

# **White Paper on Tourism in Japan, 2020** (Summary)

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Japan Tourism Agency  
June 2020

# Outline of White Paper

White Paper on Tourism in Japan is submitted to the Diet every year in accordance with Article 8 of the Basic Act for Promoting a Tourism-Oriented Country. This Paper consists of the following four parts.

## Part I Tourism Trends in 2019

- Chapter 1 Global Tourism Trends
- Chapter 2 Tourism Trends in Japan

## Part II Responding to the Impact of COVID-19 and Restarting Regional Revitalization through Tourism

- Chapter 1 Impact of COVID-19 on Tourism and the Countermeasures
- Chapter 2 Restarting Regional Revitalization through Tourism

## Part III Measures Taken in FY2019

- Chapter 1 Development of Environment that Foreigners Truly Enjoy Visit to Japan
- Chapter 2 Development of New Tourism Contents in Regional Areas
- Chapter 3 Appropriate Sharing of Roles and Strengthening Cooperation between Japan National Tourism Organization and Regional Organizations (Local Governments and Destination Management/Marketing Organizations)
- Chapter 4 Other Measures Contributing to Increase in Consumption and Visitors in Regional Areas

## Part IV Measures to be Taken in FY2020

- Chapter 1 Countermeasures against COVID-19 in the Field of Tourism
- Chapter 2 Strategies beyond COVID-19

# Part I Tourism Trends in 2019

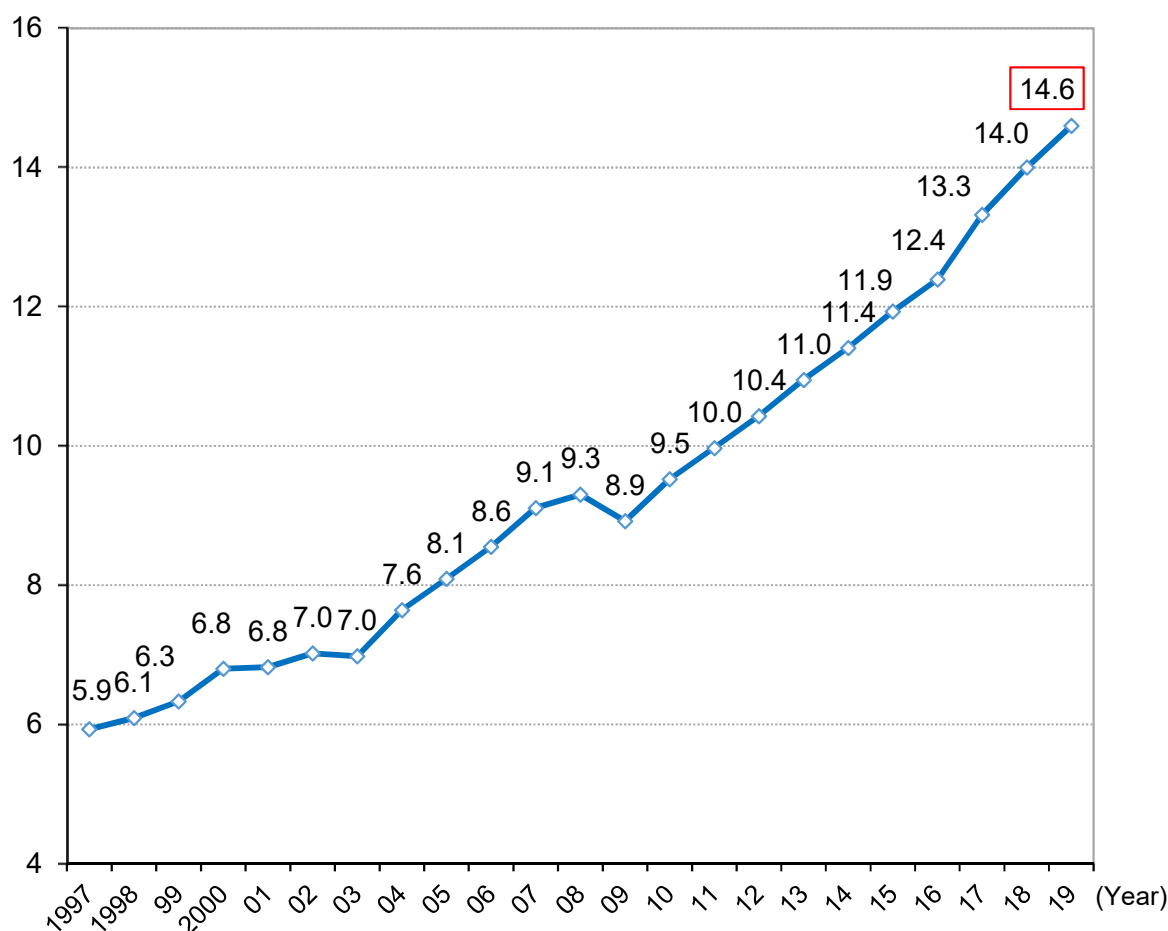
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- Tourism Trends in Japan (International Visitors Traveling to Japan).....6
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# Part I: Global Tourism Trends (1)

- According to the global tourism trends announced by the United Nations World Tourism Organization (UNWTO), the total number of international tourists was 1,461 million in 2019, increasing by 54 million (3.8%) from 2018.
- By region, both arrivals and departures in the Asia-Pacific have been increasing in recent years.

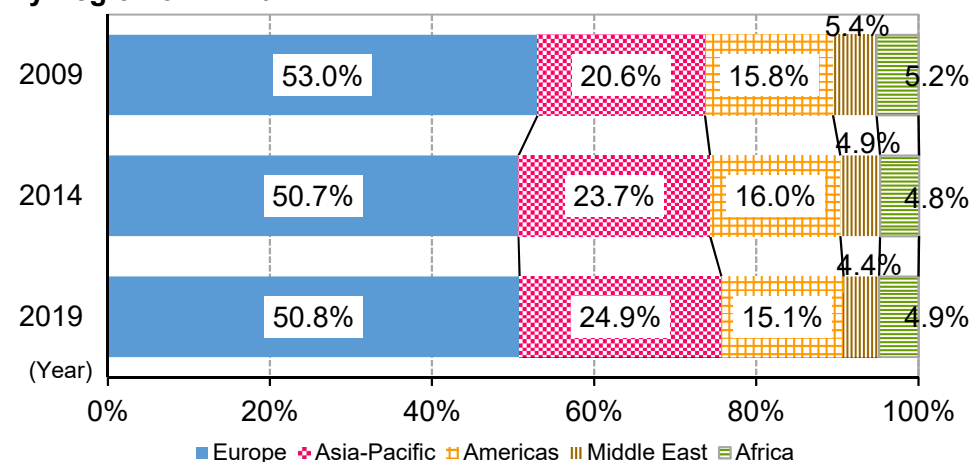
(Figure I-2) Number of International Tourists

(100 million people)

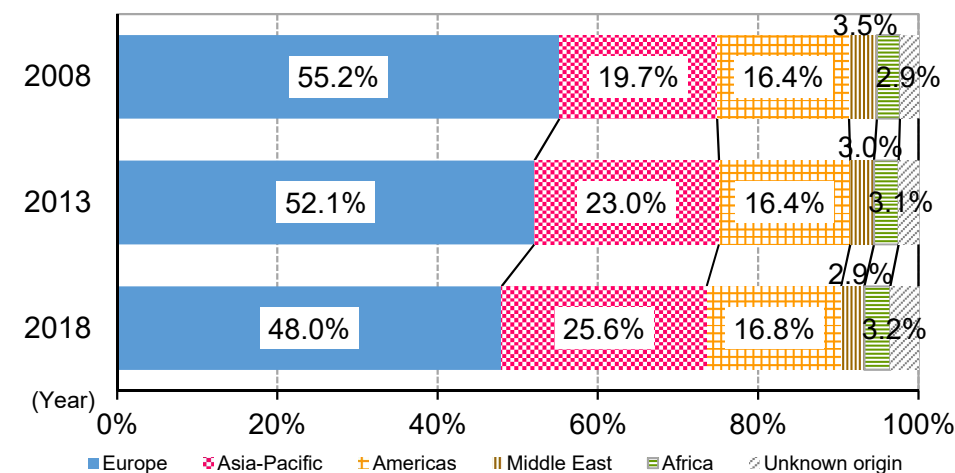


(Figure I-5) Number of International Tourists by Region of Origin

<By Region of Arrival>



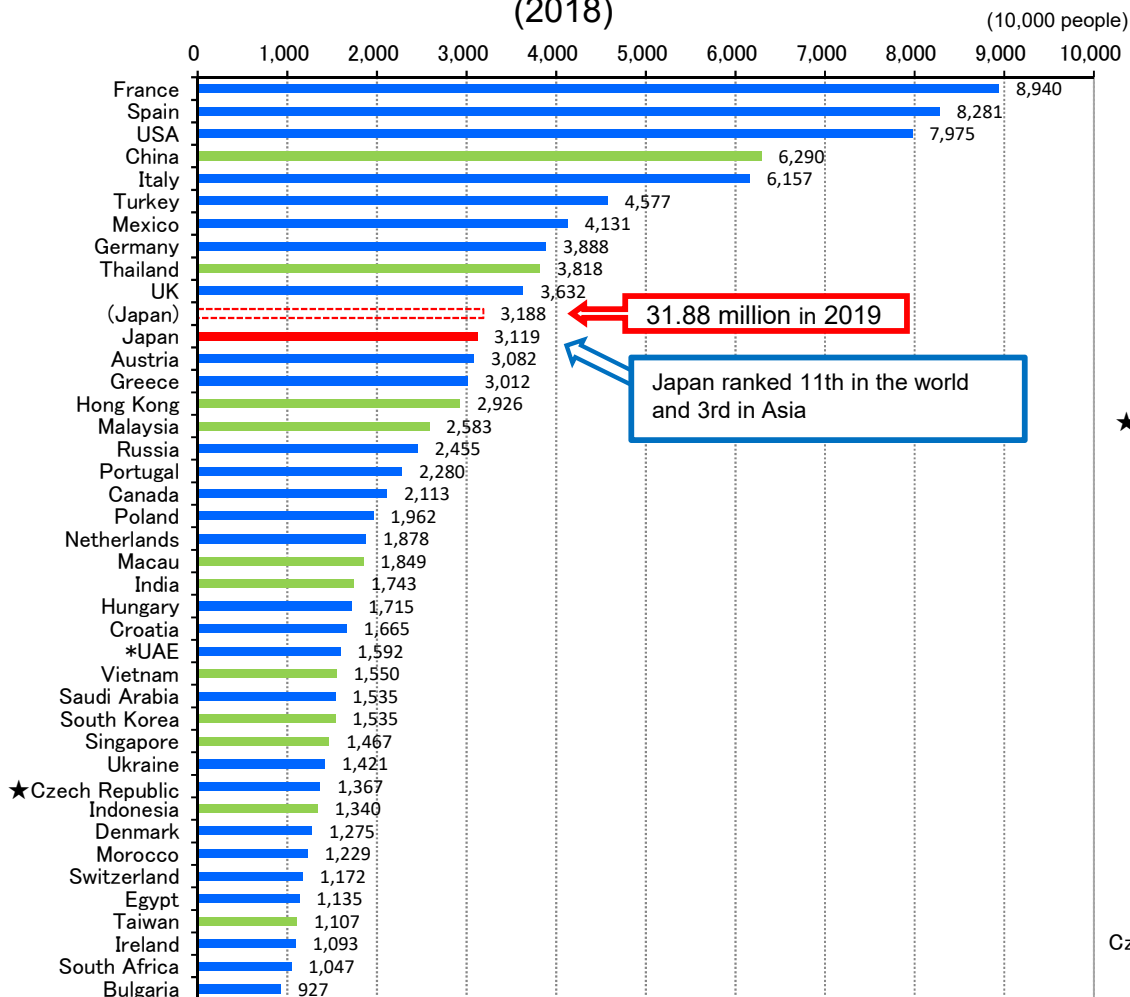
<By Region of Departure>



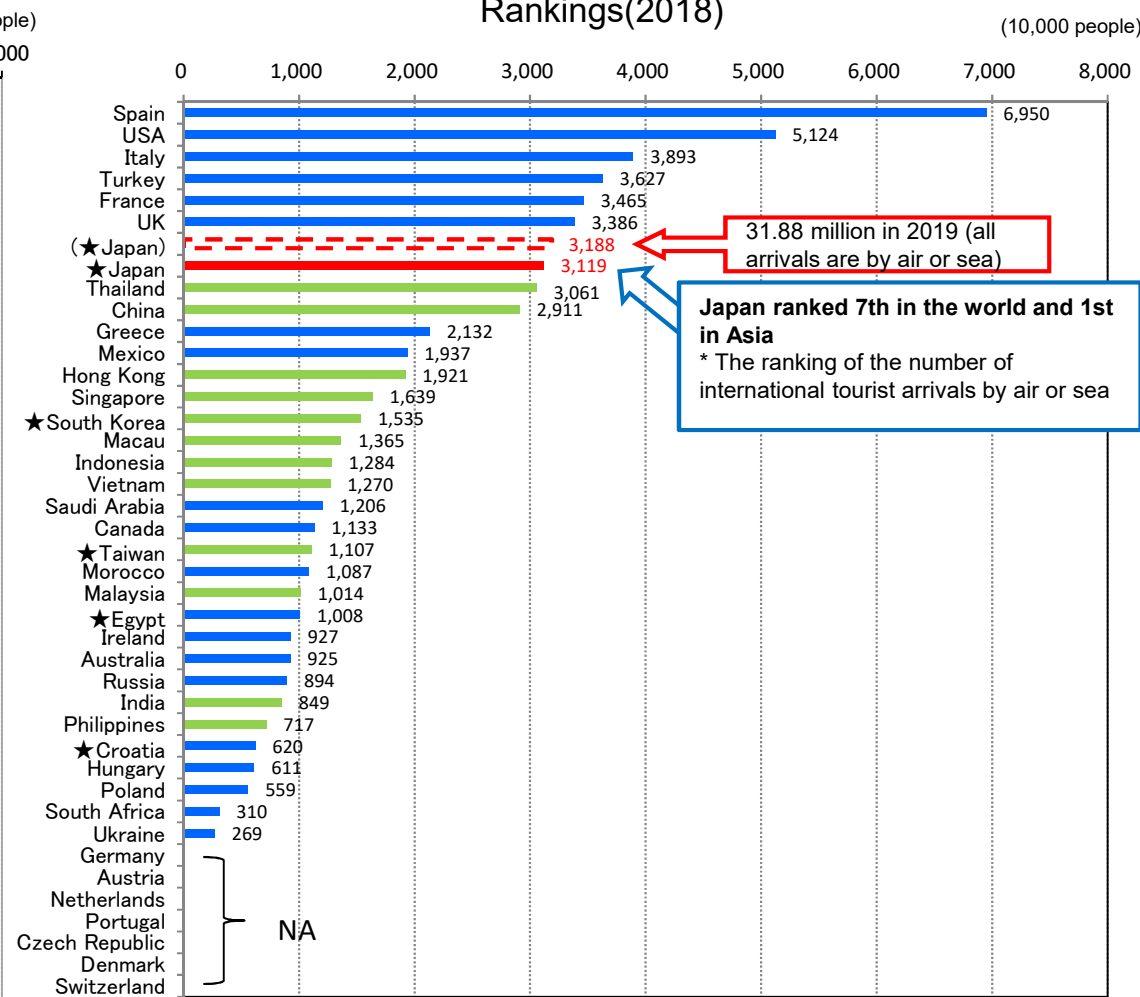
# Part I: Global Tourism Trends (2)

- In the “International Tourist Arrivals by Country/Region Rankings” of 2018, Japan ranked **11th**, with 31.19 million, while in the “International Tourist Arrivals by Air or Sea Rankings,” Japan ranked **7th (1st in Asia)**.
- The total number of international visitors to Japan in 2019 (31.88 million) was equivalent to **11th** and **7th** in the “International Tourist Arrivals by Country/Region Rankings(2018)” and the “International Tourist Arrivals by Air or Sea Rankings(2018)”.

(Figure I-6) International Tourist Arrivals by Country/Region Rankings (2018)



(Figure I-7) International Tourist Arrivals by Air or Sea Rankings(2018)



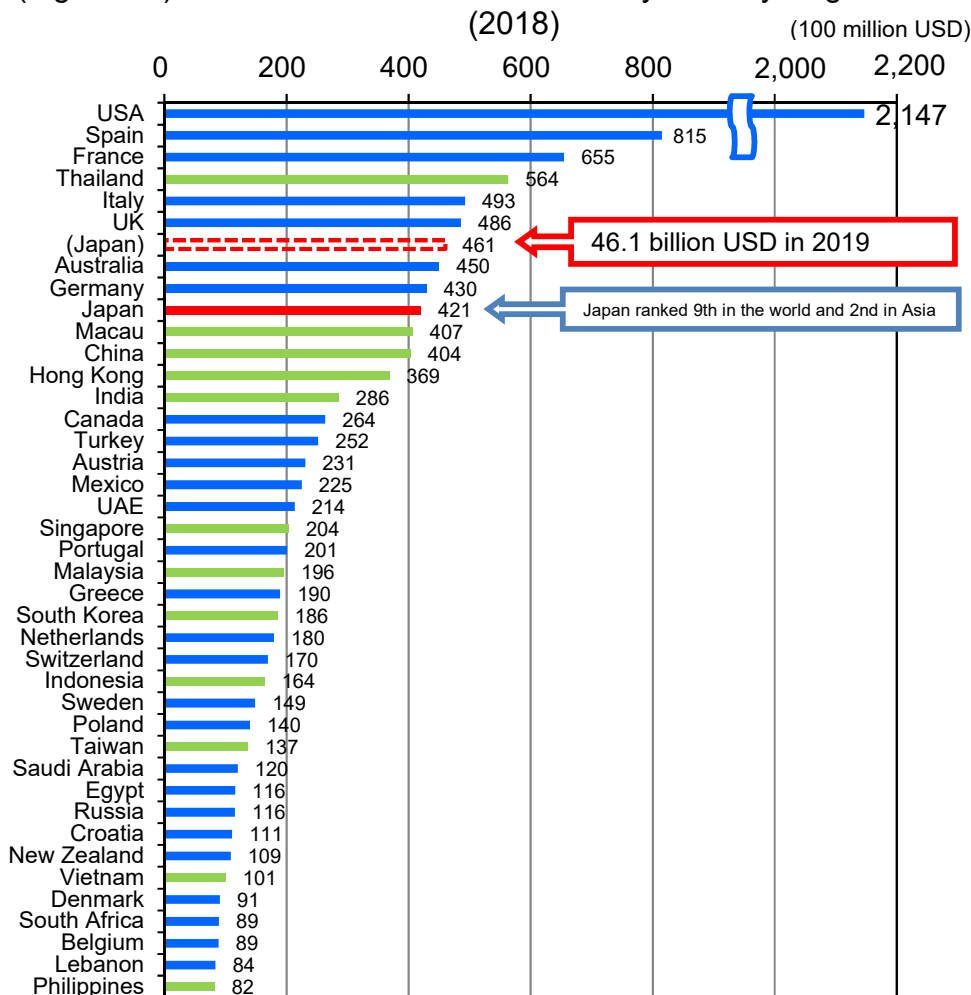
Source: Prepared by the JTA based on data from UNWTO  
 Note 1. Figures shown above are provisional as of May 2020.  
 Note 2. In countries marked with ★, figures for 2018 are yet to be announced, and figures for 2017 have been adopted instead.  
 Note 3. Figures for the United Arab Emirates are for Dubai only.  
 Note 4. The above chart shows the statistics of the number of tourist arrivals who had at least one overnight stay in the country/region they visited, except for Japan, Russia, South Korea, Vietnam, and Taiwan.  
 Note 5. Rankings are subject to change depending on the timing of data collection, as related data may be updated or modified from time to time.  
 Note 6. It should be noted, particularly for the purpose of comparison, that the number of international tourist arrivals is calculated and published based on different statistical criteria for each country and region.  
 (For example, the number of foreign crew members is not included in statistics related to Japan, but it is included in the statistics of France, Spain, China, South Korea, and others.)

