3: Attracting Inbound tourists to Regional Areas and Expanding Consumption (Main Topic)

<b>Section 1: Current conditions of and issues for inbound tourism</b> .....	10
○ Recovery in tourism demand (number of travelers and tourism consumption)	
○ Trends in tourism consumption by intl.Tourists	
○ Situation regarding attracting intl.Tourists to regional areas	
<b>Section 2: Inbound tourism trends in Regional areas, and examples of regional initiatives</b> .....	13
○ Trends in inbound tourism in Regional areas (Comparison with Japan's 3 major metropolitan areas, and situation by prefecture)	
○ Examples of regional initiatives	
<b>Section 3: Towards attracting intl.Tourists to Japan to local regions and expanding consumption</b> .....	19

# Recovery in Tourism Demand (Number of tourists and Tourism Consumption)

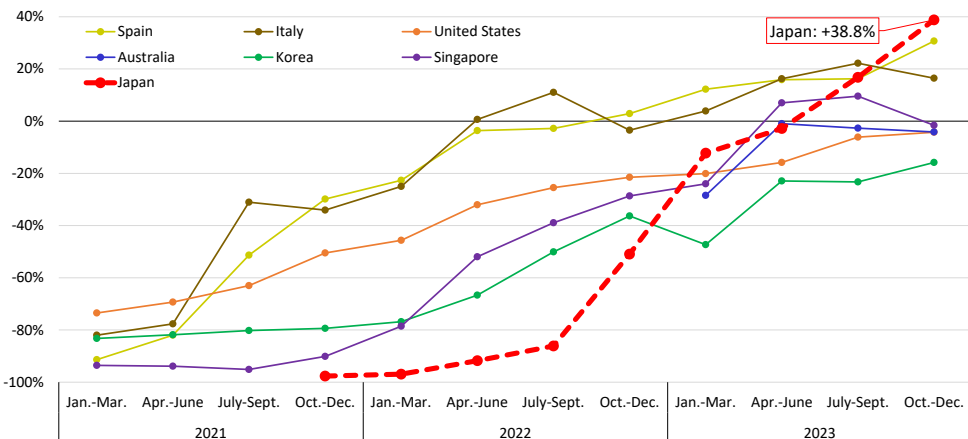
- The number of intl. Tourists and tourism consumption in major countries and regions has generally recovered to pre-COVID-19 levels. **Travel to Japan rapidly recovered, particularly from the second half of 2022 onwards.**
- **Looking at the number of outbound travelers from Korea, Japan was the top travel destination both before and after the COVID-19 pandemic** (note that the growth rate was boosted by the deterioration of Japan-Korea relations in the second half of 2019). **For the United States as well, Japan is the top travel destination in Asia, with a higher growth rate than major travel destinations such as Mexico and Canada.**
- **The yen-dollar exchange rate at the end of 2023 was about 25% weaker than in 2019**, and it is thought that the impact of the exchange rate has also helped to boost the recovery of travel to Japan.

(Figure I-32) Trends in intl. Tourist numbers (compared to same period in 2019, by region)



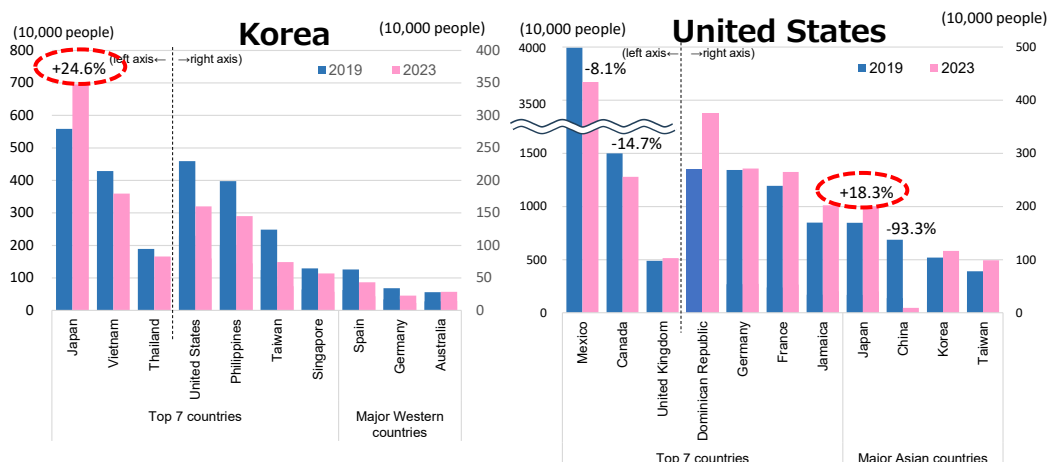
Source: Prepared by the JTA based on UN Tourism data (as of March 2024) and Statistics on International tourists to Japan by the JNTO.

(Figure I-35) Trends in inbound consumption for major countries (compared to the same period in 2019)



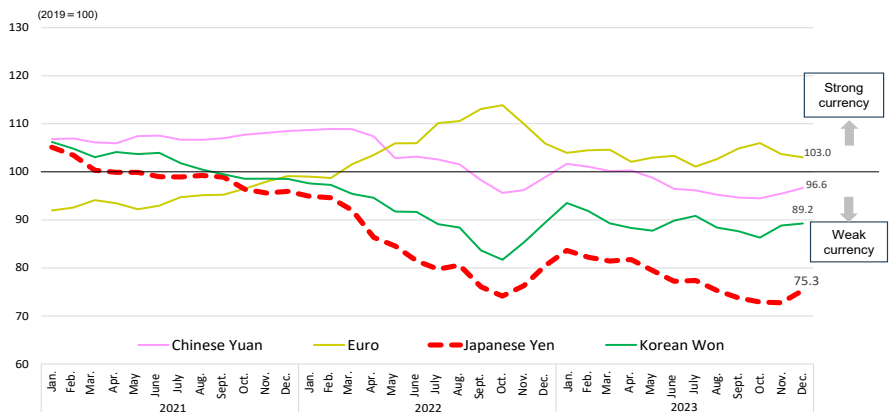
Source: Prepared by the JIA based on the International Tourist Survey (JIA) and tourism statistics from each country.  
 Note 1: Comparison of inbound consumption in local currency for the same periods in 2019.  
 Note 2: In Japan, the International Tourist Survey was suspended from the Apr.-June 2020 period until the July-Sept. 2021 period due to the impact of the COVID-19 pandemic, so there is no data for this period. There is no data for Australia until the October-December 2022 period.

(Figure I-34) Number of outbound travelers by destination for Korea and the United States



Source: Prepared by the JTA based on data from the Korea Tourism Organization and the U.S. International Trade Administration.  
 Note 1: Data for China is not released by Korea.  
 Note 2: The figures for these graphs are comparisons between 2023 and 2019.

(Figure I-2) Trends in exchange rates for various currencies against USD

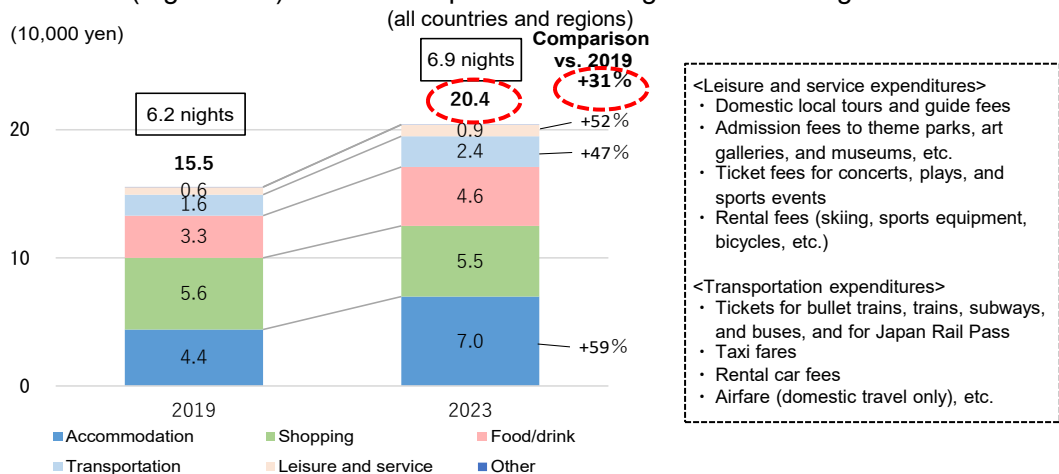


Source: Prepared by the JTA based on International Monetary Fund (IMF) data.  
 Note 1: Monthly averages calculated from the daily exchange rates of each country's currency against USD. The 2019 average is set at 100.  
 Note 2: The figures in this graph are provisional as of April 2024.