Source: Prepared by the JTA based on data from UNWTO  
 Note 1. It should be noted, particularly for the purpose of strict comparison, that the number of international tourist arrivals is calculated and published by different statistical criteria for each country and region.  
 Note 2. The figures shown above are provisional as of January 2020.  
 Note 3. Excluding countries/regions marked with a ★, the above chart shows the statistics of the number of international visitors who had at least one overnight stay in the country/region they visited.  
 Note 4. Countries/regions belonging to Asia are indicated in green.  
 Note 5. In countries and regions where figures for 2018 are unannounced or unknown, figures for the latest year for which the statistics are available are adopted.  
 Note 6. The above chart shows the statistics of the number of international visitors arriving by air and sea, which excludes those arriving by land (by car, etc.).  
 Note 7. The number of international tourist arrivals by air or sea is unknown for Germany, Austria, the Netherlands, Portugal, Czech Republic, Denmark, and Switzerland, as transportation mode-specific data is unavailable.  
 Note 8. Rankings are subject to change depending on the timing of data collection, as related data may be updated or modified from time to time.

# Part I: Global Tourism Trends (3)

In the “International Tourism Revenue by Country/Region Ranking” of 2018, Japan recording 42.1 billion USD, **ranked 9th (2nd in Asia)**, up from 11th (4th in Asia) in 2017. In the “International Tourism Expenditure by Country/Region Rankings,” Japan posting 20.2 billion USD, ranked **16th (6th in Asia)**, up from 18th (6th in Asia) in 2017.

(Figure I-8) International Tourism Revenue by Country/Region Ranking



Source: Prepared by the JTA based on data from UNWTO and each country's national tourism offices

Note 1. Figures shown above are provisional as of May 2020.

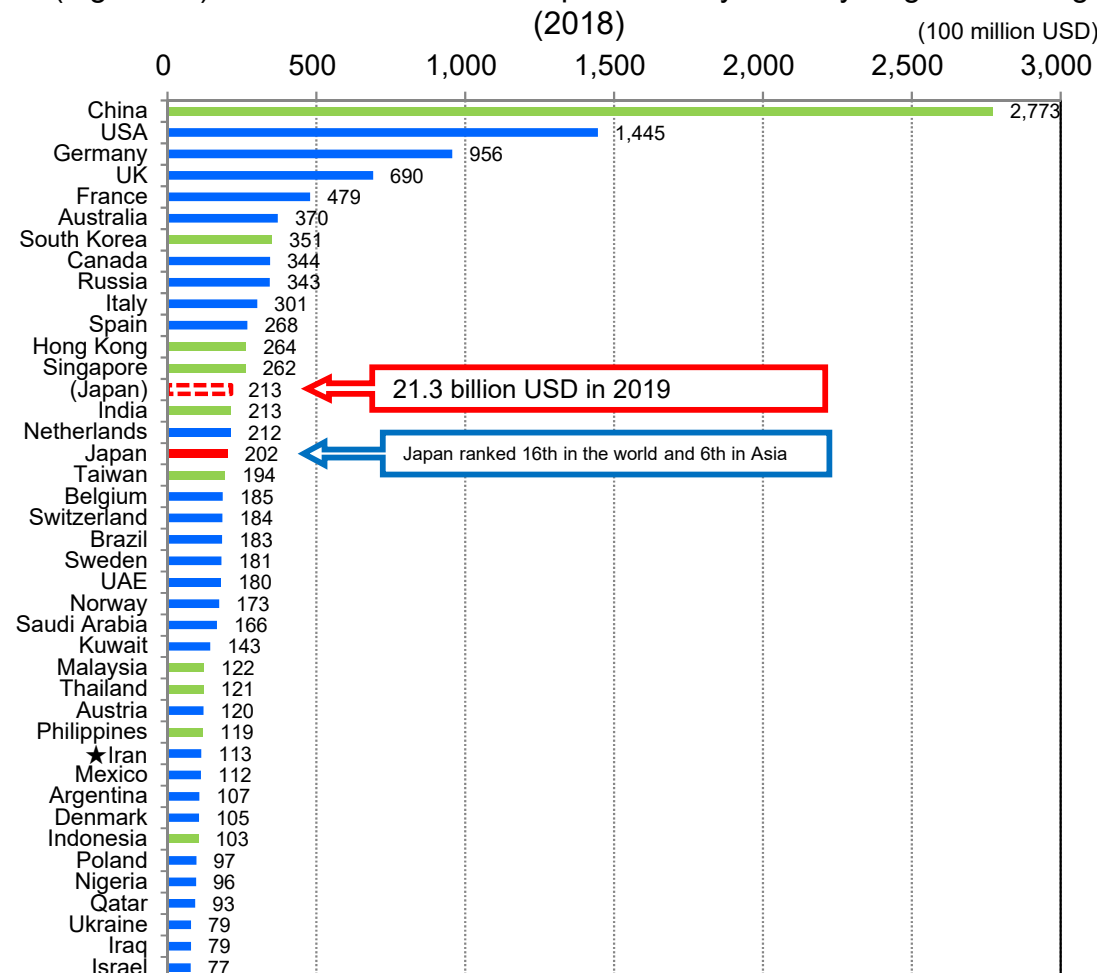
Note 2. International tourism revenue does not include international passenger fares.

Note 3. Data on international tourism revenue may be updated or modified from time to time.

Calculated values of international tourism receipts are subject to fluctuations in currency exchange rates to the US dollar.

Thus, rankings may change depending on the timing of data collection.

(Figure I-9) International Tourism Expenditure by Country/Region Rankings



Source: Prepared by the JTA based on data from UNWTO and each country's national tourism offices

Note 1. Figures shown above are provisional as of May 2020.

Note 2. In countries marked with ★, figures for 2018 are yet to be announced, and figures for 2017 have been adopted instead.

Note 3. International tourism expenditure does not include international passenger fares.

Note 4. Data on international tourism expenditures may be updated or modified from time to time.

Calculated values of international tourism expenditures are subject to fluctuations in US dollar exchange rates.

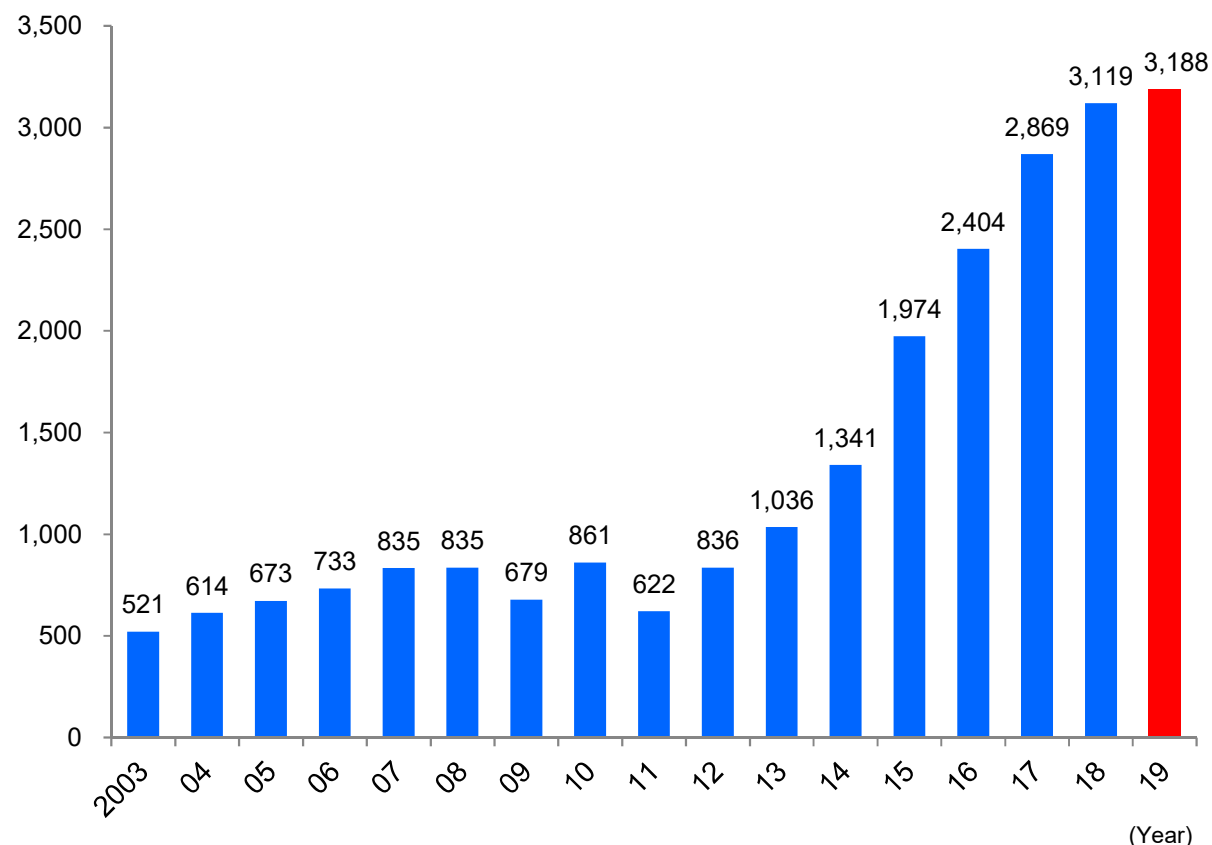
Thus, rankings may change depending on the timing of data collection.

# Part I: Tourism Trends in Japan (International Visitors Traveling to Japan) (1)

- In 2019, total number of international visitors to Japan increased by 2.2% from 2018 to 31.88 million.
- Of this total, the number of visitors from Asia was 26.37 million (82.7% of the total), including 22.36 million (70.1%) from East Asia and 3.83 million (12.0%) from six major ASEAN countries. The figures for North America and five major European countries (UK, France, Germany, Italy, and Spain) were 2.1 million and 1.29 million, respectively.

(Figure I-10) Number of International Visitors to Japan

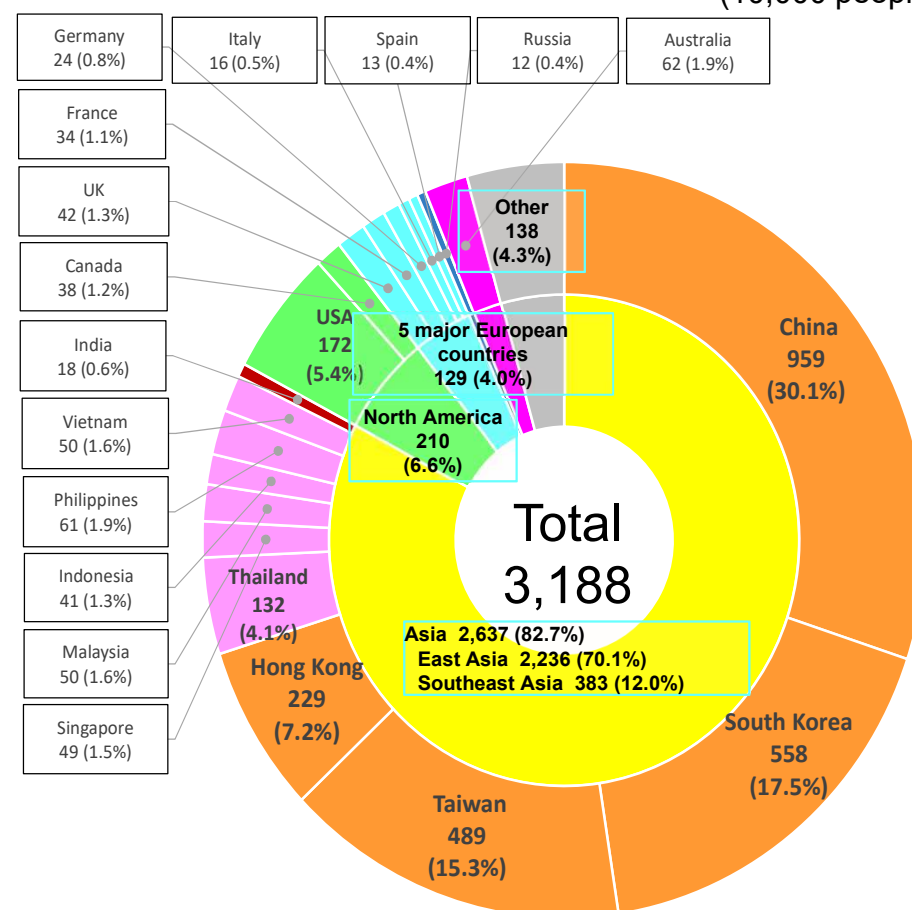
(10,000 people)



Source: Prepared by the JTA based on data from JNTO

(Figure I-11) Number of International Visitors to Japan: Breakdown by Country/Region(2019)

(10,000 people)



Source: Prepared by the JTA based on data from JNTO

Note 1. Figures in parentheses indicate a percentage among the total number of international visitors to Japan.

Note 2. "Other" includes countries and regions in Asia and Europe not specified in the above chart.

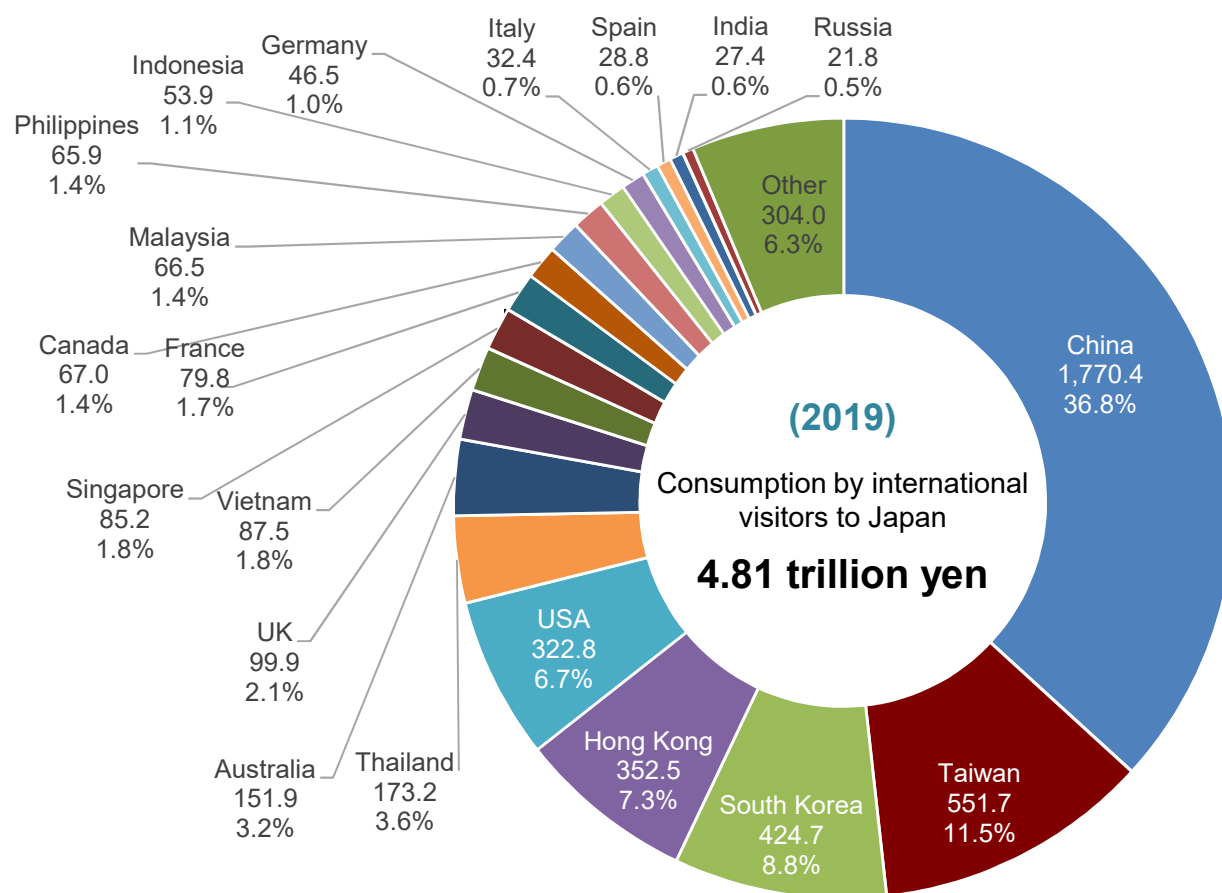
Note 3. Totals may not be exact due to rounding.

## Part I: Tourism Trends in Japan (International Visitors Traveling to Japan) (2)

- Tourism consumption by international visitors in 2019 hit a record high of **4.8135 trillion yen (up 6.5% from 2018)**, recording a new high for the seventh consecutive year.
- By country/region, China took first place with 1.7704 trillion yen (36.8% of the total), followed by Taiwan with 551.7 billion yen (11.5%), South Korea with 424.7 billion yen (8.8%), Hong Kong with 352.5 billion yen (7.3%), and the United States with 322.8 billion yen (6.7%). These top five locations accounted for 71.1% of the total.

(Figure I-13) Tourism Consumption by International Visitors (Figure I-14) Tourism Consumption by International Visitors: Breakdown by Country/Region

Year	Consumption by international visitors
2012	1.08 trillion yen
2013	1.42 trillion yen
2014	2.03 trillion yen
2015	3.48 trillion yen
2016	3.75 trillion yen
2017	4.42 trillion yen
2018	4.52 trillion yen
2019	<b>4.81 trillion yen</b>



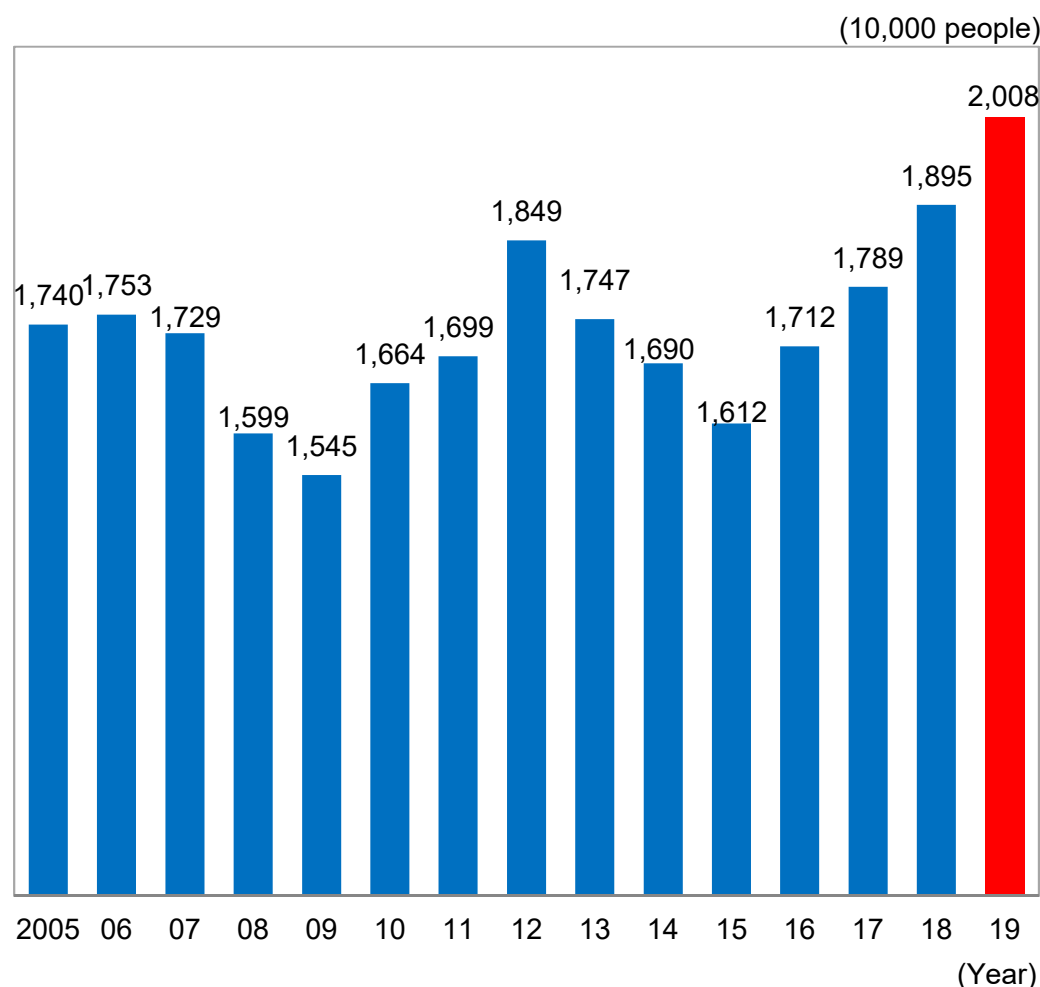
Note 1. Please note that there was a change of statistical basis. The survey focused mainly on travelers using airports until 2017; however, in light of the rapid increase in the number of cruise travelers, who tend to stay for a short period of time, the scope of the survey was expanded to cover cruise travelers since 2018.



# Part I: Tourism Trends in Japan (Japanese Overseas/Domestic Travel) (1)

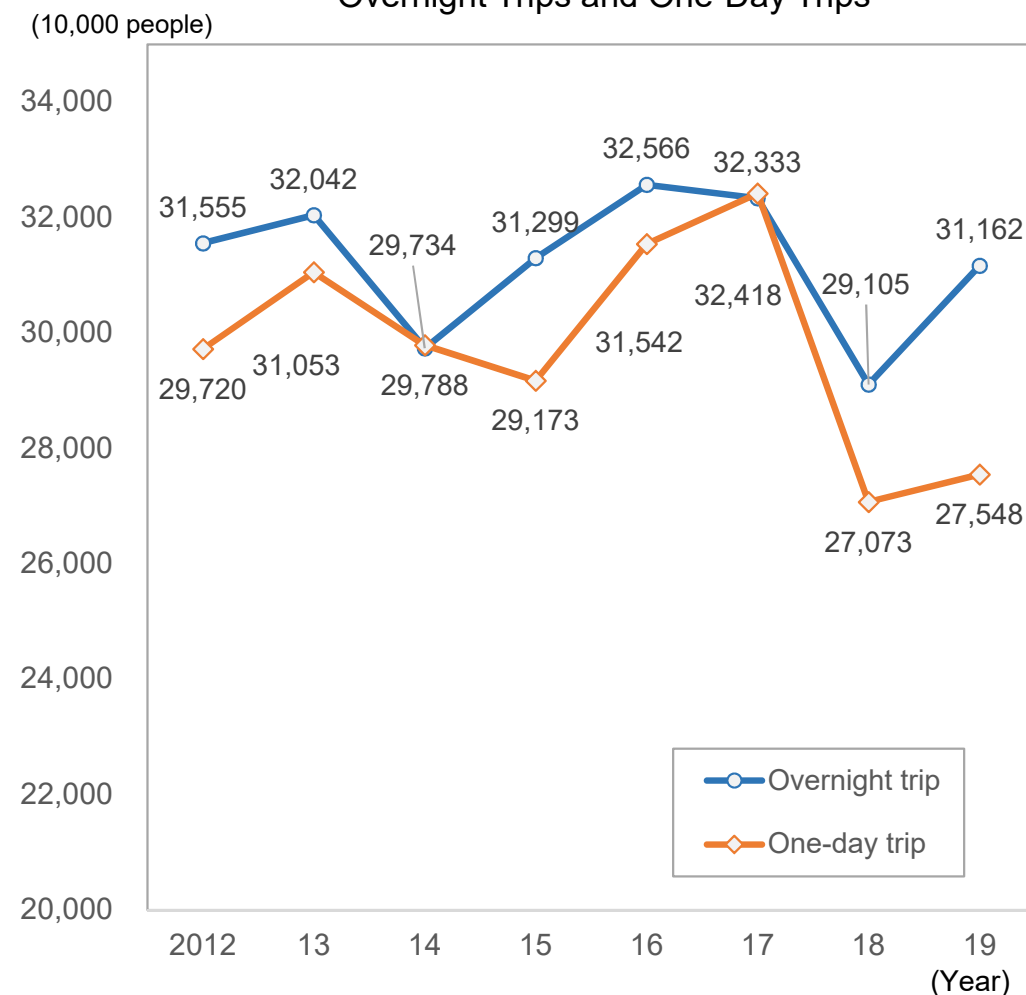
- Total number of Japanese overseas travelers hit a **record high of 20.08 million in 2019 (up 5.9% from 2018)**, **exceeding 20 million** for the first time in about 30 years after reaching 10 million in 1990.
- In 2019, the total number of Japanese who took domestic overnight trips was **311.62 million (up 7.1% from 2018)**, and the figure for domestic one-day trips was **275.48 million (up 1.8% from 2018)**.

(Figure I-25) Number of Japanese Overseas Travelers



Source: Prepared by the JTA based on data from JNTO

(Figure I-29) Total Number of Japanese Taking Domestic Overnight Trips and One-Day Trips

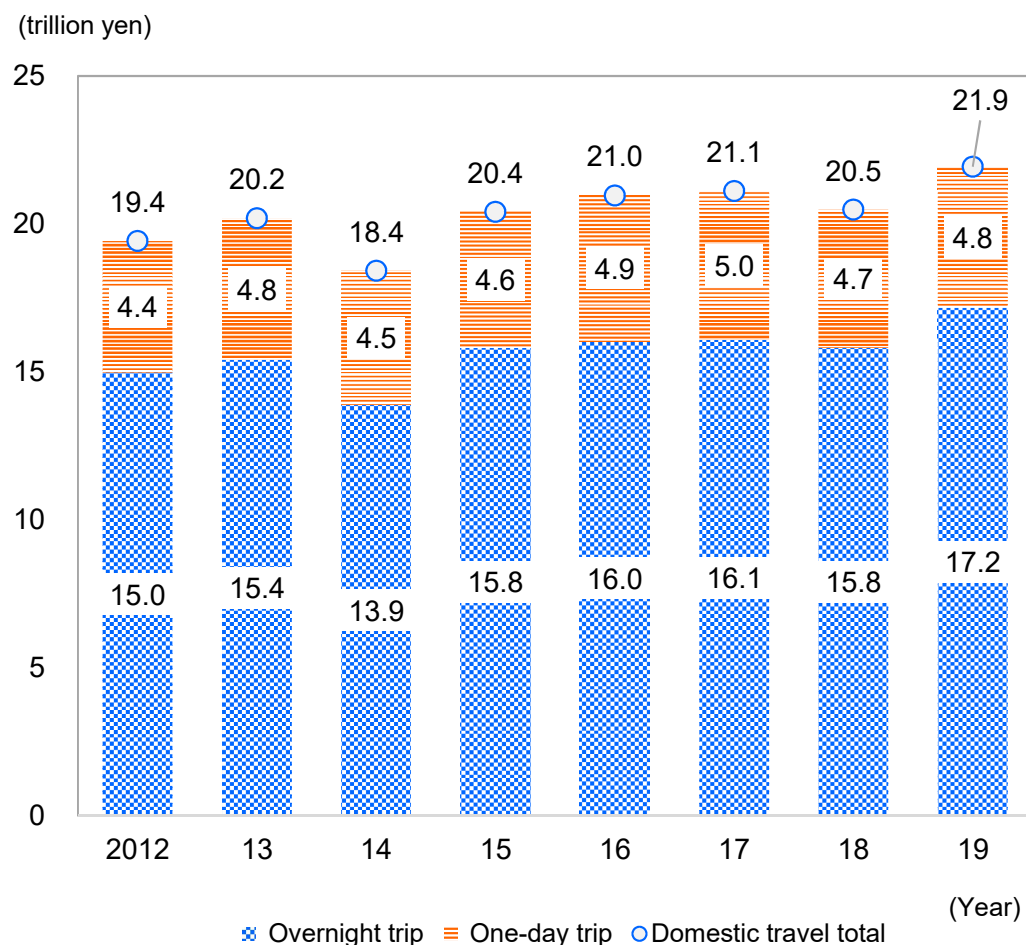


Source: National Tourism Survey (JTA)

## Part I: Tourism Trends in Japan (Japanese Overseas/Domestic Travel) (2)

- Japanese domestic tourism consumption totaled **21.9 trillion yen** in 2019 (up 7.1% from 2018).
- In 2019, domestic tourism consumption by Japanese and international visitors totaled **27.9 trillion yen** (up 7.1% from 2018).
- Of this total, **17.2%** was related to international visitors.

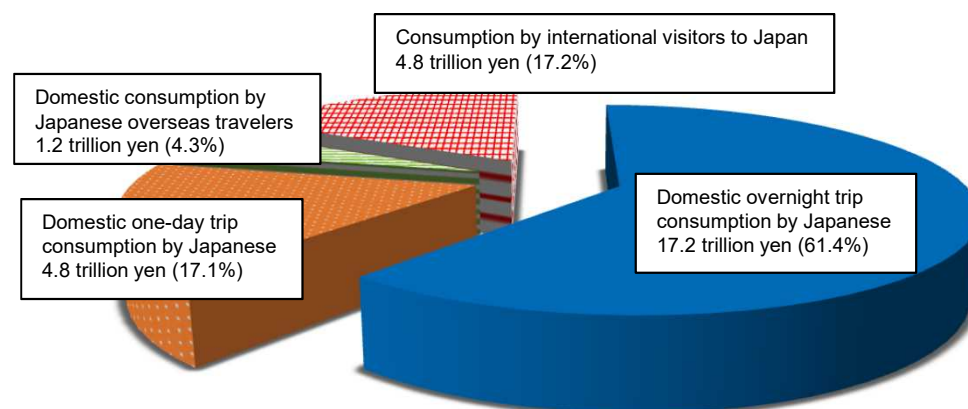
(Figure I-30) Japanese Domestic Tourism Consumption



Source: National Tourism Survey (JTA)

(Figure I-31) Domestic Tourism Consumption in Japan

**27.9 trillion yen**



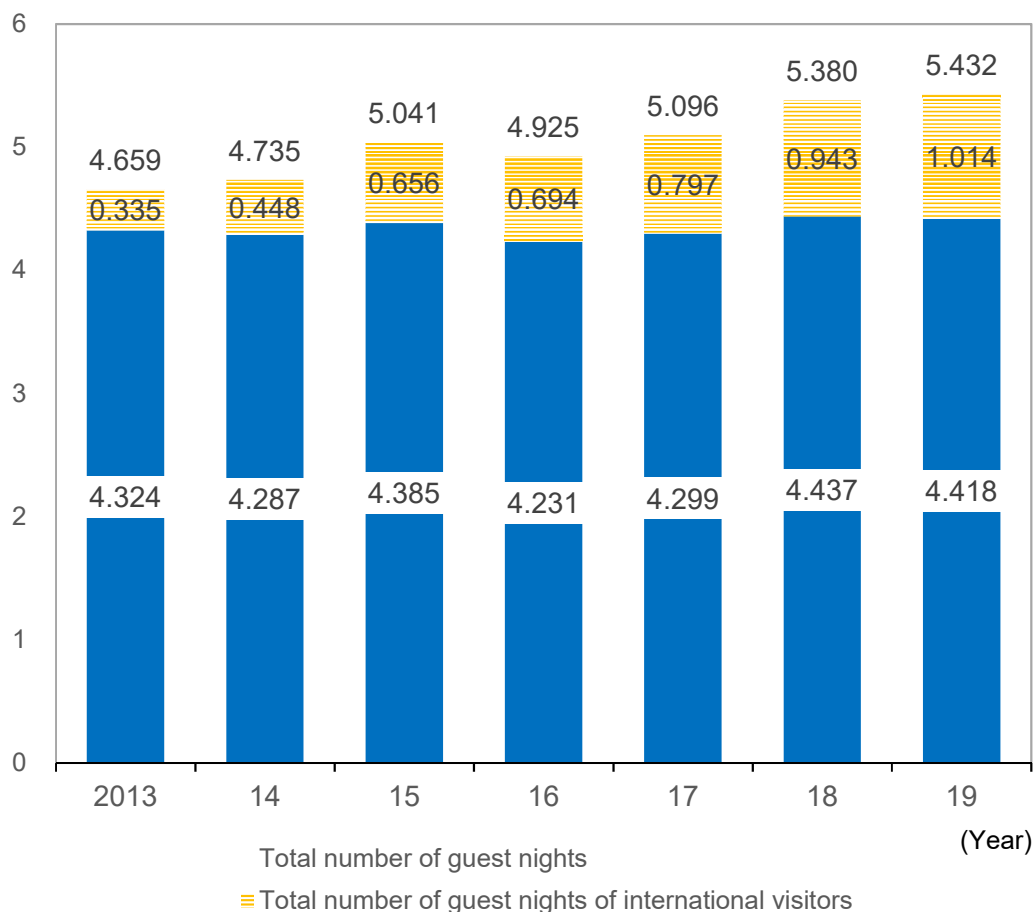
Source: National Tourism Survey (JTA) and International Visitor Survey (JTA)

# Part I: Tourism Trends in Japan (Overnight Trips) (1)

- Total number of nights stayed in hotels and ryokan (Japanese-style inn) in Japan increased to **543.24 million in 2019 (up 1.0% from 2018)**. Of this total, Japanese travelers accounted for 441.80 million (down 0.4% from 2018) and international visitors for 101.43 million (up 7.6% from 2018), exceeding 100 million for the first time since the start of the survey in 2007.
- Total number of nights of international visitors stayed in regional areas increased to 39.21 million in 2019 (up 1.9% year on year).

(Figure I-32) Total Number of Nights stayed (Japanese/International Travelers)

(100 million guest nights)



Source: Overnight Travel Statistics Survey (JTA)

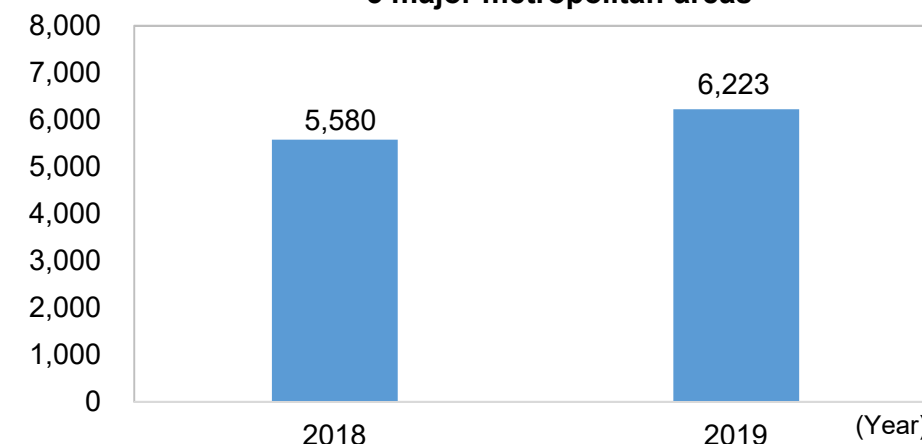
Note 1. Preliminary figures for 2019.

Note 2. Figures given above each bar indicate the total number of nights of Japanese and international travelers' stays combined.