# Trends in Tourism Consumption by Intl. Tourists

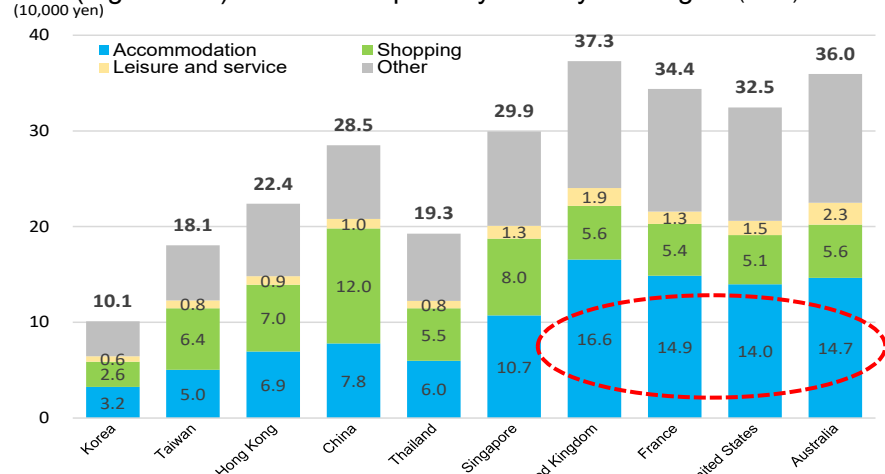
- In 2023, the average tourism expenditures (unit consumption) for intl. Tourists coming to Japan for tourism and leisure purposes increased by approx. 30% compared to 2019. In particular, accommodation expenditures, leisure and service expenditures, and transportation expenditures saw significant increases, and there are signs of growth in experiential consumption.
- Accommodation expenditures are high in Europe, the United States, and Australia, where people tend to stay longer, which pushes up overall consumption unit consumption.
- Looking at leisure and service expenditures, trends vary by country and region, with Asian tourists spending more on theme parks and European and American tourists spending more on art galleries and museums.
- The proportion of leisure and service expenditures is still low when compared to the United States, and there is room for further growth through the creation of high added value experiential tours that take advantage of the charms of each region.

(Figure I-42) Unit consumption and average number of nights



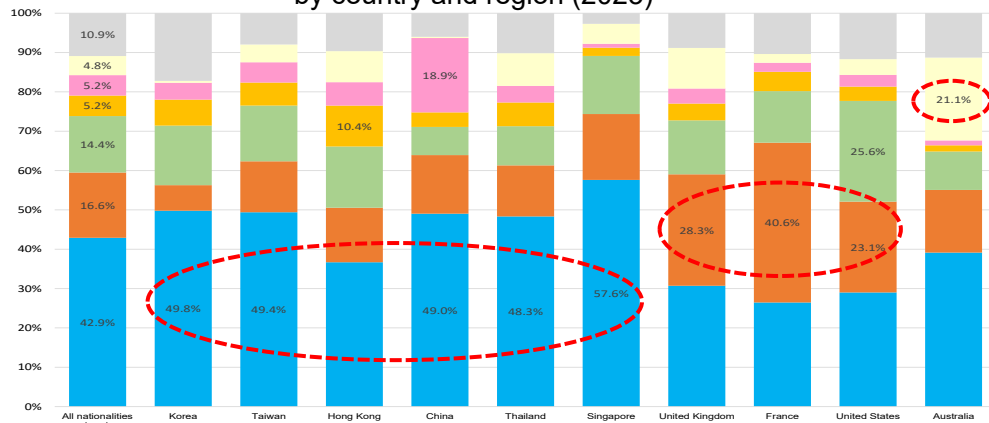
Source: Prepared from the *International Tourist Survey* (JTA) (tourism and leisure purposes; 2019 and 2023).  
 Note 1: The numbers in the boxes indicate the average number of guest nights.

(Figure I-44) Unit consumption by country and region (2023)



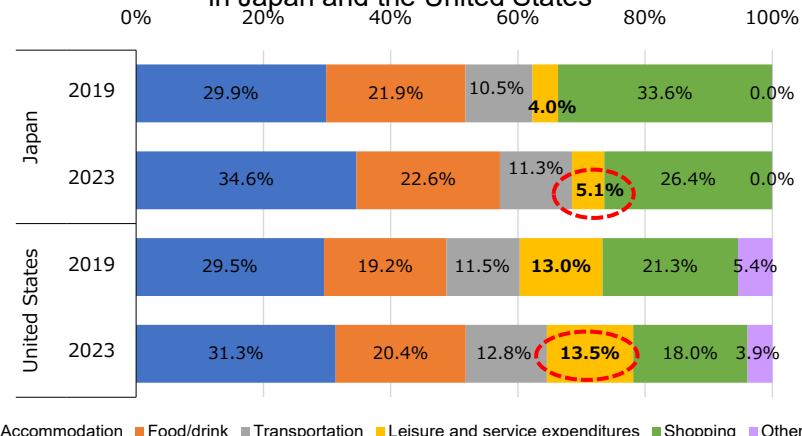
Source: Prepared from the *International Tourist Survey* (JTA) (tourism and leisure purposes; 2023).

(Figure I-45) Breakdown of leisure and service expenditures by country and region (2023)



Source: Prepared from the *International Tourist Survey* (JTA) (tourism and leisure purposes; 2023).  
 Note 1: "Other" is the sum of "Golf course and sports facility usage fees," "sports spectating," "massage and medical expenses," "exhibition and convention participation fees," "rental fees (excl. car rental fees)," and "leisure and service expenditures."

(Figure I-46) Proportion of inbound spending by expense item in Japan and the United States



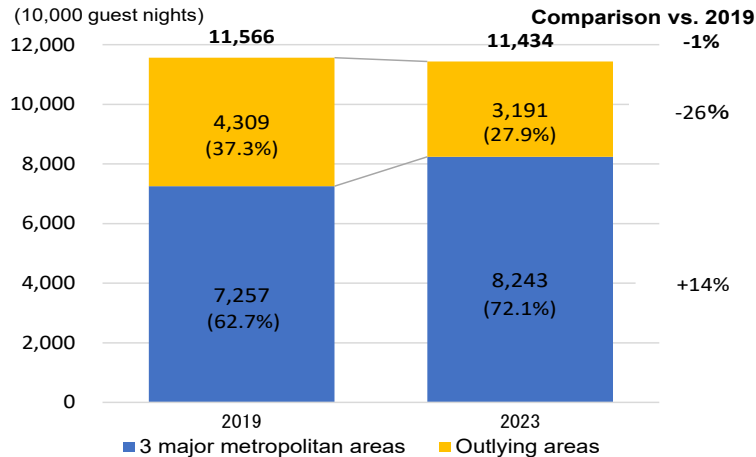
Source: Prepared by the JTA based on the *International Tourist Survey* (JTA) and data from the U.S. International Trade Administration.

Note 1: For the United States, the sum of "Entertainment and Recreation" and "Medical Services" is used as "Leisure and service expenditures," and the sum of "Additional Air Transportation" and "Ground Transportation" is used as "Transportation fees."

# Situation Regarding Attracting Intl. Tourists to Regional Areas

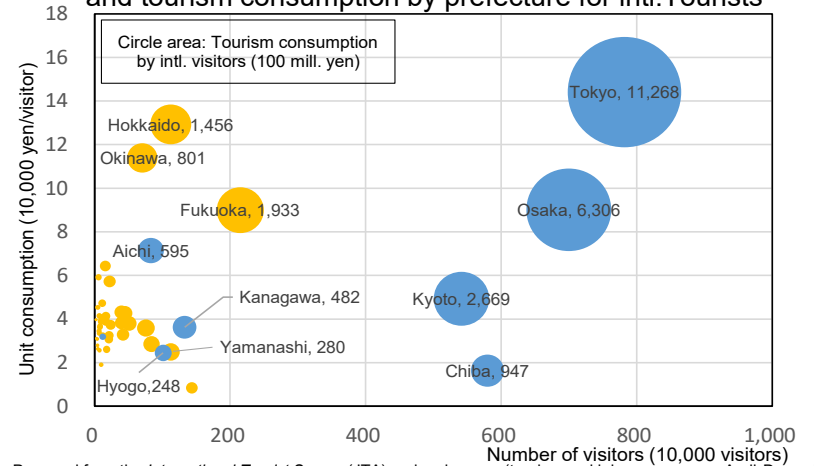
- **Approx. 70% of the total number of guest nights by intl. Tourists are concentrated in Japan's 3 major metropolitan areas, and the amount of tourism consumption by intl. Tourists is notably high in Tokyo, Osaka, and Kyoto, so inbound demand tends to be unevenly distributed depending on the region.**
- **Travelers from around the world are highly interested in sustainable tourism and in contributing to local communities. In addition to Japanese food and shopping, there is also growing interest in traditional Japanese culture and everyday life. In order to attract more tourists to regional areas, it is necessary to improve and promote the attractiveness of each region by taking advantage of their unique tourism resources.**

(Figure I-49) Proportion of the total number of guest nights by intl. Tourists in the 3 major metropolitan areas and Regional areas



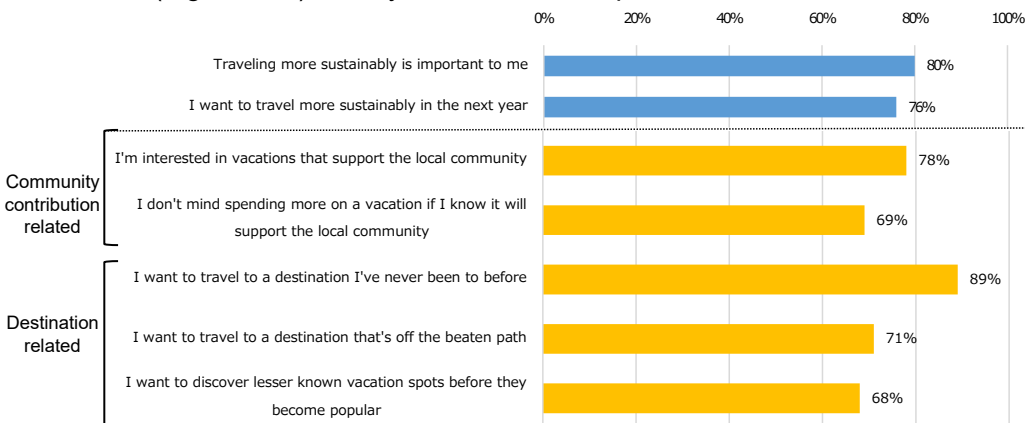
Source: *Overnight Travel Statistics Survey (JTA)*  
 Note 1: 2023 figures are preliminary.  
 Note 2: The 3 major metropolitan areas are the eight prefectures of Tokyo, Kanagawa, Chiba, Saitama, Aichi, Osaka, Kyoto, and Hyogo, and Regional areas are the prefectures outside the 3 major metropolitan areas.

(Figure I-50) Number of tourists, unit expenditures, and tourism consumption by prefecture for intl. Tourists



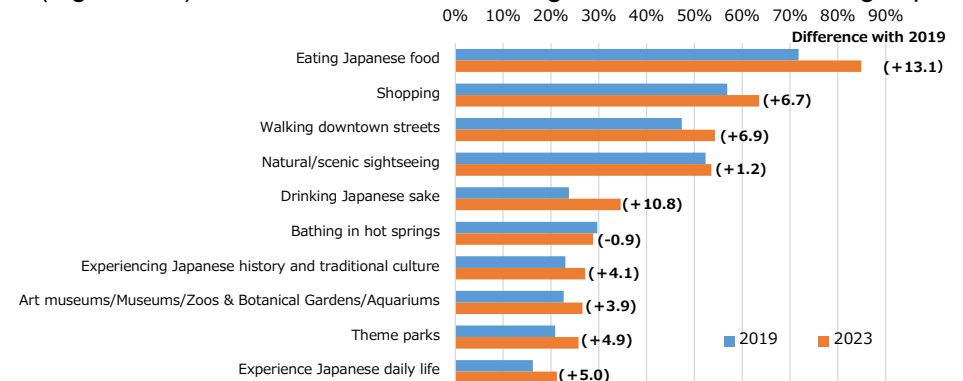
Source: Prepared from the *International Tourist Survey (JTA)* regional survey (tourism and leisure purposes; April-December 2023 (reference values)).  
 Note 1: In the *International Tourist Survey*, "regional surveys" are conducted to understand consumption trends by prefectures visited and are separate from the "national survey" that is used to understand the consumption trends of intl. Tourists as a whole and by country and region. "Tourism consumption by intl. Tourists," which is the total amount of consumption in Japan by all intl. Tourists to Japan, was estimated from the national survey.  
 Note 2: The "regional survey" was suspended from the Apr.-June 2020 period until the Jan.-Mar. 2023 period due to the impact of the COVID-19 pandemic, so the 2023 calendar year data does not include data for the Jan.-Mar. period.  
 Note 3: "Number of tourists" includes one-day trips as well as visits with guest nights to each prefecture. "Unit consumption" is travel expenditures per person in each prefecture by tourists to the prefecture (incl. one-day trips).

(Figure I-38) Survey results on travel preferences of intl. Tourists



Source: Prepared by the JTA based on the *Sustainable Travel Report 2023* by Booking.com and on the *2023 Global Travel Trends Report* by American Express Travel.  
 Note 1: The *Sustainable Travel Report 2023* was conducted in February 2023, targeting 33,228 Human Resources from 35 countries and regions around the world.  
 Note 2: The *2023 Global Travel Report* was conducted in February 2023, targeting Human Resources in seven countries (incl. Japan, the United States, and Australia) who travel by plane at least once a year.