(Figure I-33) Total Number of Nights of International Visitors' stays: 3 Major Metropolitan Areas and Regional Areas

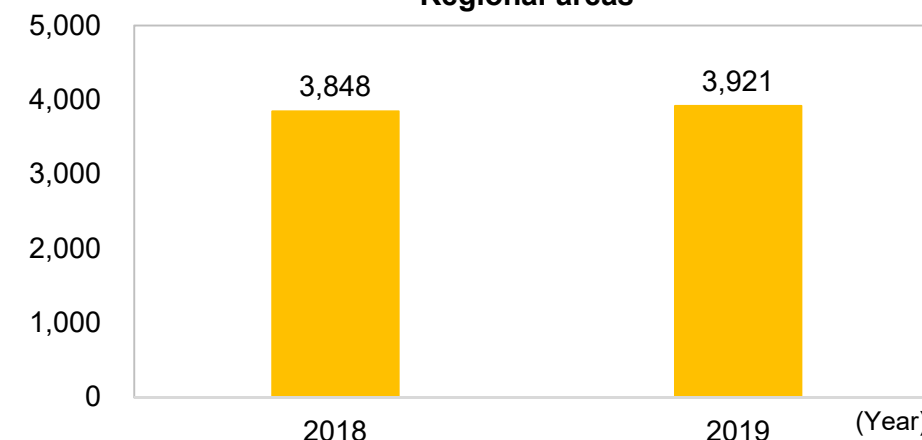
(10,000 guest nights)

3 major metropolitan areas



(10,000 guest nights)

Regional areas



Source: Overnight Travel Statistics Survey (JTA)

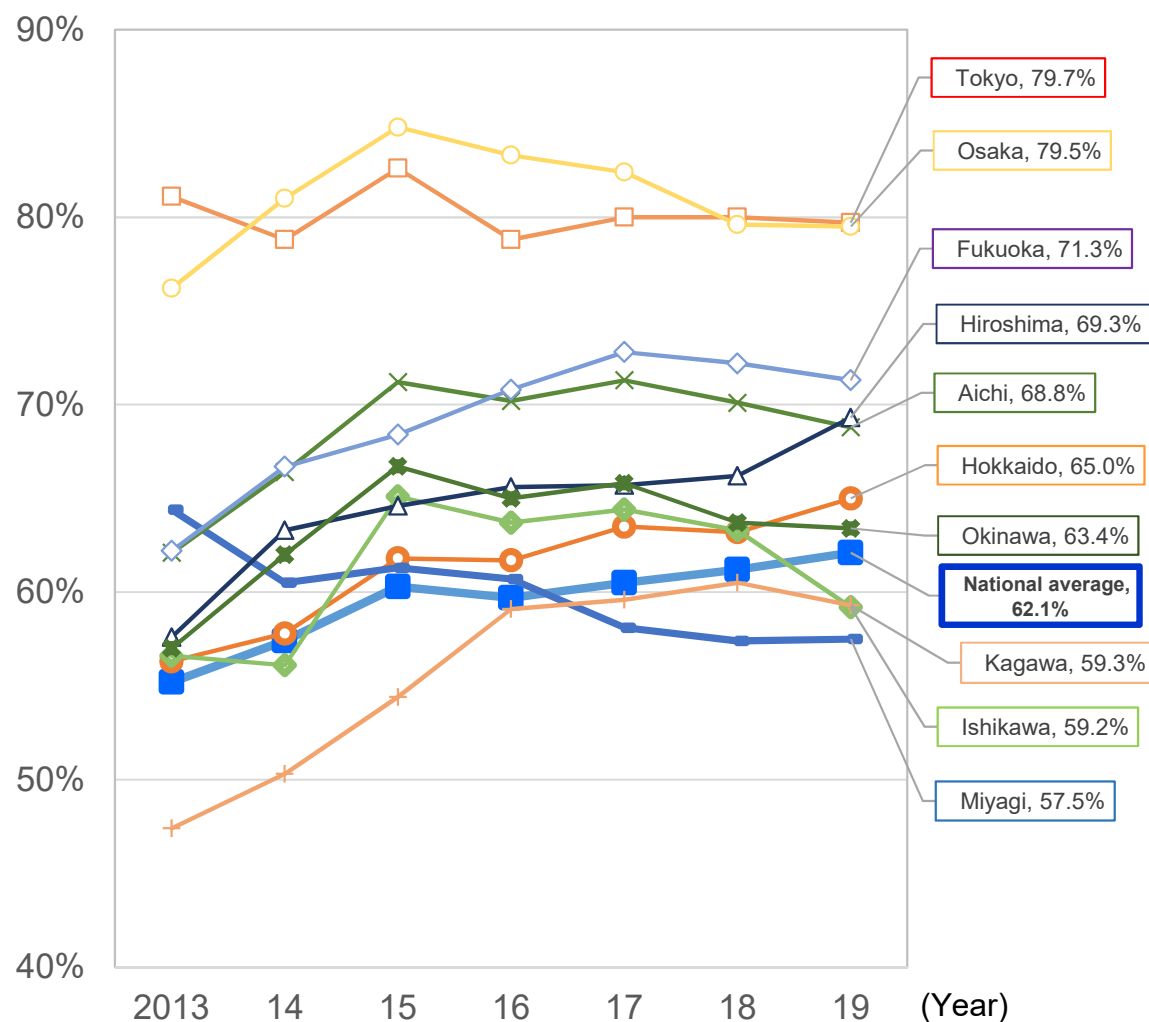
Note 1. Preliminary figures for 2019.

Note 2. "3 major metropolitan areas" refers to eight prefectures: Tokyo, Kanagawa, Chiba, Saitama, Aichi, Osaka, Kyoto, and Hyogo. "Regional areas" refers to all other prefectures.

# Part I: Tourism Trends in Japan (Overnight Trips) (2)

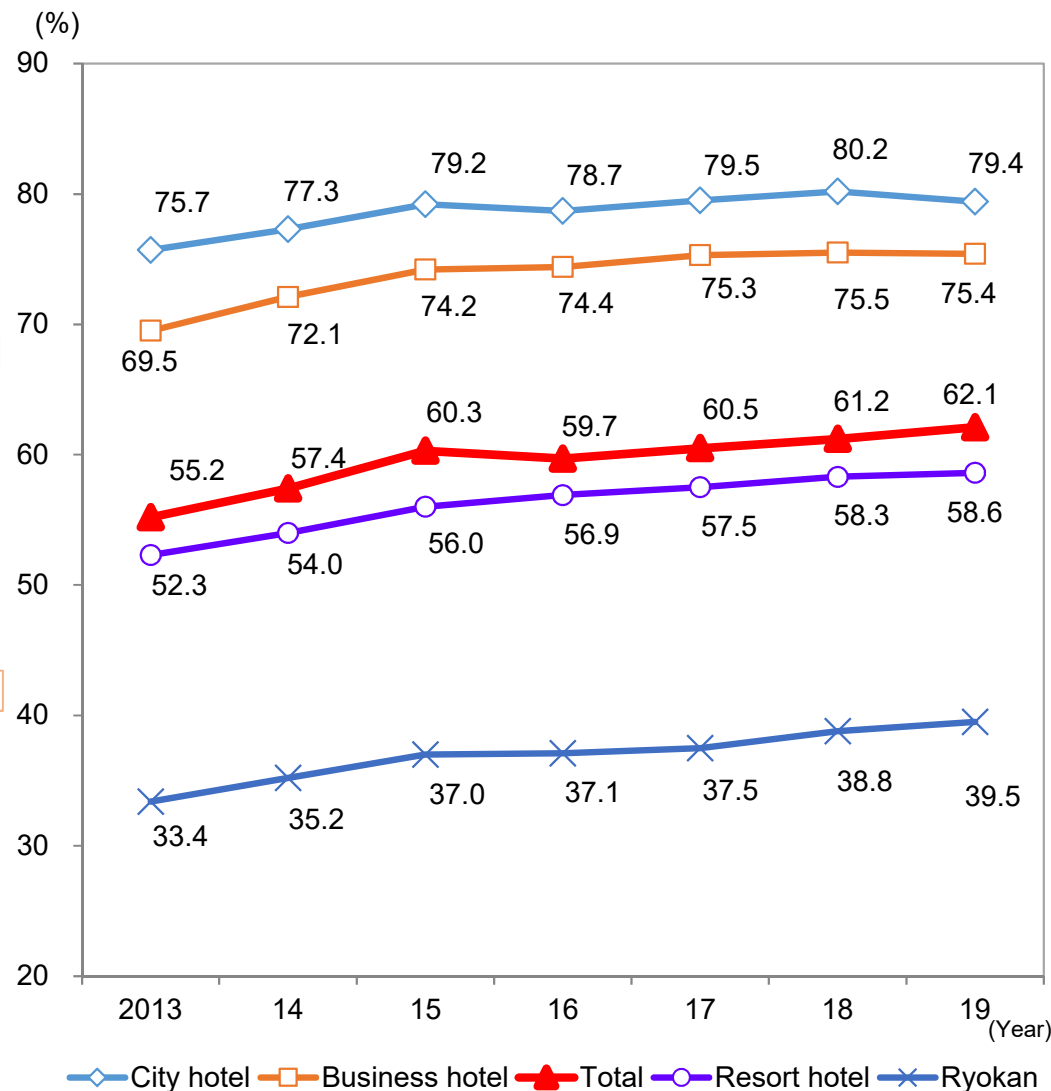
- In 2019, the national average for room occupancy rates rose to **62.1%**, increasing from **61.2%** in 2018. In particular, the rates were high in Tokyo at 79.7%, and Osaka at 79.5%.
- By accommodation type, the rates for “city hotel,” “business hotel” and ryokan were 79.4%, 75.4% and 39.5%, respectively.

(Figure I-35) Room Occupancy Rates



Source: Overnight Travel Statistics Survey (JTA)  
Note 1. Preliminary figures for 2019.

(Figure I-36) Room Occupancy Rates by Accommodation Type



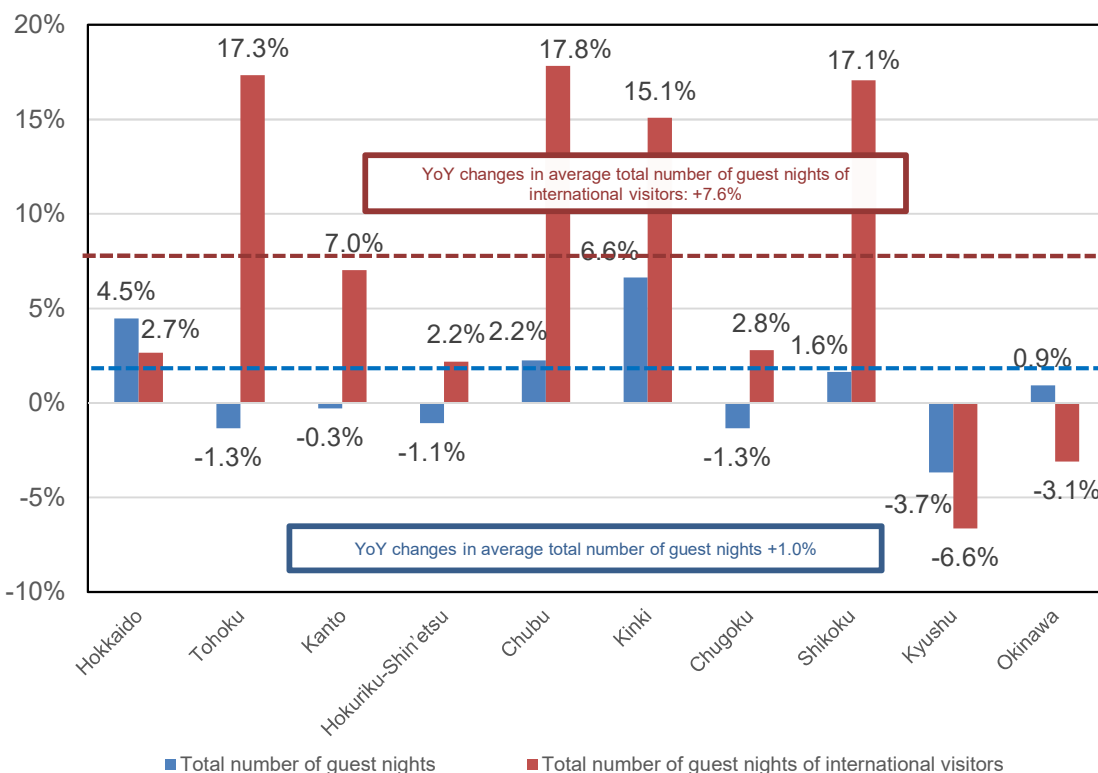
Source: Overnight Travel Statistics Survey (JTA)  
Note 1. Preliminary figures for 2019.

# Part I: Tourism Trends in Japan (Tourism Trends in Regional Areas)

- In 2019, total number of stays of international visitors increased substantially in four regions: Tohoku (17.3%), Chubu (17.8%), Kinki (15.1%) and Shikoku (17.1%). In contrast, in Kyushu and Okinawa, the number dropped, mainly due to many South Koreans refraining from visiting Japan.
- China ranked 1<sup>st</sup> in four regions (Hokkaido, Kanto, Chubu, and Kinki), South Korea in Kyushu, and Taiwan in five regions (Tohoku, Hokuriku-Shin'etsu, Chugoku, Shikoku, and Okinawa).

(Figure I-43)

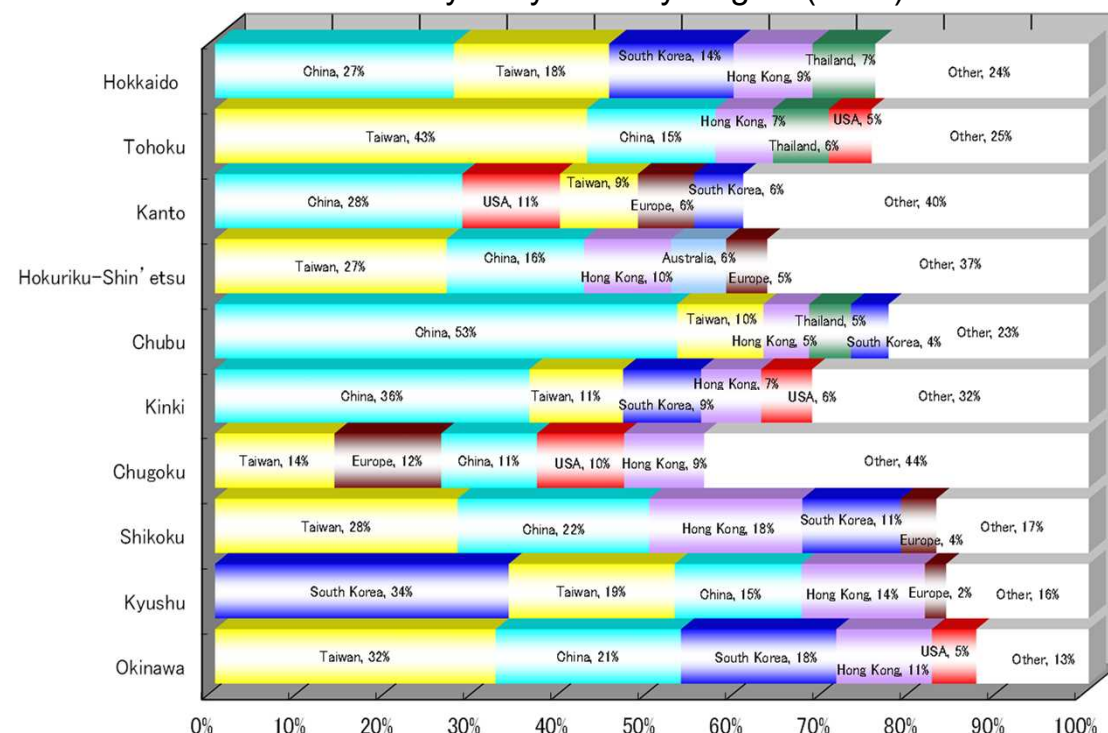
YoY Changes in Total Number of Nights Stayed  
(Overall/International Visitors) in Japan by Region (2019)



Source: Overnight Travel Statistics Survey (JTA)  
 Note 1. Final estimate figures for 2018 and preliminary figures for 2019.

(Figure I-44)

Regional Breakdown of Total Number of Nights of International Visitors' stayed by Country/Region (2019)



Source: Overnight Travel Statistics Survey (JTA)  
 Note 1. Preliminary figures for 2019.  
 Note 2. "Europe" refers to six countries: Germany, UK, France, Russia, Italy, and Spain.