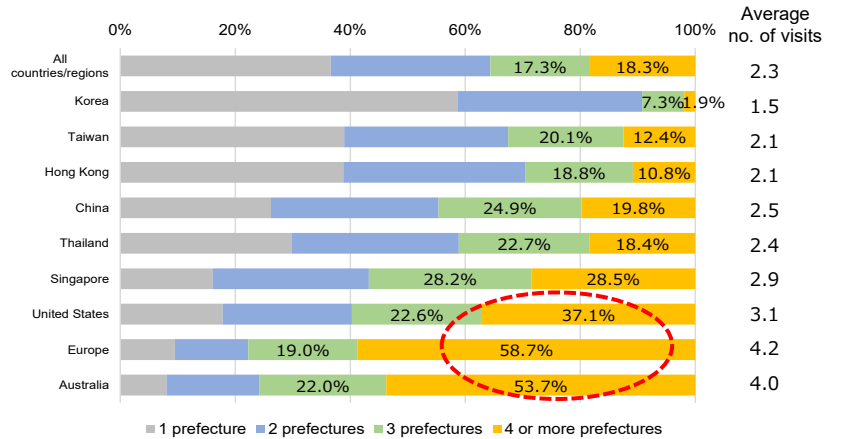
(Figure I-39) What intl. Tourists are looking forward to before visiting Japan



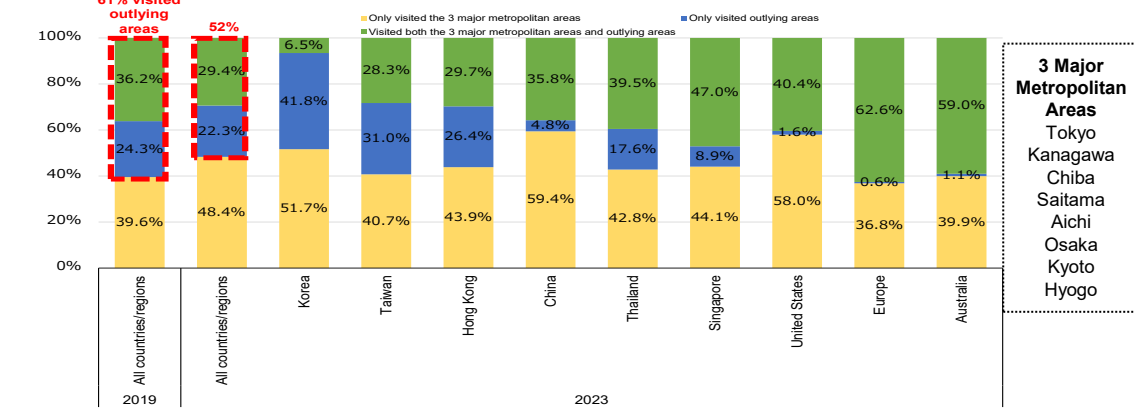
Source: Prepared from the *International Tourist Survey (JTA)* (tourism and leisure purposes; 2019 and 2023).

- European, American, and Australian tourists stay longer than tourists from other countries and regions, and also visit more prefectures.
- **Tourists to Regional areas** (incl. one-day trips to Regional areas) **account for approx. 50% of all intl. Tourists visiting Japan.** Asian tourists account for a high proportion of repeat tourists to Japan, and a high proportion of those who only visit Regional areas. On the other hand, tourists from Europe and Australia, etc. are more likely to visit both the 3 major metropolitan areas and Regional areas. \* (\*Note that, due to restrictions on direct flights to Regional areas, European, American, and Australian tourists must visit at least one of the 3 major metropolitan areas when they enter and exit the country, even if their trip is to an Regional area.)
- **Tourists only travelling to Regional areas** stayed for an average 4.2 guest nights, and **their unit consumption was 130,000 yen.** For tourists who visited both the 3 major metropolitan areas and Regional areas, **Tourists who stayed overnight** in Regional areas spent approx. 70,000 yen, which is approx. 11 times as much as **visitors who just made one-day trips** to Regional areas. **Promoting "stays" in Regional areas has a large effect on inducing consumption in outlying areas.**

(Figure I-53) Number of prefectures visited, by country and region (2023)

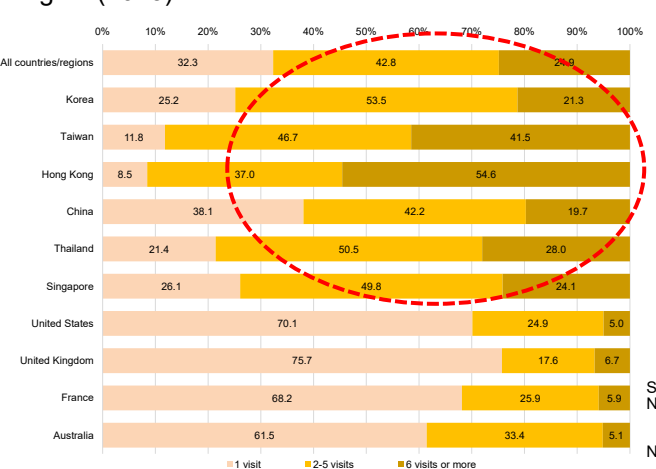


(Figure I-54) Breakdown of visit patterns for the 3 major metropolitan areas and Regional areas



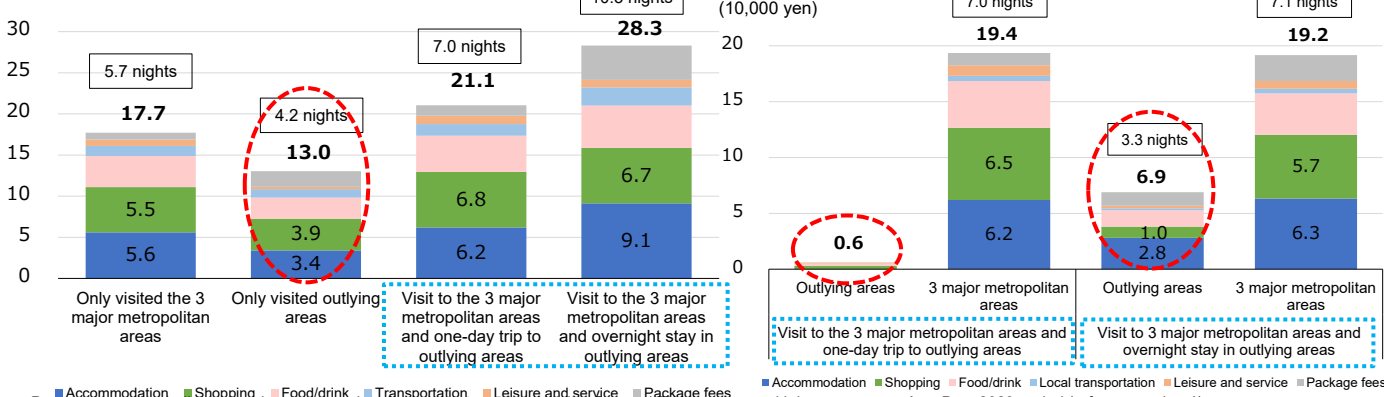
Source: Prepared by using individual regional survey data from the *International Tourist Survey* (JTA) (tourism and leisure purposes; Apr.-Dec. 2019 period and Apr.-Dec. 2023 period (reference values)).  
 Note 1: "Visits" include one-day trips to the 3 major metropolitan areas and Regional areas as well as guest nights.

(Figure I-55) Number of visits to Japan by country and region (2023)



Source: Prepared by using individual data from the *International Tourist Survey* (JTA) (tourism and leisure purposes; 2023)

(Figure I-56) Unit consumption and average number of guest nights by visit pattern (all countries and regions, 2023) (10,000 yen)

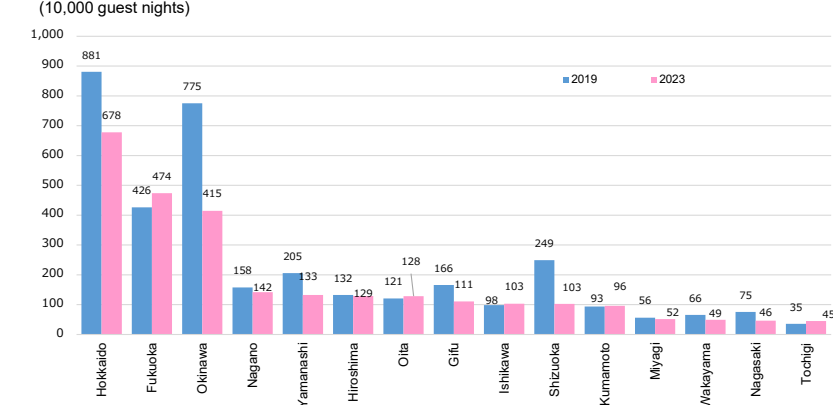


Source: Prepared by using individual regional survey data from the *International Tourist Survey* (JTA) (tourism and leisure purposes Apr.-Dec. 2023 period (reference values)).  
 Note 1: In the *International Visitor Survey*, "regional surveys" are conducted to understand consumption trends by prefectures visited and are separate from the "national survey" that is used to understand the consumption trends of intl. visitors as a whole and by country and region. "Tourism consumption by intl. visitors," which is the total amount of consumption in Japan by all intl. visitors to Japan, was estimated from the national survey.  
 Note 2: The "regional survey" was suspended from the Apr.-June 2020 period until the Jan.-Mar. 2023 period due to the impact of the COVID-19 pandemic, so the 2023 calendar year data does not include data for the Jan.-Mar. period.  
 Note 3: "Visits" includes one-day trips as well as visits with a guest night to the 3 major metropolitan areas and outlying areas. From April to December 2023, visitors making one-day trips accounted for 0.1% of all intl. visitors to Japan.

# Trends in Inbound Tourism in Regional Areas (Situation by Prefecture)

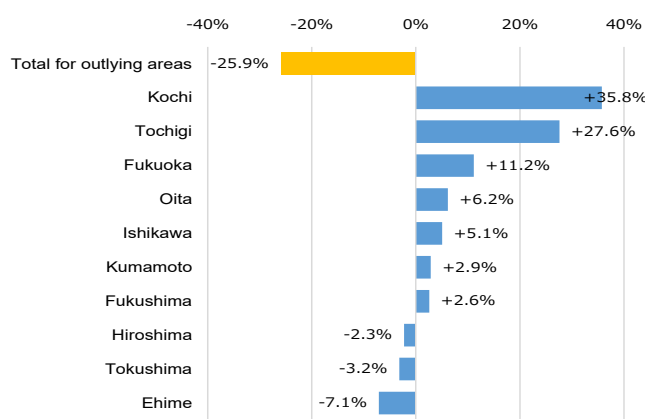
- Looking at the situation by prefecture in Regional areas, **the total number of guest nights and tourism consumption by intl. Tourists are both concentrated in Hokkaido, Fukuoka, and Okinawa.**
- Compared to pre-COVID-19 levels, the total number of guest nights by intl. Tourists has **increased in Kochi, Tochigi, and Kyushu prefectures**, and, when further narrowing this down to European, American, and Australian tourists, the rate of increase is high in Okinawa, Ishikawa, and Shikoku prefectures, **so the situation for attracting tourists and the degree of recovery vary by prefecture.**

(Figure I-57) Total number of guest nights in Regional areas by intl. Tourists, by prefecture (top 15 prefectures in 2023)



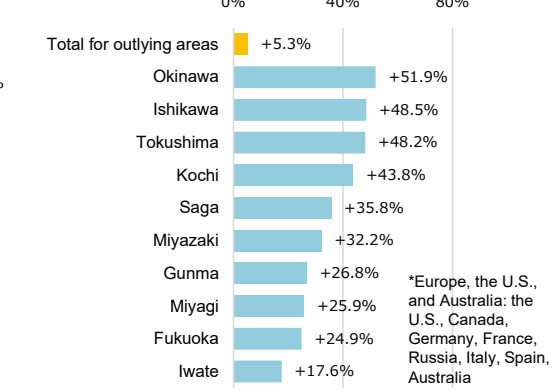
Source: Overnight Travel Statistics Survey (JTA)  
Note 1: 2023 figures are preliminary.

(Figure I-58) Comparison vs. 2019 of total number of guest nights by intl. Tourists (2023; top 10 prefectures)



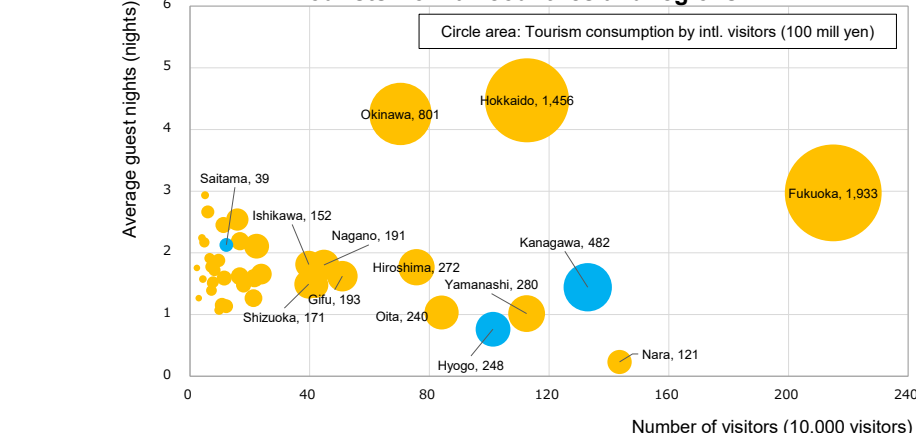
Source: Overnight Travel Statistics Survey (JTA)  
Note 1: 2023 figures are preliminary.

(Figure I-60) Comparison vs. 2019 of total number of guest nights from Europe, the United States, and Australia (2023; top 10 prefectures)



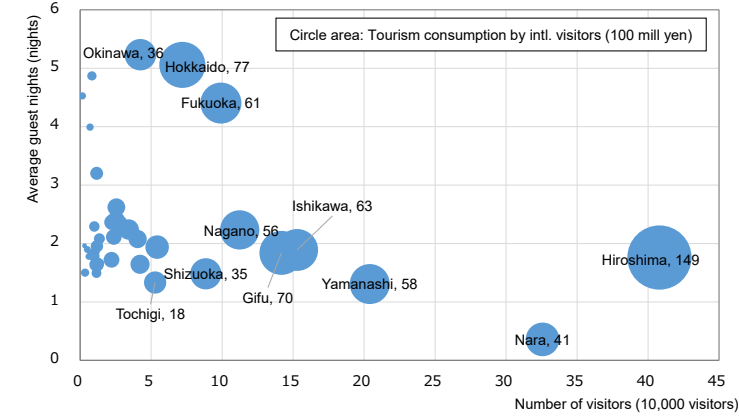
Source: Overnight Travel Statistics Survey (JTA)  
Note 1: 2023 figures are preliminary.  
Note 2: Figures are for facilities with 10 or more employees  
\*Europe, the U.S., and Australia: the U.S., Canada, Germany, France, Russia, Italy, Spain, Australia

(Figure I-61) Number of tourists, average number of nights, and consumption amounts by intl. Tourists travelling to Regional areas, by prefecture (2023)



Source: Prepared by using individual regional survey data from the International Tourist Survey (JTA) (tourism and leisure purposes; Apr.-Dec. 2023 period (reference values).  
Note 1: In the International Tourist Survey, "regional surveys" are conducted to understand consumption trends by prefectures visited and are separate from the "national survey" that is used to understand the consumption trends of intl. visitor tourists as a whole and by country and region; the designs for the two surveys are different. "Tourism consumption by intl. Tourists," which is the total amount of consumption in Japan by all intl. Tourists to Japan, was estimated from the national survey. The "regional survey" was suspended from the Apr.-June 2020 period until the Jan.-Mar. 2023 period due to the impact of the COVID-19 pandemic, so the 2023 calendar year data does not include data for the Jan.-Mar. period.  
Note 2: "Number of tourists" includes tourists who make one-day trips to each prefecture, as well as tourists who have a guest night. "Average number of nights" in each prefecture is the average number of nights spent by tourists travelling to that prefecture (incl. one-day trips). Tourists making one-day trips are counted as 0 nights.  
Note 3: The left figure (all countries and regions) includes, for reference, some prefectures (Kanagawa, Hyogo, and Saitama prefectures) that are in the 3 major metropolitan areas, in addition to the prefectures in Regional areas. "Europe, the U.S., and Australia" in the right figure is the total of the U.K., Germany, France, Russia, Spain, the U.S., and Australia.