## [Part II]

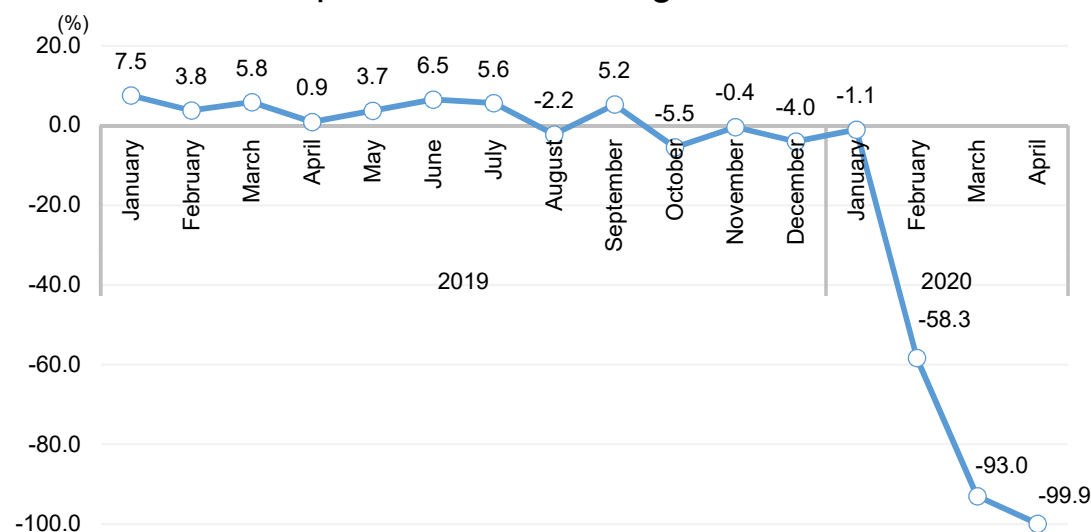
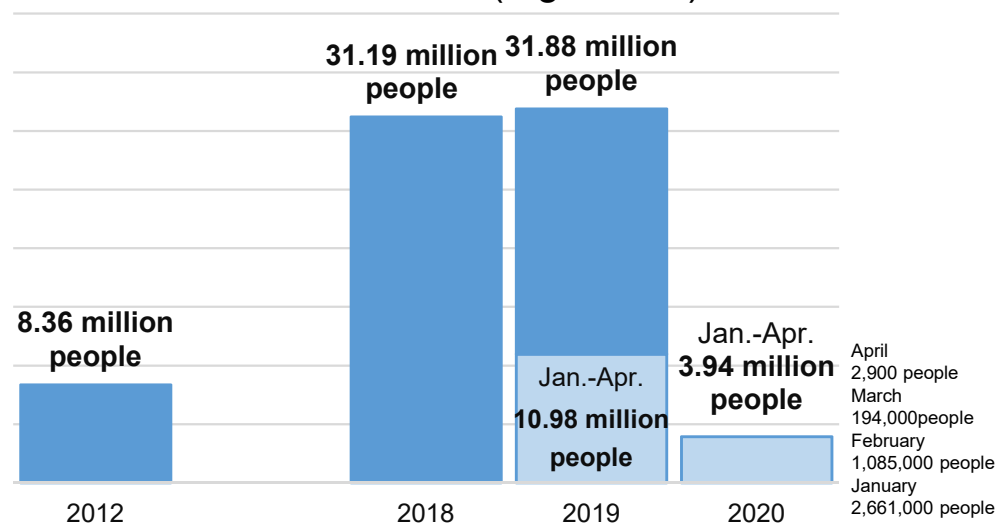
# Responding to the Impact of COVID-19 and Restarting Regional Revitalization through Tourism

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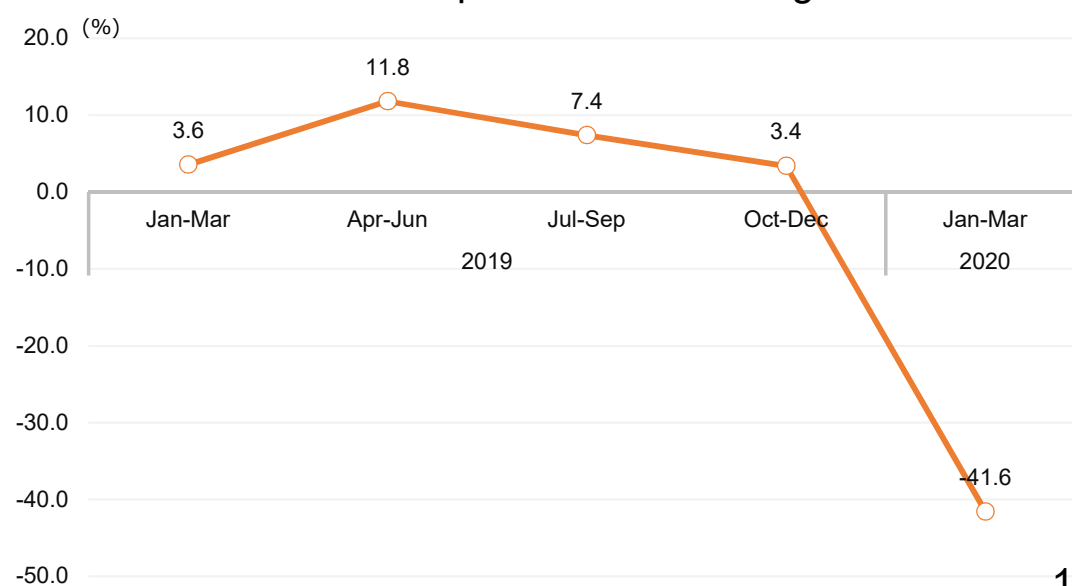
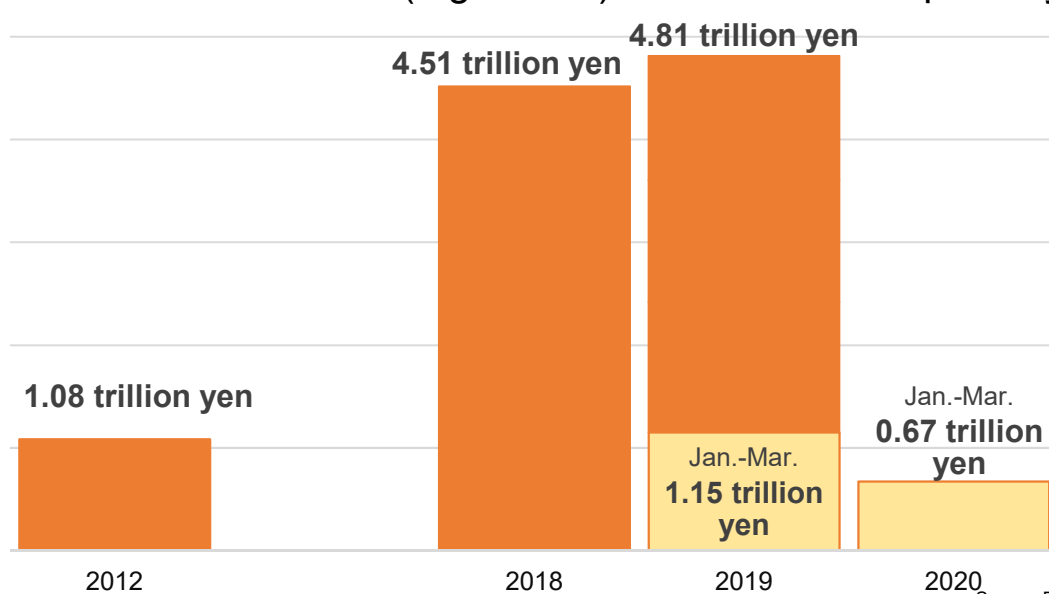
# Part II: Impact of COVID-19 on Tourism and the Countermeasures (1)

○ As a result of entry restrictions to control the COVID-19 outbreak, the number of international visitors to Japan in April 2020 plunged by 99.9% year on year to 2,900, and tourism consumption by international visitors for the January-March 2020 period decreased by 41.6%.

(Figure II-1) Number of International Visitors to Japan and YoY Changes



(Figure II-2) Tourism Consumption by International Visitors to Japan and YoY Changes

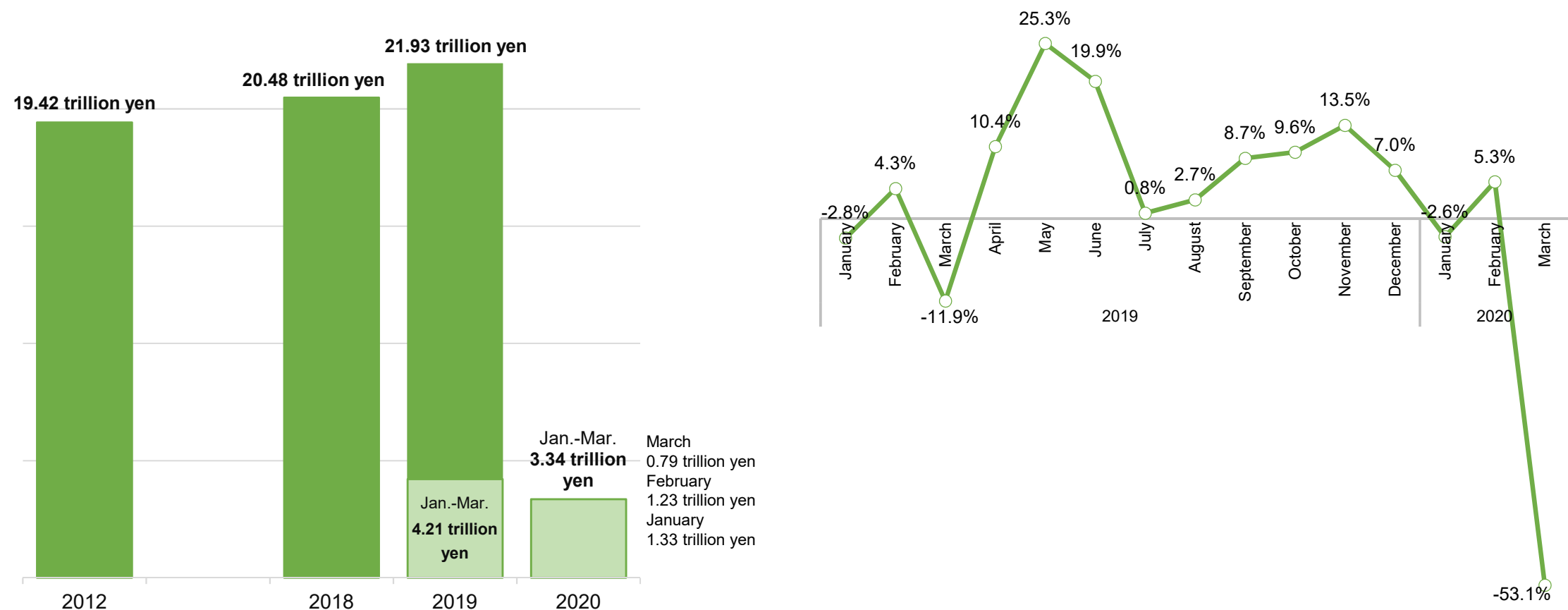


Source: Prepared by the JTA based on data from the JNTO on the number of international visitors to Japan and International Visitor Survey (JTA)

# Part II: Impact of COVID-19 on Tourism and the Countermeasures (2)

○ Japanese domestic tourism consumption was 786.4 billion yen in March 2020, decreasing by 53.1% from March 2019.

(Figure II-3) Japanese Domestic Tourism Consumption and YoY Changes



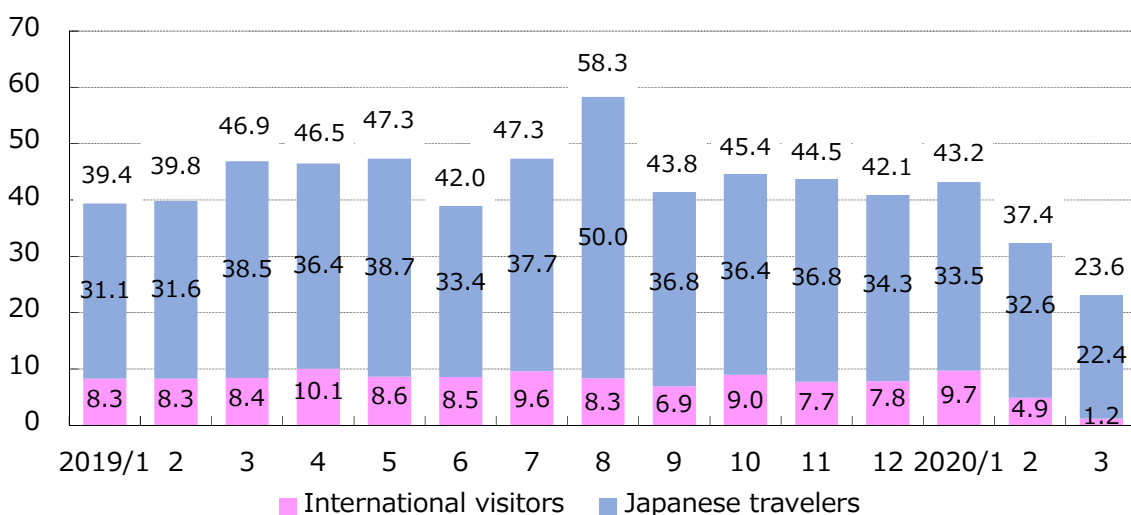


# Part II: Impact of COVID-19 on Tourism and the Countermeasures (3)

- Total number of nights stayed in March 2020 was 23.61 million, declining by 49.6% from March 2019.
- Room occupancy rates plunged to 31.9% in March 2020.

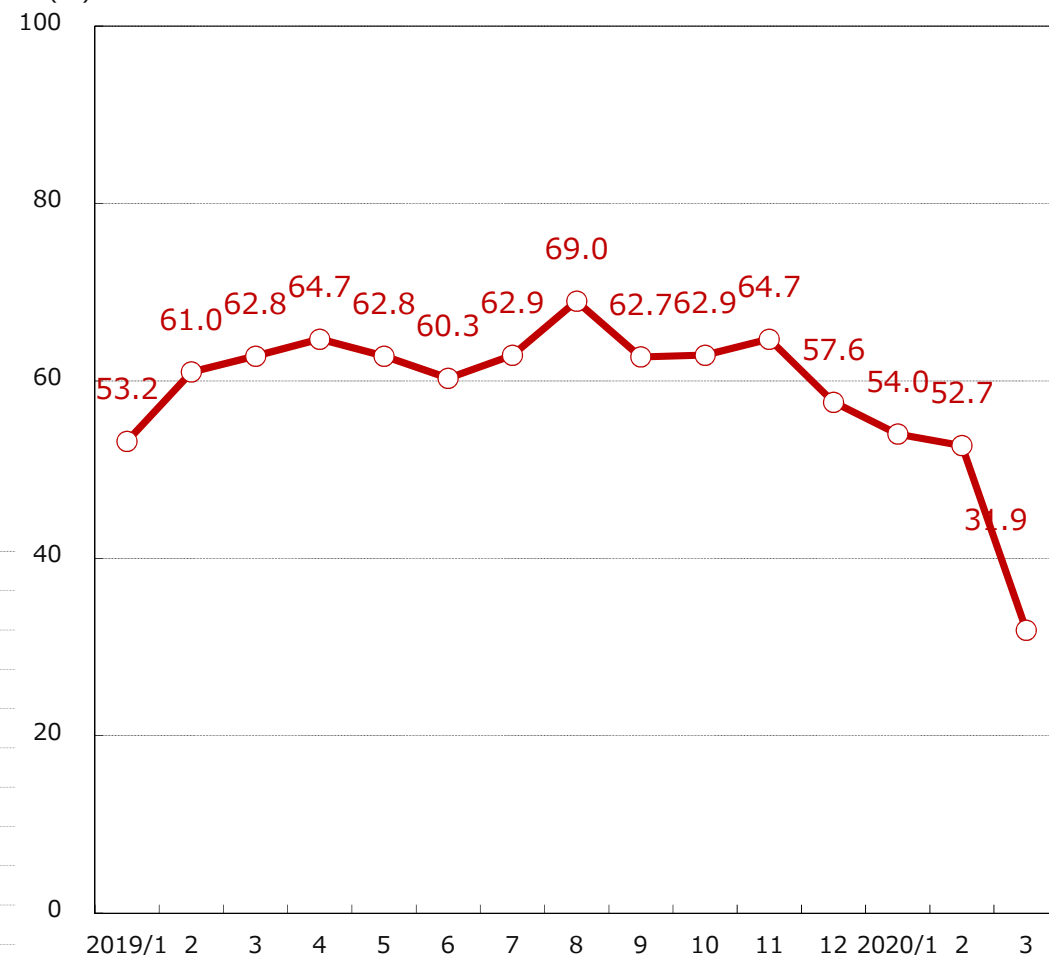
(Figure II-4) Total Number of Nights Stayed

(million guest nights)



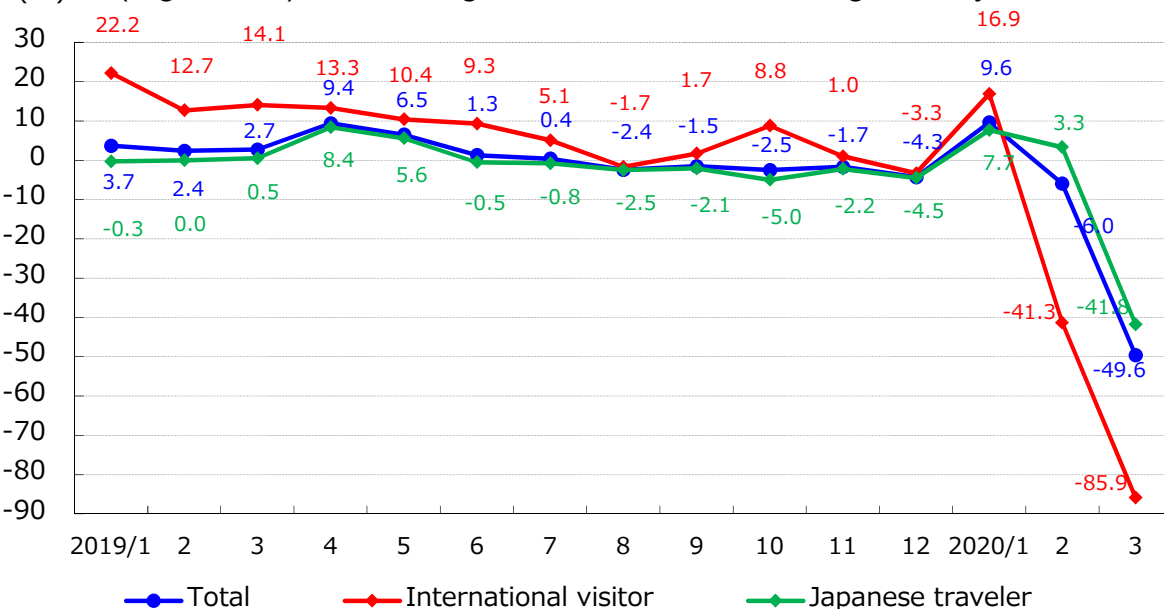
(Figure II-5) Room Occupancy Rates

(%)



(Figure II-4) YoY Changes in Total Number of Nights Stayed

(%)

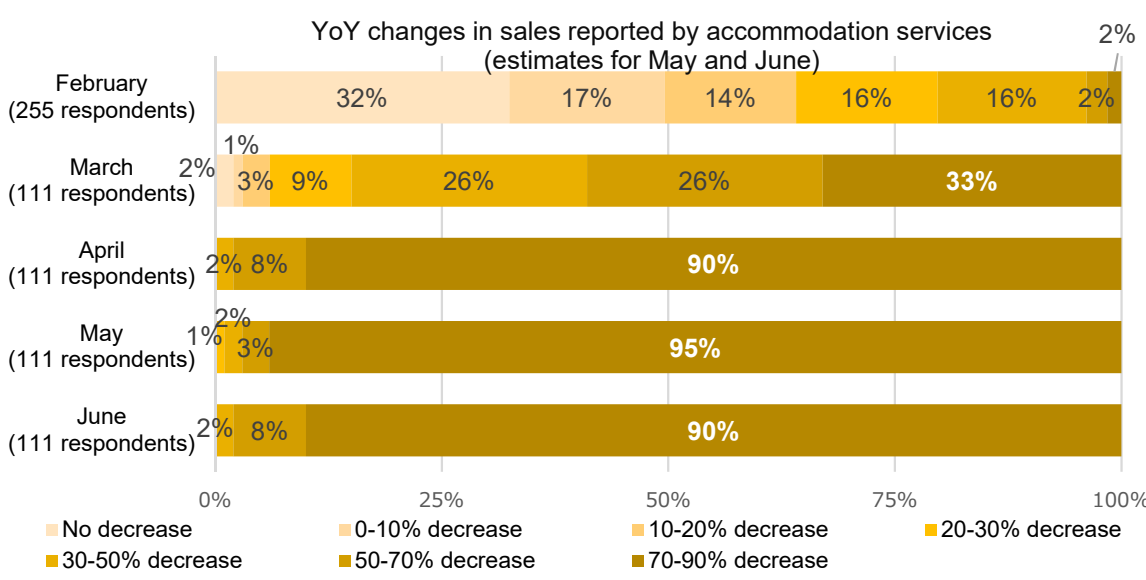
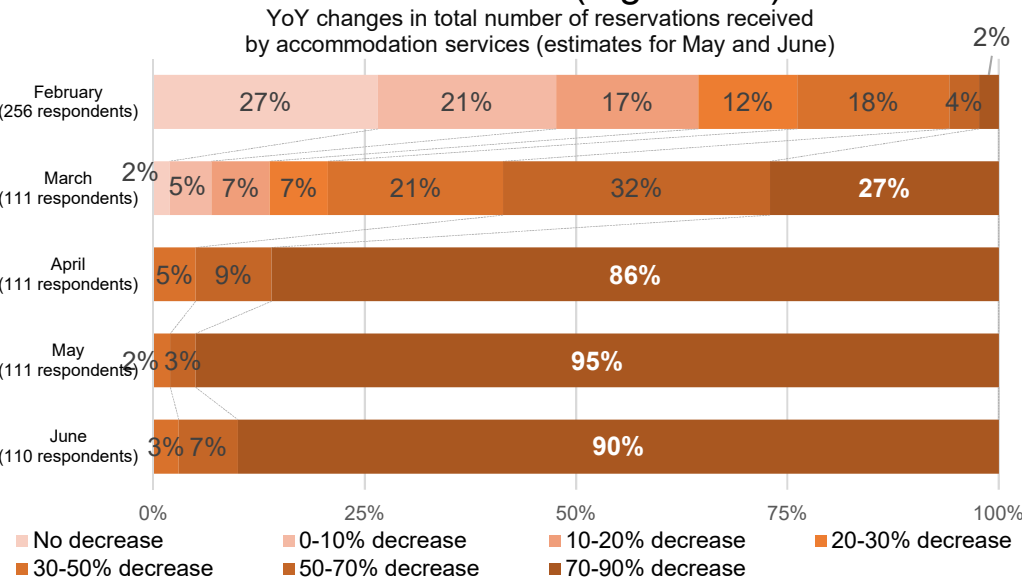


Source: Prepared by the JTA based on data from Overnight Travel Statistics Survey (JTA)  
Note 1. Secondary Preliminary figures for January 2019 to February 2020; Primary Preliminary figures for March 2020.

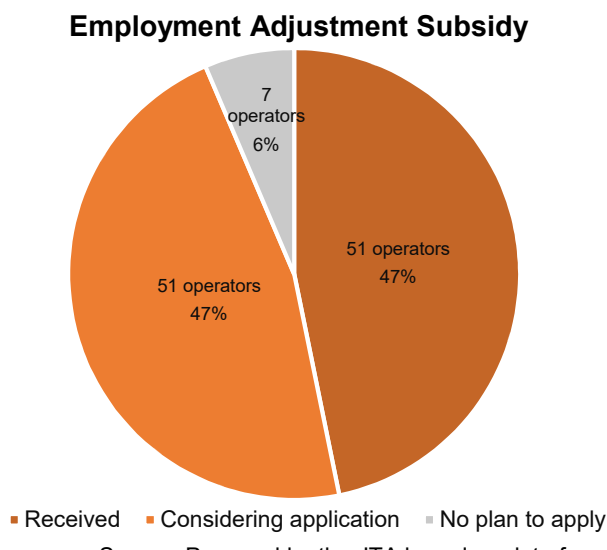
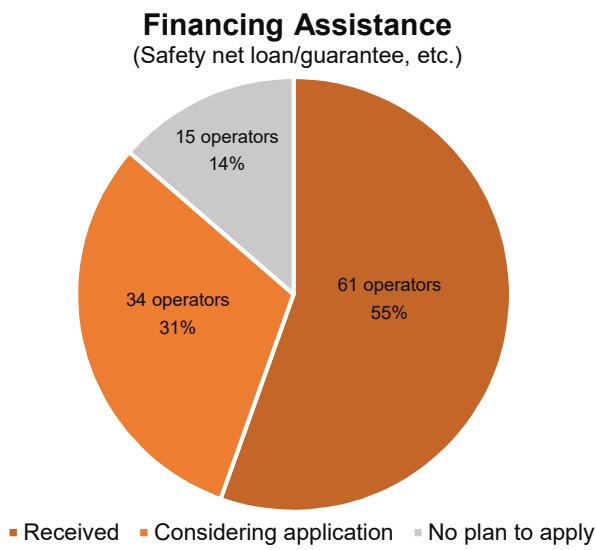
# Part II: Impact of COVID-19 on Tourism and the Countermeasures (4)

- According to surveys of accommodation services, the percentage of respondents reporting a 70% or more decline in the number of reservations received was 2% for February and 30% for March. The percentage jumped to 90% for April onwards, after the national state of emergency was declared.
- About 50% of accommodation providers have already used government financial assistance programs, while about 40% plan to do so.

(Figure II-6) COVID-19 Impact on Accommodation Services



## Usage of Government Financial Assistance Programs

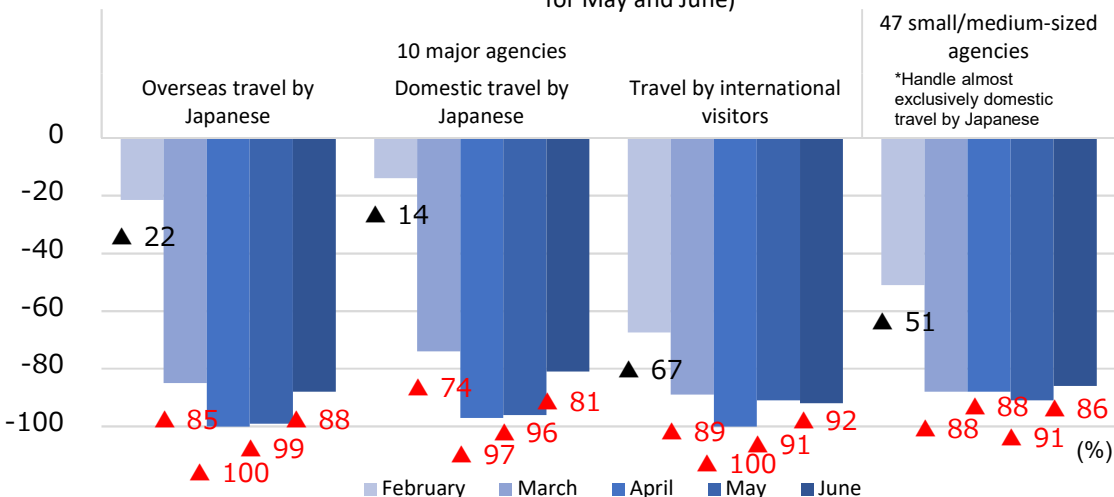


# Part II: Impact of COVID-19 on Tourism and the Countermeasures (5)

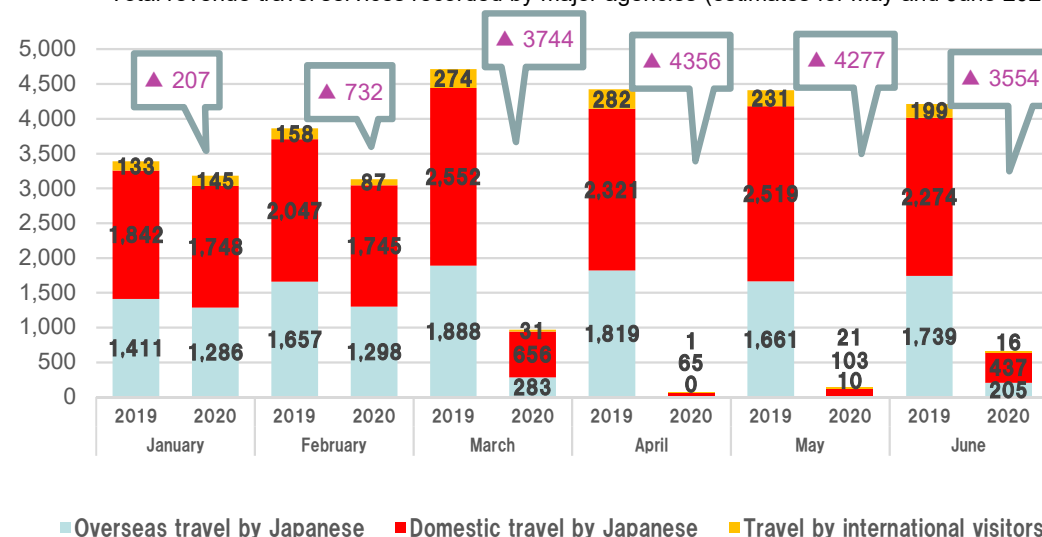
- The number of reservations handled by major travel agencies in April and May 2020 decreased by more than 90% year on year. In particular, that for Japanese overseas travelers and international visitors to Japan declined to zero in April.
- The number of reservations handled by small and medium-sized travel agencies plunged by 88% in April and is expected to drop by a severer 91% in May.
- About 40% of these agencies have already used government financial assistance programs, while about 50% plan to do so.

(Figure II-7) COVID-19 Impact on Travel Services

YoY changes in total number of reservations handled by travel agencies (estimates for May and June)

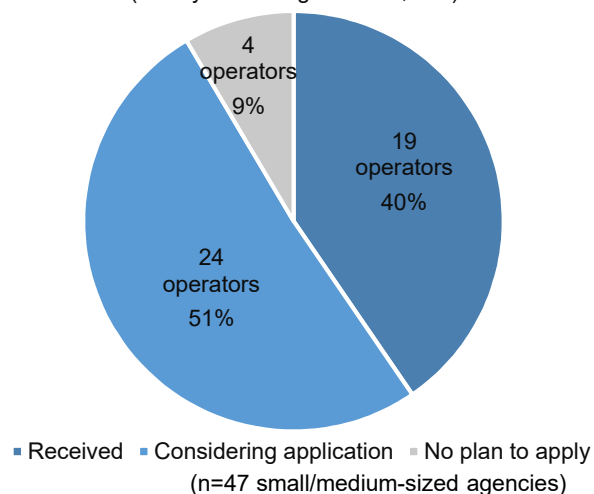


Total revenue travel services recorded by major agencies (estimates for May and June 2020)

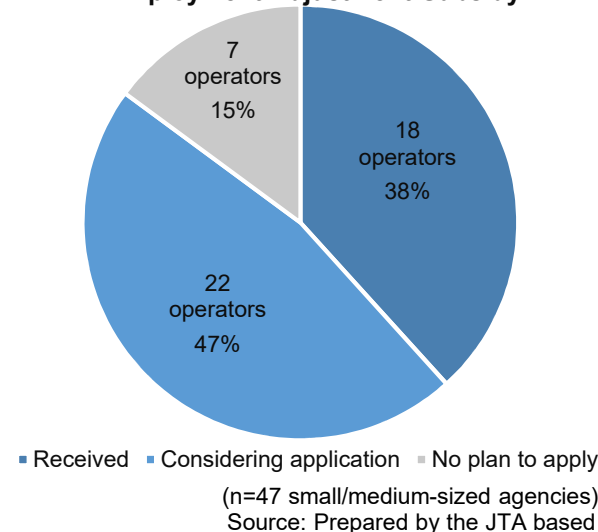


## Usage of Government Financial Assistance Programs

### Financing Assistance (Safety net loan/guarantee, etc.)



### Employment Adjustment Subsidy

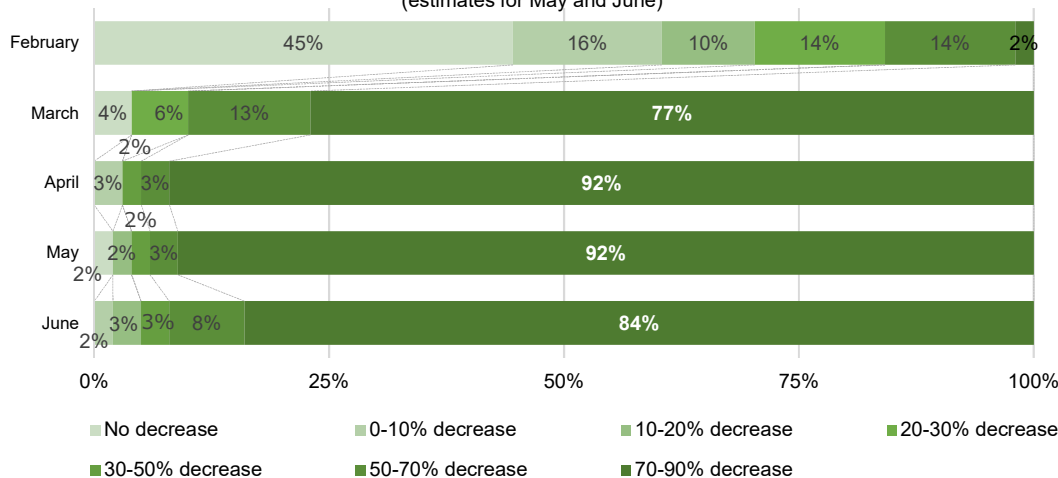


# Part II: Impact of COVID-19 on Tourism and the Countermeasures (6)

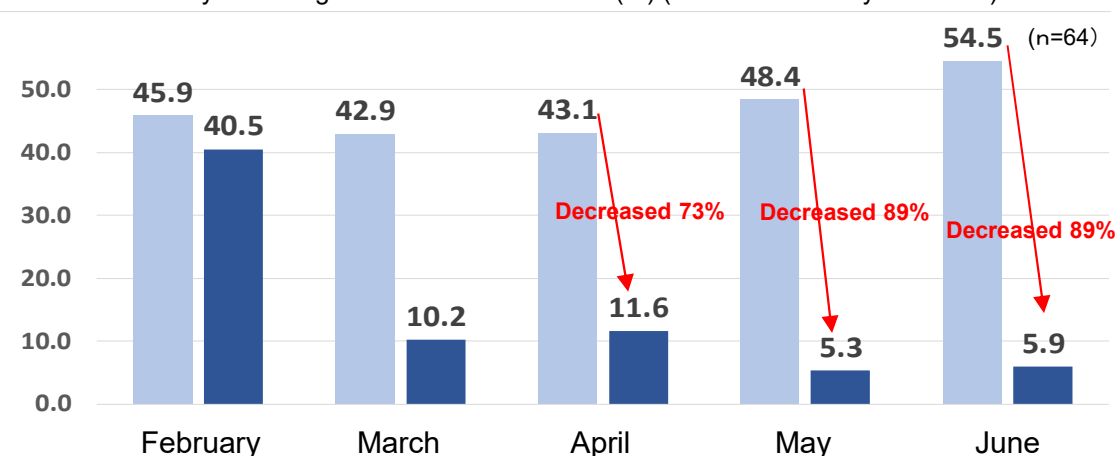
- In the charter bus service sector, around 80% of operators faced a year-on-year decrease of 70% or more in transportation services revenue in March. This figure increased to 90% in April after the national state of emergency was declared, and is expected to remain at a severe level from May onwards.
- The fleet utilization rate is expected to decline by 95% from May onwards.

(Figure II-8) COVID-19 Impact on Charter Bus Services

Charter bus transportation services revenue (YoY changes)  
(estimates for May and June)

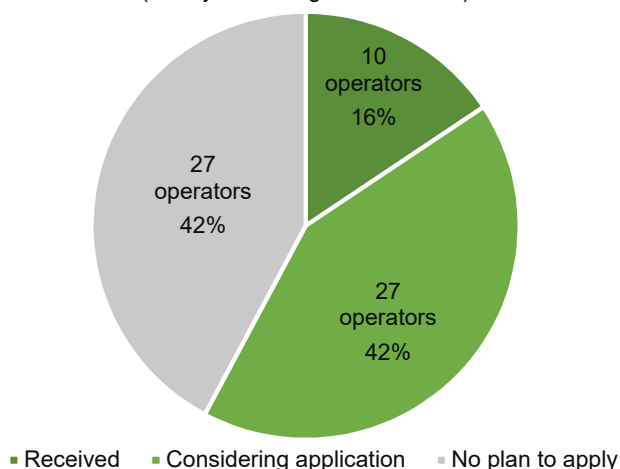


Year-on-year changes in fleet utilization rate (%) (estimates for May and June)

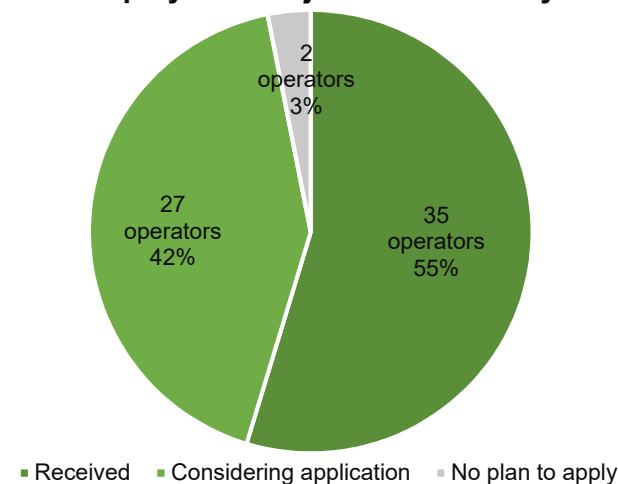


## Usage of Government Financial Assistance Programs

Financing Assistance  
(Safety net loan/guarantee, etc.)