Tourists from Europe, the United States, and Australia



# Towards Attracting Intl. Tourists to Japan to Regional Areas and Expanding Consumption (Examples of Regional Initiatives)

○ To attract tourists to Regional areas and to expand consumption in Regional areas, in March 2023 the JTA has -selected "Model Tourism Destinations around Japan for Creating Luxury Inbound Tourist Destinations in Regional Areas," where comprehensive measures are working intensively implemented in order to strengthen their ability to attract particularly luxury travelers to Regional areas.

## [Accommodations]

**Initiatives for Add high-value to accommodation facilities to meet the needs of luxury travelers**

Ex.: Experience Hida culture and living at a one-group-per-day accommodation facility renovated from a cultural property house adjacent to the Mingei Museum

(Takayama City, Gifu Prefecture)

## [Tourism Resources]

**Initiatives for Create attractive content that appeals to luxury travelers**

Ex.: Special guided tour around the sacred grounds of Ashimui/Asumui Shrine, the sacred site of the founding of the Ryukyu, where the royal family offered prayers

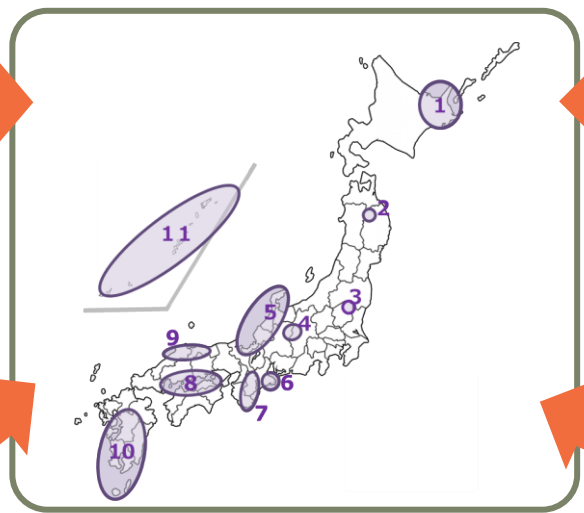
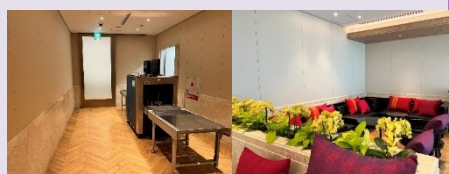
Ashimui Utaki (Kunigami Village (Yanbaru), Okinawa Prefecture)

## [Transportation]

**Initiatives for Make travel seamless to meet the needs of luxury travelers**

Ex.: Seto Inland Sea Cruise

Ex.: Private jet-only route at Naha Airport



**Accelerate quality improvements to model regions by creating, verifying, and refining itineraries**

**Spread to other Regional areas**

## [Human Resources]



**Initiatives for Foster guides and hospitality personnel for and send tourists to Regional areas**

Ex.: Shugendo experience with a special guide as you head to Nageiredo, a national treasure Mt. Mitoku (Misasa Town, Tottori Pref.)



# Regional Initiatives Case Study (1): Iwate Pref. (Tohoku Area)

- **Promote wide-area travel** by outreach for tourism routes that take advantage of the abundant natural resources of various parts of the Tohoku area. Efforts are also being made to **promote long-term stays** through improving the appeal of stay experiences by creating internationally competitive ski resorts and utilizing national parks, and by developing high-quality accommodation facilities.
- Various initiatives have increased tourism consumption and the total number of guest nights by European and American tourists compared to before COVID-19, and visits within the Tohoku region have become more spread out.
- Going forward, there will be work to address issues such as **creating high value-added experiential content** and **fostering special guides** to carry out this work.

## [Major Initiatives] Promoting wide-area excursions and stays by utilizing the area's abundant natural resources

- **Promoting wide-area travel** through the "Michinoku Coastal Trail"<sup>\*1</sup> and "TOHOKU Drive Route,"<sup>\*2</sup> through which tourists can enjoy the rich nature of the Tohoku area, and by promoting special experiences in each area
- \*1: A long-distance nature trail connecting Hachinohe City, Aomori Pref. to Soma City, Fukushima Pref.  
\*2: Seven routes including Sanriku Coast and Marine Adventure

A special experience on the Michinoku Coastal Trail



- **Promoting long-term stays by developing high-quality accommodation facilities** (adding high-value to accommodation facilities, and attracting resort hotels), and promoting **separation of lodging and meals**

Adding high-value to accommodation facilities (Hachimantai)



Promoting the separation of lodging and meals (Hachimantai)



- **Improving the attractiveness of stay experiences**
  - Creating an internationally competitive ski resort in Appi Kogen
  - Creating appeal by revitalizing the base of operations in Towada-Hachimantai national Park

Appi Kogen ski resort

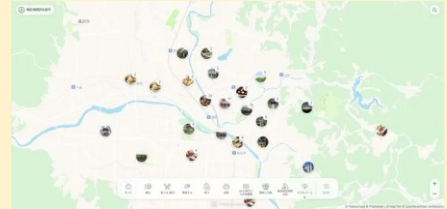


Revitalizing the base at Towada-Hachimantai National Park



- **Improving/strengthening the environment for accepting overseas travelers, and addressing issues such as labor shortages**
  - Multilingual digital maps and leaflets, expanding public Wi-Fi
  - Utilizing agricultural workers and interns from Taiwan during peak seasons

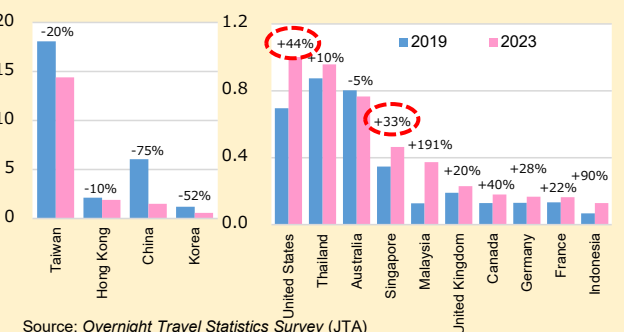
Multilingual digital map (Morioka City)



## [Major Results/Future Prospects]

- **Increase visits/guest stays by European, American, and Southeast Asian tourists**

(Figure I-66) Total number of guest nights by intl. Tourists in Iwate Pref., by country and region (10,000 guest nights)



Source: Overnight Travel Statistics Survey (JTA)  
Note 1: 2023 figures are preliminary.  
Note 2: Figures are for facilities with 10 or more employees.  
Note 3: Figures in the graphs are comparisons between 2023 and 2019.

- **Increase in avg. number of guest nights per tourist (1.6 nights to 1.9 nights\*)**  
\*Based on the International tourist Survey (JTA) regional survey (tourism and leisure purposes; Apr.-Dec. 2019 and Apr.-Dec. 2023 (reference values))

- **Visits within the Tohoku region have become more spread out**  
Number of visits to other areas within the region by tourists to the Tohoku region

(2023.1-9, Tohoku Tourism DMP overseas activity data)  
140 spots (+15 from 2019)  
2.161 million tourists (+42.8% from 2019)

- Going forward, issues to be addressed are **creating high value-added experiential content, fostering special guides** for this work, and strengthening communication with a wide range of Human Resources, including European, American, and Australian tourists.

# Regional Initiatives Case Study (2): Ishikawa Pref.

- **luxury travelers Europeans, Americans, and Australians** who have a high affinity for the region's tourism resources **were clearly targeted**, and a variety of initiatives were implemented, such as **enhancing high value-added experiential content** that utilizes Ishikawa's traditional culture, adding high-value to accommodation facilities, and **promoting excursions** via collaborations with a variety of entities.
- Through a variety of initiatives, tourism consumption and the total number of guest nights have increased. Of particular note is the remarkable increase in visits and stays by European, American, and Australian tourists.
- Going forward, efforts will be made to expand acceptance systems and improve residents' capacity to accept tourism in order to **realize sustainable tourism**.

## [Major Initiatives]

**Active collaborations with diverse entities and providing special experiences that utilize the traditional culture of the region**

- **Creating and providing high value-added experiential content unique to Ishikawa**
  - Visiting traditional craft studios such as for Kaga Yuzen and Kutani ware
  - Kanazawa Geigi
  - Mt. Haku worship experience, etc.



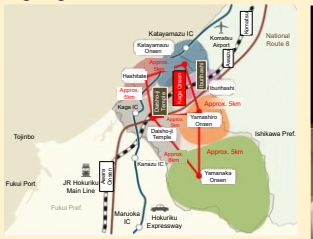
Experiencing traditional culture in the Kaga region



- **Promoting wide-area travel and stays through cooperation with surrounding regions**
  - Developing and promoting the Hokuriku-Hida-Shinshu "Mitsuboshi Kaido" Three-Star Road
  - Developing "Kanazawa-Toyama Gastrotourism" for the luxury travelers
  - Introducing wide-area tours through a multilingual official tourism website, etc.



- **Creating high value-added tourism areas through regional cooperation**
  - Renovating accommodation facilities with a common concept for three onsen areas
  - Improving mobility between onsen areas through secondary transportation demonstration experiments, etc.



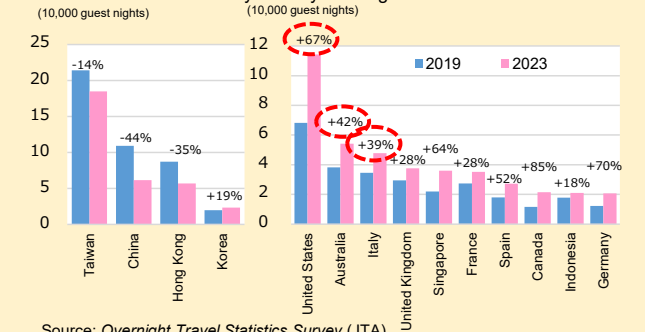
- **Actively promoting in cooperation with local businesses for European, American, and Australian tourists**
  - Establishing functions to promote Ishikawa for overseas tourism (U.S., 2023)
  - Exhibiting at travel fairs in European countries, etc.

- **Initiatives to expand acceptance systems and diversify demand**
  - Fostering guides who cater to the luxury travelers, and wide-area guides
  - In addition to diversifying locations, promoting diversification of times and periods by creating tourism comfort maps, etc.

## [Major Results/Future Prospects]

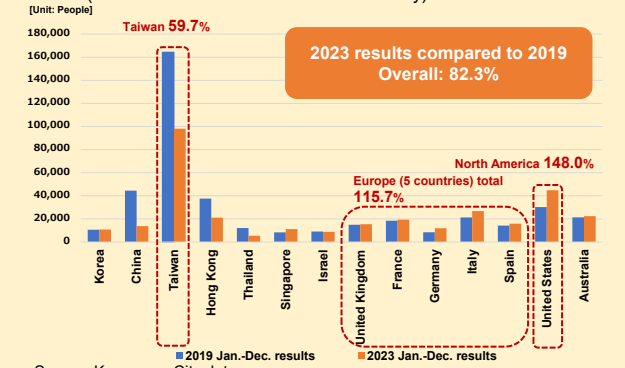
- **Large increase in visits and guest nights by European, American, and Australian tourists**

(Figure I-67) Total number of guest nights by intl.tourists in Ishikawa Pref., by country and region



Source: *Overnight Travel Statistics Survey (JTA)*  
 Note 1: 2023 figures are preliminary.  
 Note 2: Figures are for facilities with 10 or more employees.  
 Note 3: Figures in the graphs are comparisons between 2023 and 2019.

(Figure I-68) Number of intl.tourists to Kenrokuen (number of intl.tourists to Kanazawa City)



Source: Kanazawa City data

- Going forward, from the perspective of **sustainable tourism**, efforts will be made to expand acceptance systems and to improve residents' "tourism reception capacity" so that they willingly accept tourists

# Regional Initiatives Case Study (3): Kumamoto Pref.

- A virtuous system was created that utilizes local resources such as nature, culture, and industry for tourism, which then leads to the conservation and regeneration of each of these resources. With the goal of becoming a sustainable base for stays, initiatives are being taken to **improve/strengthen the environment for accepting overseas travelers and to promote stays** by adding high-value to accommodation facilities.
- As a result of various initiatives, tourism consumption and the total number of guest nights have increased compared to before COVID-19. Aso has also been selected as one of the "Top 100 Green Destinations."
- Focus is being put on improving profitability, returning profits to local areas, and creating tours that provide high satisfaction, thereby **further promoting the creation of a sustainable region.**

## [Major Initiatives]

Moving towards becoming a sustainable base for stays that realize symbiosis with local nature and society

- **Develop/provide experiential content to conservation and regeneration of the region's unique resources**
  - Special experiences such as cycling and horse riding on the grasslands of the Aso Caldera. A portion of the participation fees is returned to the region as a grassland conservation fee
  - Agricultural and forestry experiences in collaboration with local primary industry workers
  - Kumamoto samurai culture experience
  - At Kumamoto Castle, special dinners and guided tours of stone wall restoration, etc.

Grasslands activity tour (Aso)



Agricultural and food experience (Minamioguni)



Samurai culture experience (Kumamoto)



- **Promoting consumption by linking special experiences with purchasing local products and eating/drinking**

- Providing a place where tourists can purchase products from the grasslands at fair prices after the grasslands tour, and strengthening promotion of "Akaushi" beef
- Guiding/accompanying tourists to local restaurants after experiential tours

- **Promote stays by adding high-value to accommodation facilities, creating nighttime and early morning content, and collaborating with local Taiwanese businesses**

Adding high-value to accommodation facilities (Aso)



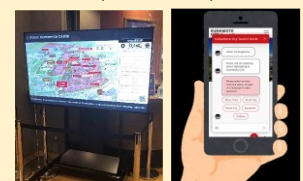
Early morning yoga experience (Aso)



- **Improving/strengthening the environment for accepting overseas travelers**

- Improving/expanding infrastructure (strengthening tourist information center functions; improving tourist information signs and multilingual explanations; introducing multilingual AI chatbots, etc.)
- Promoting vegetarian options at restaurants
- Strengthening guide training

Digital signage and AI chatbot (Kumamoto)



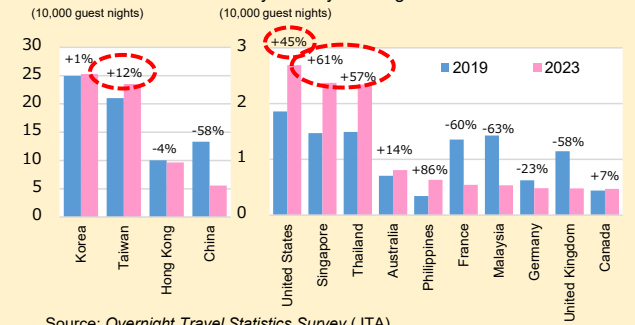
On-site training for fostering guides (Kumamoto)



## [Major Results/Future Prospects]

- **Increase in visits and guest stays by tourists from a wide range of countries, including tourists from Taiwan**

(Figure I-70) Total number of guest nights by intl. Tourists in Kumamoto Pref., by country and region



Source: Overnight Travel Statistics Survey (JTA)  
 Note 1: 2023 figures are preliminary.  
 Note 2: Figures are for facilities with 10 or more employees.  
 Note 3: Figures in the graphs are comparisons between 2023 and 2019.