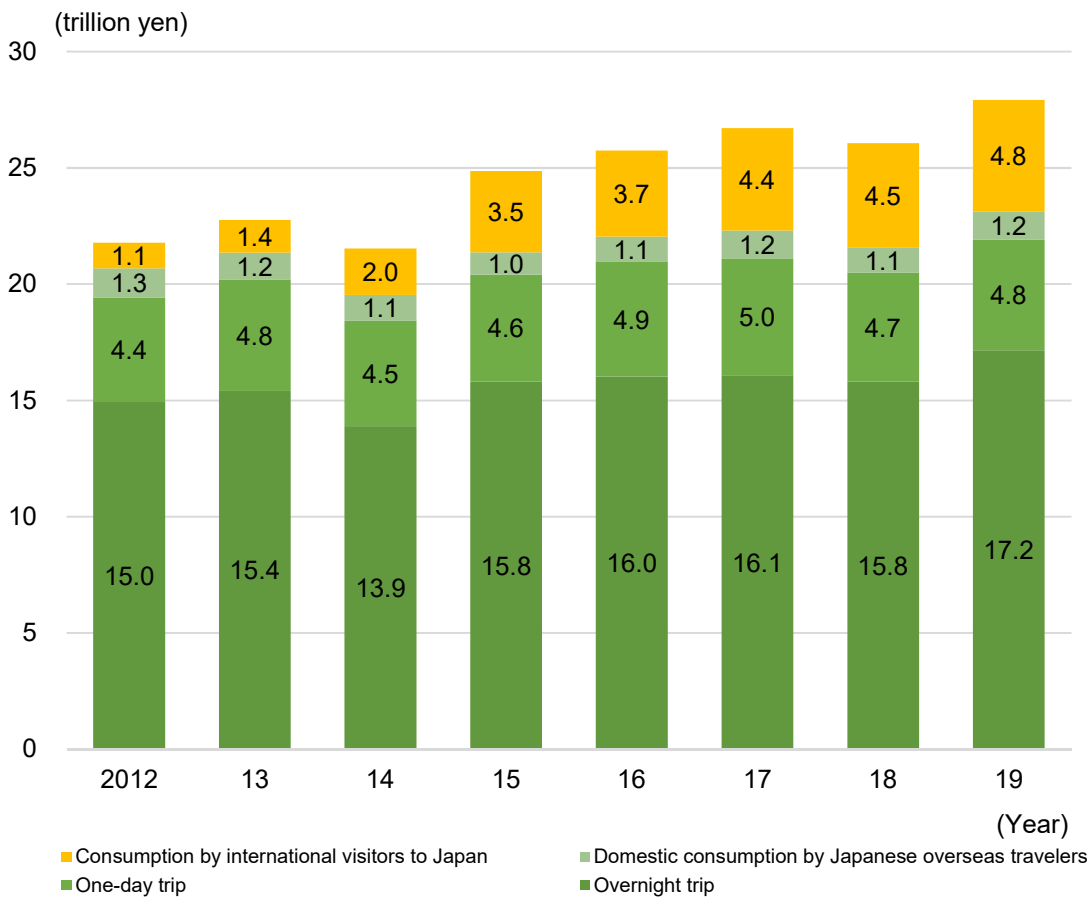


Employment Adjustment Subsidy

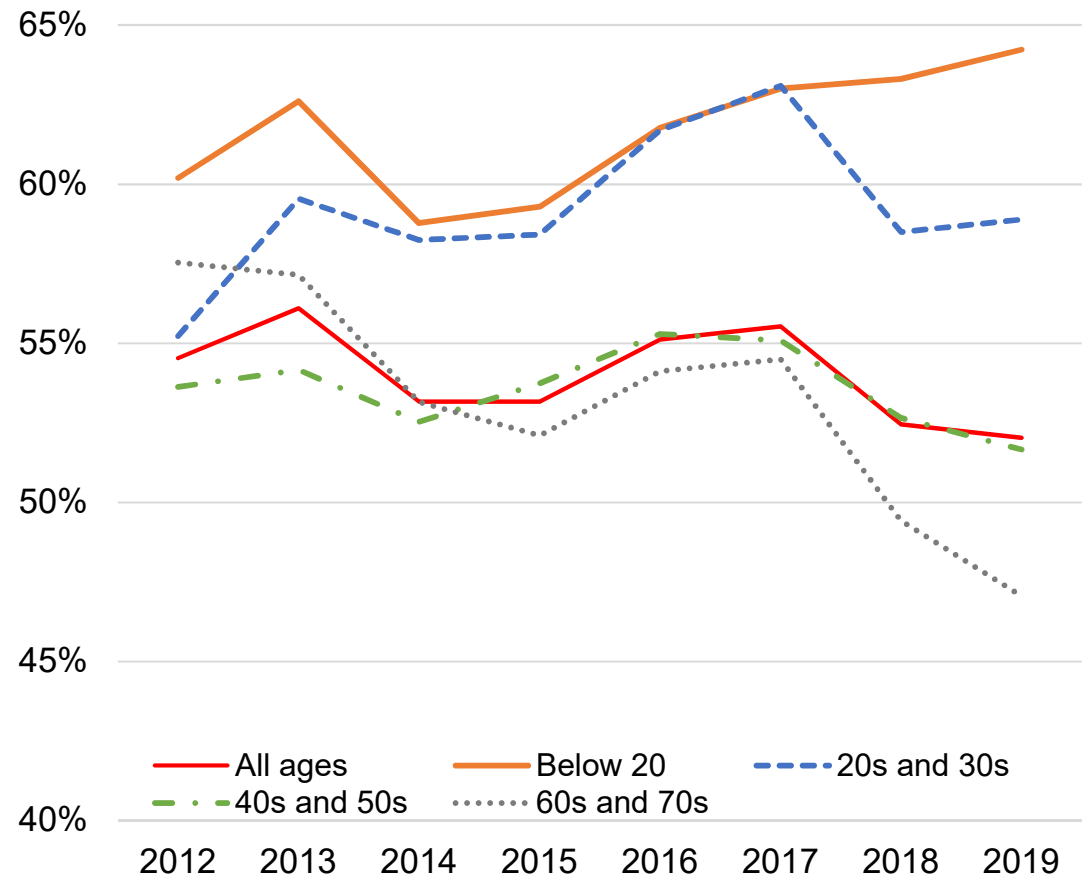


- The first step to restarting regional revitalization through tourism will be to boost demand for Japanese domestic tourism as soon as possible once the COVID-19 situation begins to settle down.
- Japanese domestic travelers account for more than 80% of Japan's tourism consumption, and 60% is related to visits to regional areas.
- The percentage of Japanese below the age of 40 who have travel experience has been on the rise recently. This trend is particularly evident in those below 20.

(Figure II-10) Domestic Tourism Consumption in Japan



(Figure II-12) Percentage of Japanese with Domestic Overnight Travel Experience

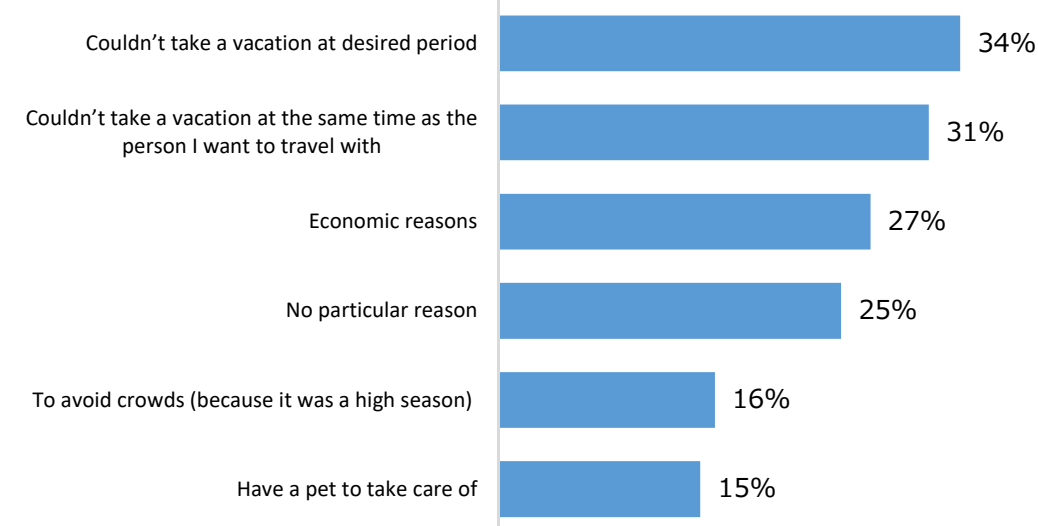


Note: "Regional areas" refers to prefectures excluding Saitama, Chiba, Tokyo, Kanagawa, Aichi, Kyoto, Osaka and Hyogo.

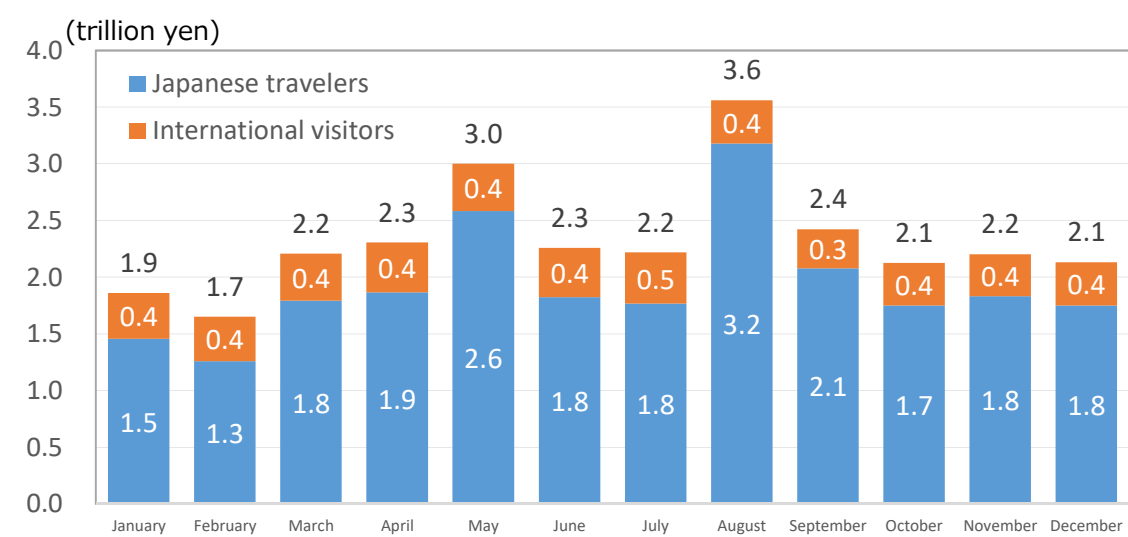
Source: Prepared by the JTA based on data from National Tourism Survey (JTA)

- Major factors inhibiting tourism are associated with the timing of taking holidays, which tend to be concentrated at certain periods of the year. Therefore, it is important to encourage dispersion of holidays.
- The number of Japanese taking domestic overnight trips has not increased in recent years, while total consumption and per-capita consumption have been on the rise. It is important to offer value-added travel plans and services in the face of population decrease.

(Figure II-14) Factors Inhibiting Tourism (2019)

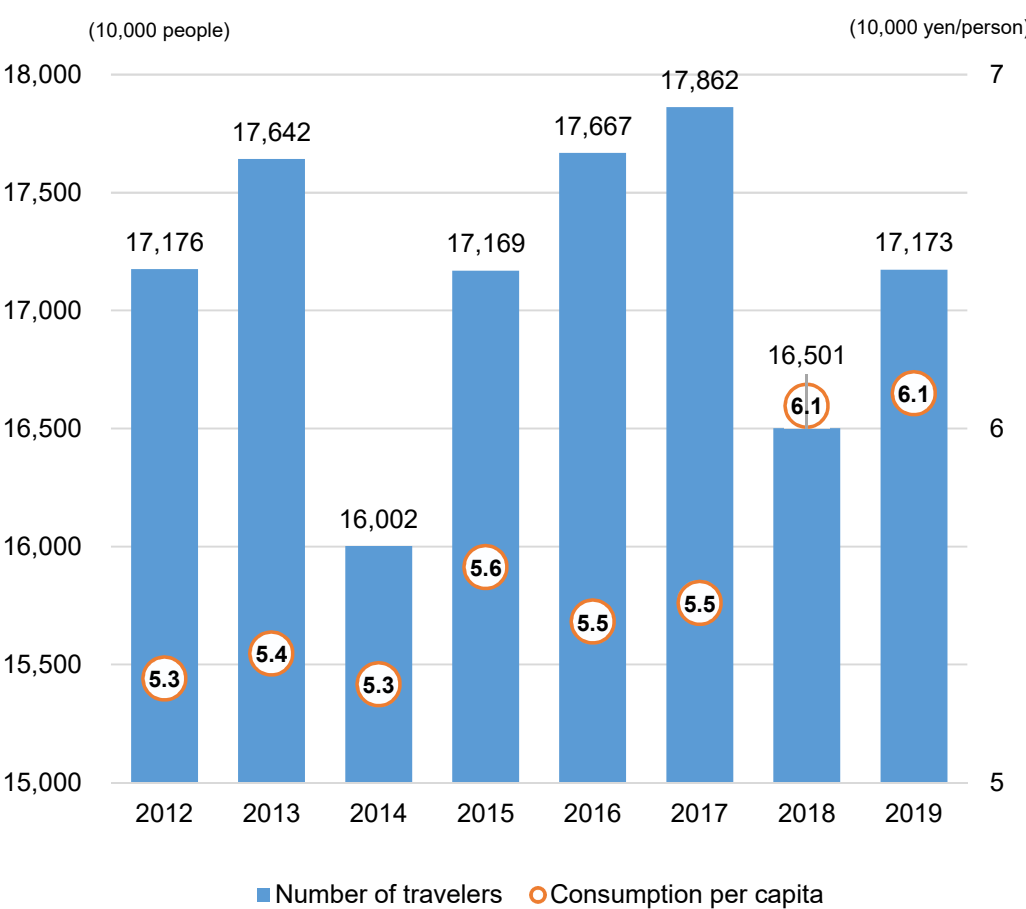


(Figure II-15) Domestic Tourism Consumption in Japan by Month (2019)



(Figure II-17)

Number of Japanese Taking Domestic Overnight Trips and Per-capita Consumption

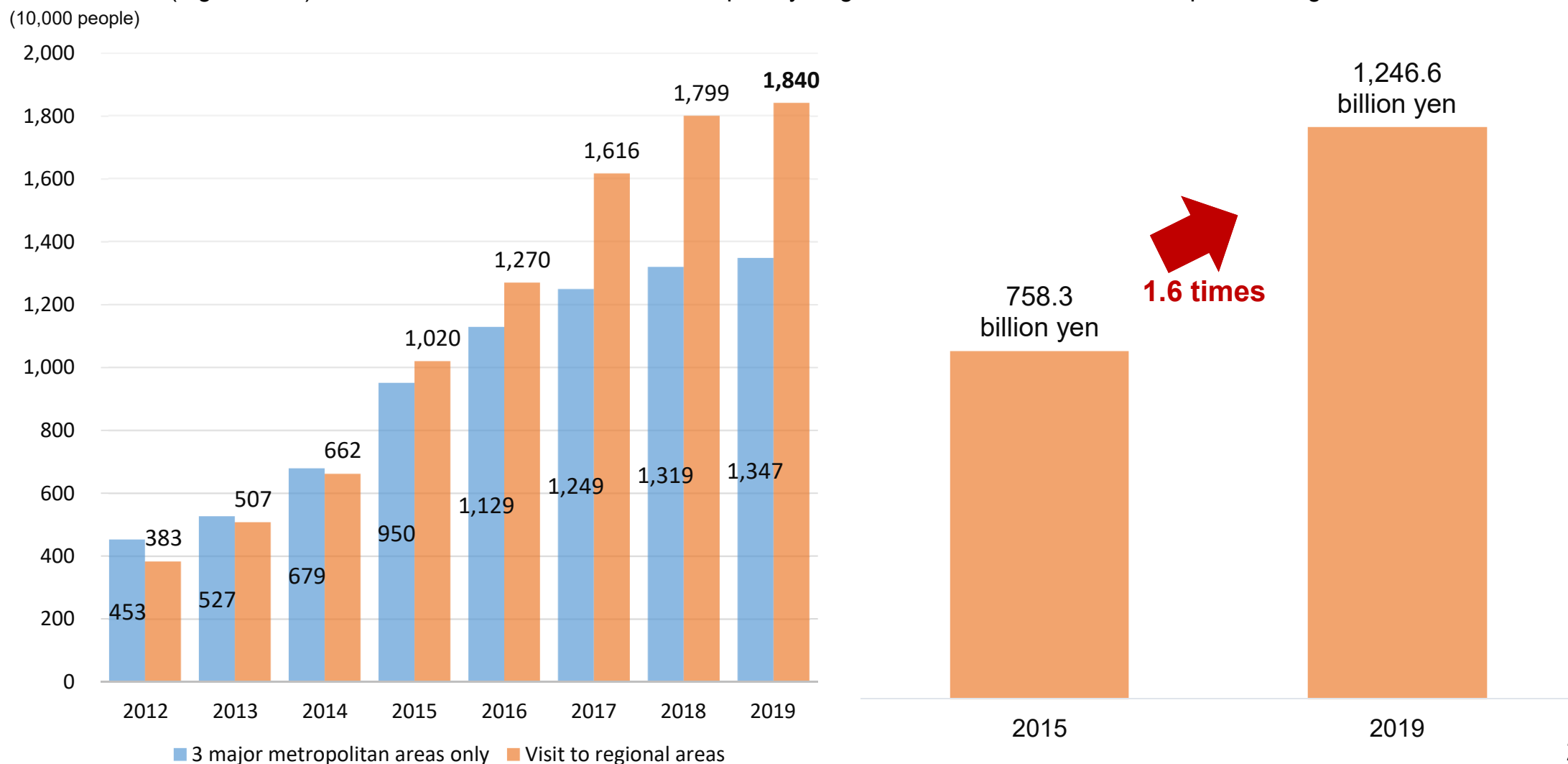


Source: Prepared by the JTA based on data from the JNTO, National Tourism Survey (JTA), International Visitor Survey (JTA), and 2019 Annual Report on the Tourism Trends Survey (JTBF)

## Part II: Situation of International Visitors to Regional Areas

- Number of international visitors to regional areas in Japan has been increasing year by year, reporting 18.40 million in 2019. Regional areas have been a driving force of increase of the number of international visitors to Japan, particularly since 2016.
- In 2019, inbound tourism consumption in regional areas increased 1.6 fold compared with 2015.