Percentage of participants in the "Aso Sustainable Tour" (2023)  
 Of the total 405 participants, 36% were from France, 11% were from Singapore, and 6% were from the United States

- **Increase in avg. number of guest nights per tourist (1.3 nights to 1.5nights\*)**  
 \*Based on the International tourist Survey (JTA) regional survey (tourism and leisure purposes; Apr.-Dec. 2019 and Apr.-Dec. 2023 (reference values))

- **Selected as a "Top 100 Green Destination"\* (Aso)**  
 \*Awarded by Green Destinations, an international certification organization. 100 areas that received high evaluations for their stories of sustainable tourism initiatives were selected.

- Going forward, there will be further promotion for **creating a sustainable tourism areas** that will increase revenue, improve tourist satisfaction, and give back to the local community; through wide-area cooperation between Western Japan and Kyushu, there will be strengthened outreach to a wide range of Human Resources, including Europeans, Americans, and Australians

# Attracting Intl. Tourists to Regional Areas and Increasing Consumption (Summary)

- Based on the results of the analysis so far and the case studies from these three regions, in order to increase consumption by inbound tourists to Regional areas, it is necessary to:
  - **Create and refine high-quality experiential content that is unique to the region**, utilizing the region's unique resources, such as rich nature, culture, and food
  - **Promote wide-area tours and engage in strategic outreach** through collaborations with various entities both inside and outside the region
  - **Promote long-term stays** by improving the appeal of stay experiences
- Furthermore, in light of supply-side issues in each region, such as securing tourism personnel and transportation, it is important to work to **improve and enhance the environment for accepting overseas travelers**, while also **increasing profitability by adding high-value to tourism areas and tourism services**, thereby **creating virtuous cycles in which revenue is returned to local economies and societies**. There is a need to **create sustainable tourism areas** while simultaneously welcoming tourists and ensuring residents' quality of life.

## Promoting expansion of and quality improvements to inbound tourism consumption by providing special experiences, etc.

● **By combining** Japan's outstanding tourism resources (nature, culture, food, sports, etc.) **with the full use of ideas such as early morning/nighttime hours and undisclosed/uncrowded areas**,

unprecedented inbound tourism demand is created and **special, limited-time experiences can be offered**.

● Particularly, **in order to further expand consumption of experiential content in regional areas and to improve its quality**, along with the encouragement of use of regional nature and traditional culture, local production and local consumption of food, and the use of local human resources, **creation of "local premium experiential content" that has extremely high added value and that brings together various resources to become the highlights of the region is promoted**.

### Limited-time special experiences



Special private viewing at the Museum of the Imperial Collections, Sannomaru Shozokan



Night Festival at the Tokyo National Museum

### Local premium experiential content



Special regional experience on the Michinoku Coastal Trail



Concerts at unique venues in Kamakura and Oku-Nikko

## Creating sustainable tourism areas

● Based on the "**Japan Sustainable Tourism Standard for Destinations**" that were formulated together with UN Tourism, support is being provided to local governments and DMOs, etc., **with the aim of increasing to 100 the number of regions throughout Japan that are working to create sustainable tourism areas**.

● 20 regions were selected as "Pioneer Model Regions" in the first public call for the "Project to Promote Sustainable Tourism by Preventing and Curbing Overtourism."

● After being selected, **forums for discussion will be set up with local stakeholders**, based on analysis of the issues, **plans for specific measures are working formulated and initiatives will be implemented**.

### List of Pioneer Model Regions (March 2024)

[Selected regions and major initiatives] \*In no particular order

#### Measures to address congestion on public transportation, etc.

- (1) **Kyoto**: Establish "Sightseeing Limited Express Bus," guidance to subways, and expanding "Hands-Free Travel"
- (2) **Niseko area**: Expand the "Niseko model" to address taxi shortages
- (3) **Zao**: Introduce variable ropeway prices, and congestion visualization
- (4) **Kawagoe**: Strengthen park & ride, disseminate information parking lot congestion
- (5) **Hakone**: Dispersion and equalization using the "Hakone Digital Map"
- (6) **Izumo Taisha**: Introduce variable parking fee system

#### Measures to address bad manners

- (7) **Biei**: Use AI cameras to prevent unauthorized entry into private land such as farmland
- (8) **Kamakura/Fujiwara**: Install cameras to prevent bad manners when people take photos
- (9) **Shirakawa-go**: Strengthen awareness of manners, incl. before trips, based on analysis or country/region of origin
- (10) **Nara Park / Yamanobe-no-Michi**: Tourists participate in landscape conservation activities

#### Protecting the natural environment

- (11) **Iriomote Island**: Introduce access restrictions based on the Ecotourism Promotion Act
- (12) **Onise**: Implement vehicle traffic restrictions, consider introducing user fees
- (13) **Mt. Fuji Yoshida Trail**: Set conditions for number of climbers and introduce toll fees
- (14) **Mt. Fuji Fuiunomiya Trail, Gotemba Trail, and Subashiri Trail**: Introduce a mountain entry management system for pre-registering climbing plans, etc.
- (15) **Aso**: Reduce environmental impact by using EVs and bicycles

### Examples of regional initiatives

Kamaishi City, Iwate Pref. (Kamaishi DMC Ltd.)



SDGs Learning Program on Marine Conservation

Corporate workstation

Ozu City, Ehime Pref. (Kita Management)



"Ozu Stories: Ozu Castle-Town Regeneration Stories" guided tours



#### Diversifying demand and promoting excursions, etc.

- (16) **Miyajima/Miyajimaguchi**: Improve terminal on the Miyajima side, and congestion visualization
- (17) **Aakusa**: Measures to address congestion around Sensoji Temple, and utilization of road space
- (18) **Sado**: Strengthen secondary transportation on the island, and promote excursions
- (19) **Mt. Koya**: Use data to disperse and equalize tourists visiting the pilgrimage
- (20) **Nivado River Basin**: Improving environment for accepting overseas travelers at new tourist spots, and enhance content for excursions

## Promote various measures based on the three strategies outlined in the Tourism Nation Promotion Basic Plan

### Creating sustainable tourism destinations

Promote the creation of mechanisms to **improve the profitability and productivity** of tourism services and to generate **virtuous cycles for local communities and economies**

- Revitalizing and adding high-value to tourist destinations and the tourism industry (renovating accommodation facilities, removing abandoned buildings, and area-wide digital transformation)



Large-scale renovation of accommodation facilities



Integrating cashless payments with communities



Smart trash cans (ex. of improving/strengthening acceptance environment)



Tourism manners awareness signs (ex. of preventing/curbing bad manners)



Fostering tourism human resources



Food delivery robot (ex. of capital investment support)

### Attracting inbound tourists, mainly to regional areas

Emphasis on **increasing consumption and attracting tourists to regional areas**

- Develop content (providing special experiences, etc.)
- Attracting luxury travelers (11 model destinations)
- Promoting MICE (increasing visits and consumption by overseas business travelers)
- Promoting outbound travel and international mutual exchanges



Special nighttime viewing of Itsukushima Shrine (ex. of providing special experiences)



Creating content that attracts luxury travelers

### Expanding domestic exchanges

Aiming to **increase domestic travel rates and lengthen stays** despite declining the population

- Promoting the spread of workation (demonstration models for nomadic workers and the child-rearing generation)
- Promoting continuous and frequent visits
- Promoting the spread and establishment of universal tourism
- Promoting the equalization of domestic travel demand



Promoting the spread of workation



Encouraging continuous and frequent visits