(Figure II-19) Number of International Visitors to Japan by Region and Their Tourism Consumption in Regional Areas



Source: International Visitor Survey (JTA)

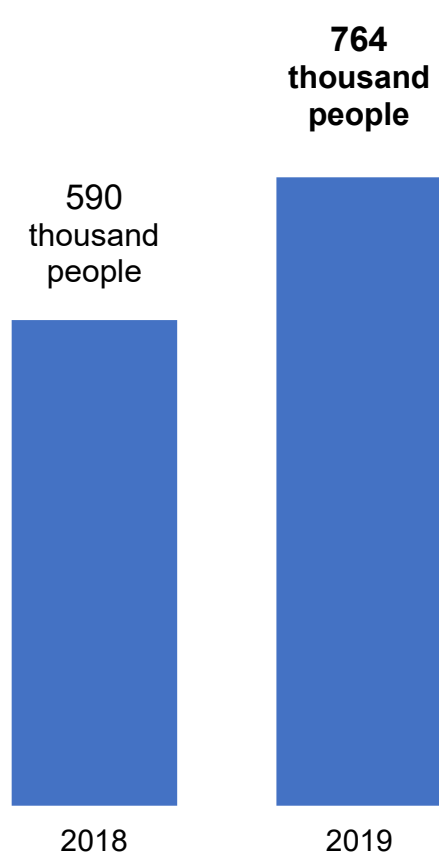
Note: "Regional areas" refers to prefectures excluding Saitama, Chiba, Tokyo, Kanagawa, Aichi, Kyoto, Osaka and Hyogo.

# Part II: International Visitors coming to Japan to Watch 2019 Rugby World Cup

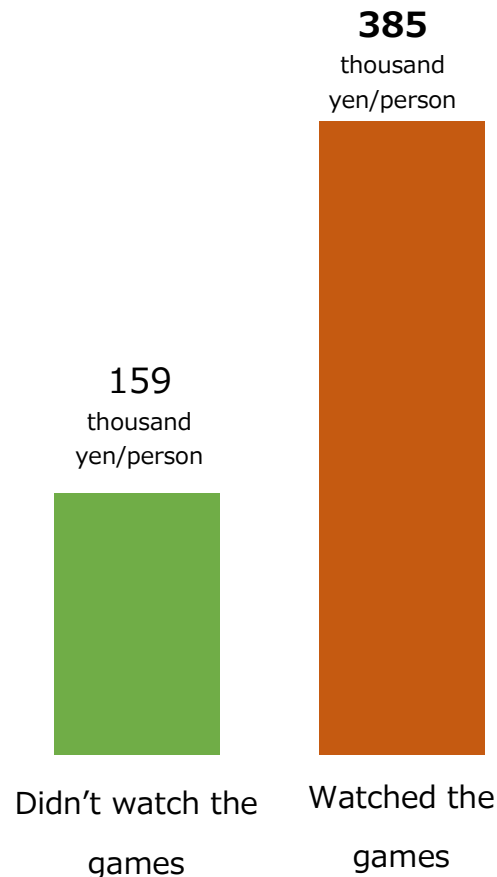
## Matches: Consumption and Visits to Regional Areas

- The 2019 Rugby World Cup (RWC) provided a golden opportunity to attract international visitors, having a remarkable impact on local economies.
- Total number of nights international visitors from major qualifying countries stayed in regional areas was significantly larger during RWC. Per-capita consumption of international visitors related to RWC was 2.4 times as large as that of other visitors who were not.

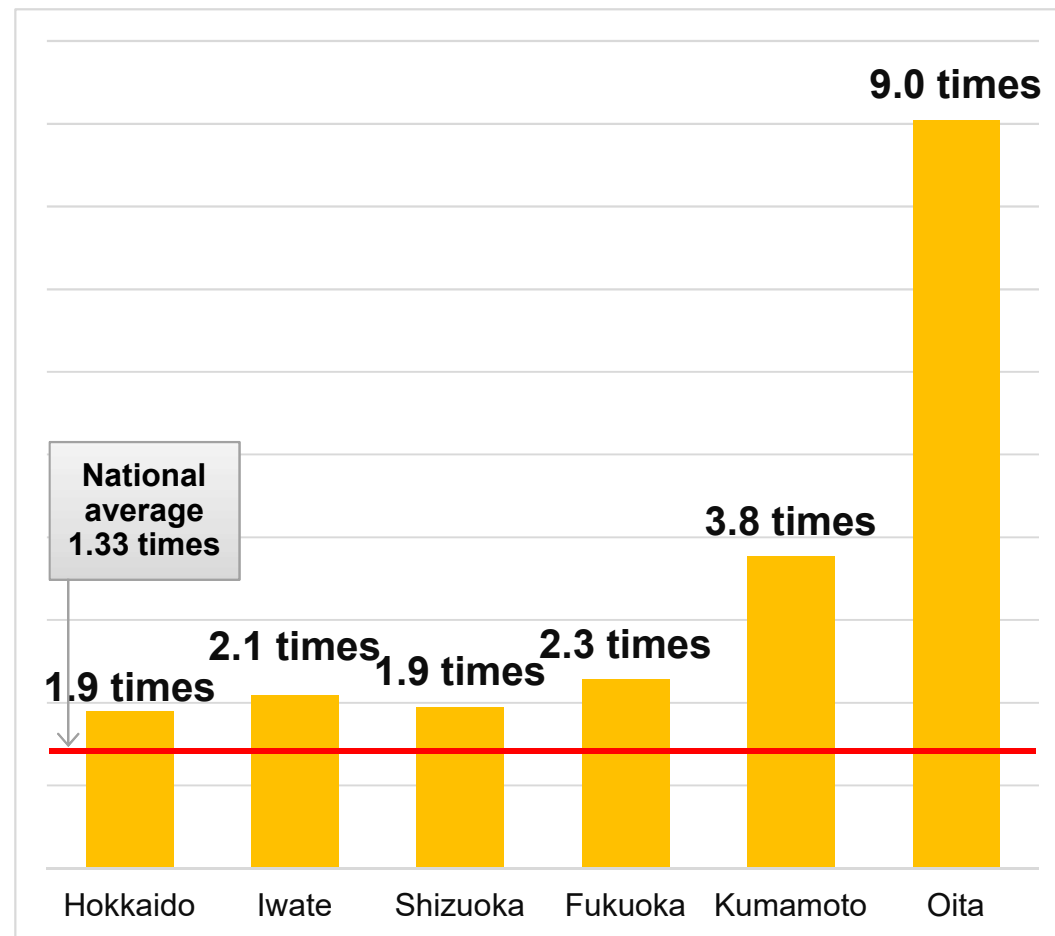
(Figure II-22)  
Change in Number of International Visitors to Japan 2019 RWC-qualified Countries



(Figure II-23)  
Per-Capita consumption by International Visitors to RWC



(Figure II-27) Changes in Total Number of Nights International Visitors from Major 2019 RWC-qualifying Countries Stayed (September and October)



Note 1. Major 2019 RWC-qualifying countries refer to the following seven countries: USA, Canada, UK, France, Russia, Australia and Italy.

Note 2. Created based on data from surveys of accommodation services with at least 10 employees.

Note 3. Preliminary figures for 2019.

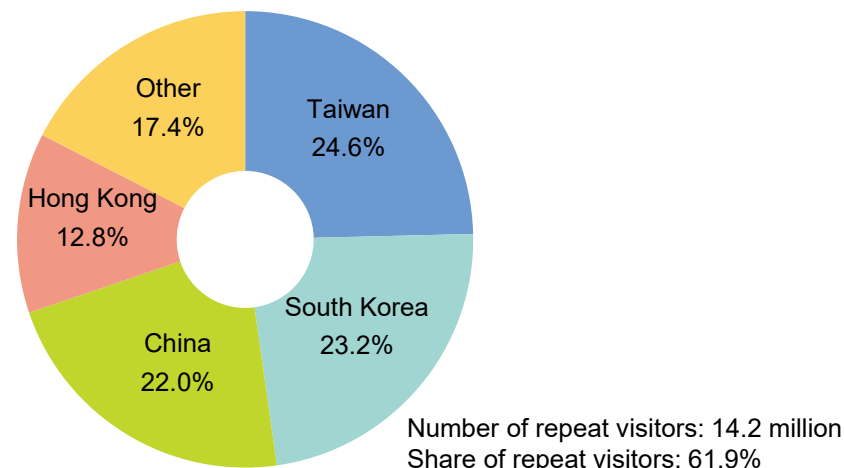




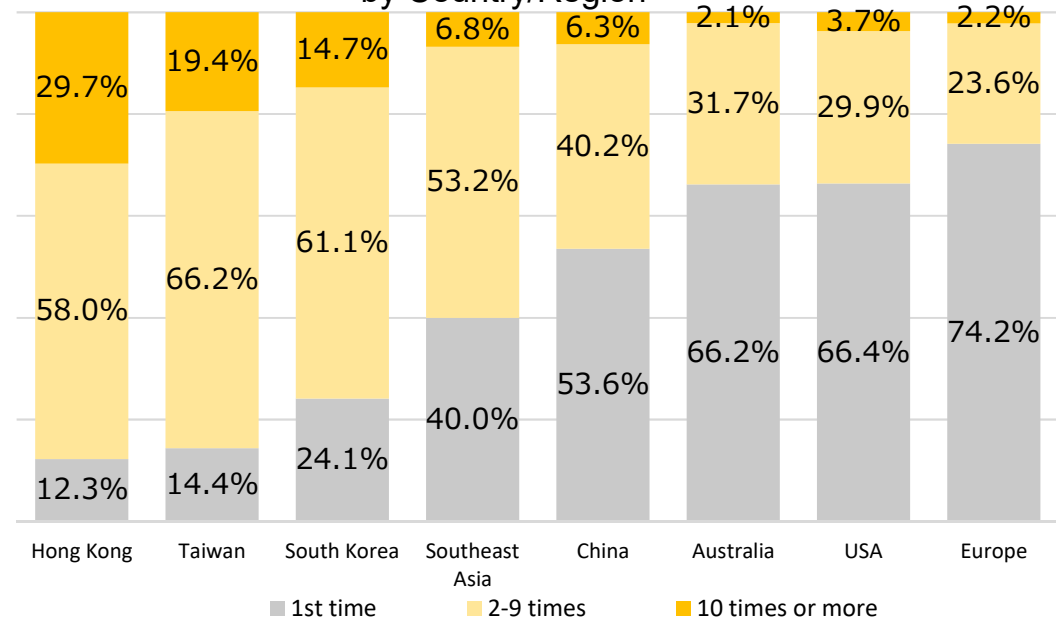
# Part II: Encouraging Repeat Visitors from East Asia to Visit Regional Areas (1)

- About 60% of international visitors to Japan are repeat visitors, and more than 80% of such visitors are from four East Asian countries/regions. Among visitors from Hong Kong and Taiwan, the percentage of visitors who visited Japan at least 10 times is high, as opposed to visitors from China, where about half of visitors are first-time visitors.
- Generally, per-capita consumption tends to grow as the number of repeat visits increases. Per-capita spending and purchase rates of local products, such as agricultural products and alcoholic beverages, by repeat visitors is high.

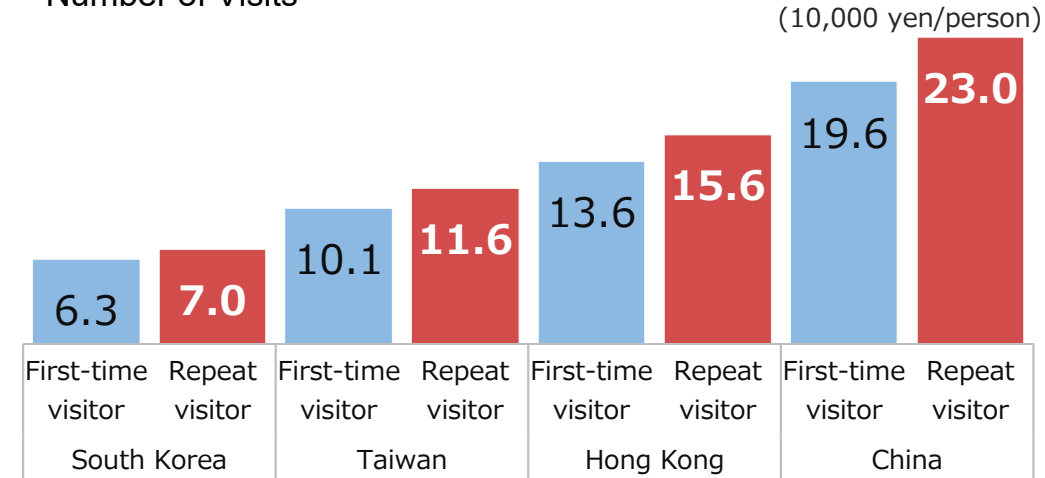
(Figure II-30) Percentage of Repeat Visitors to Japan by Country/Region



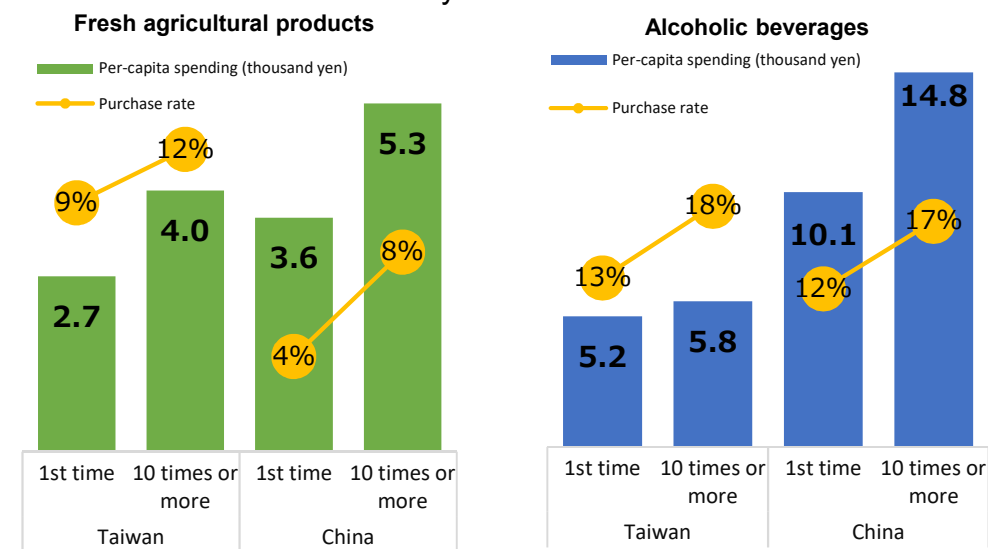
(Figure II-31) Composition of Number of Repeat Visits by Country/Region



(Figure II-33) Tourism Consumption Per Capita by Number of Visits



(Figure II-34) Per-capita Spending and Purchase Rates by Item and by Number of Visits

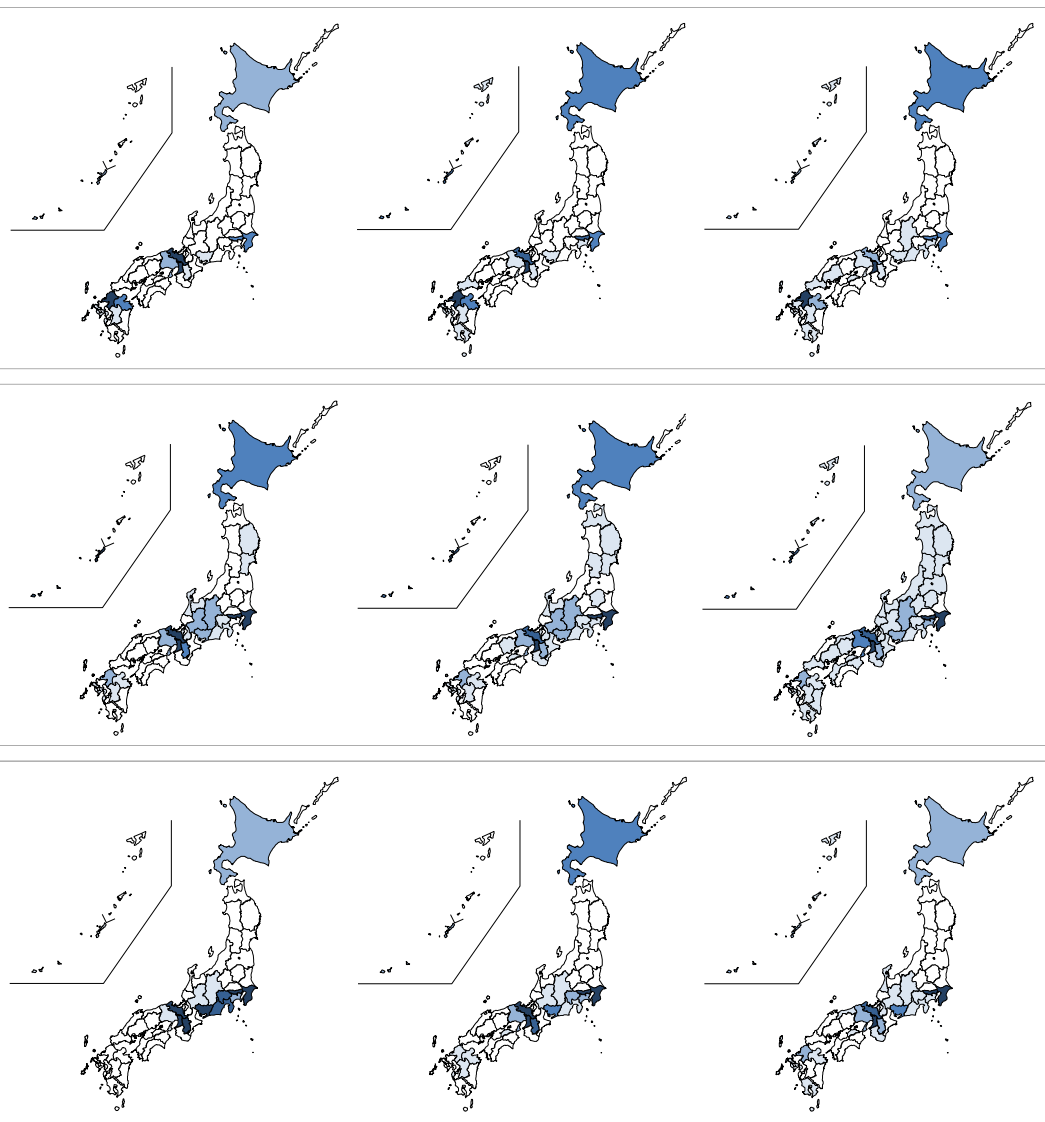


Source: International Visitor Survey (JTA)

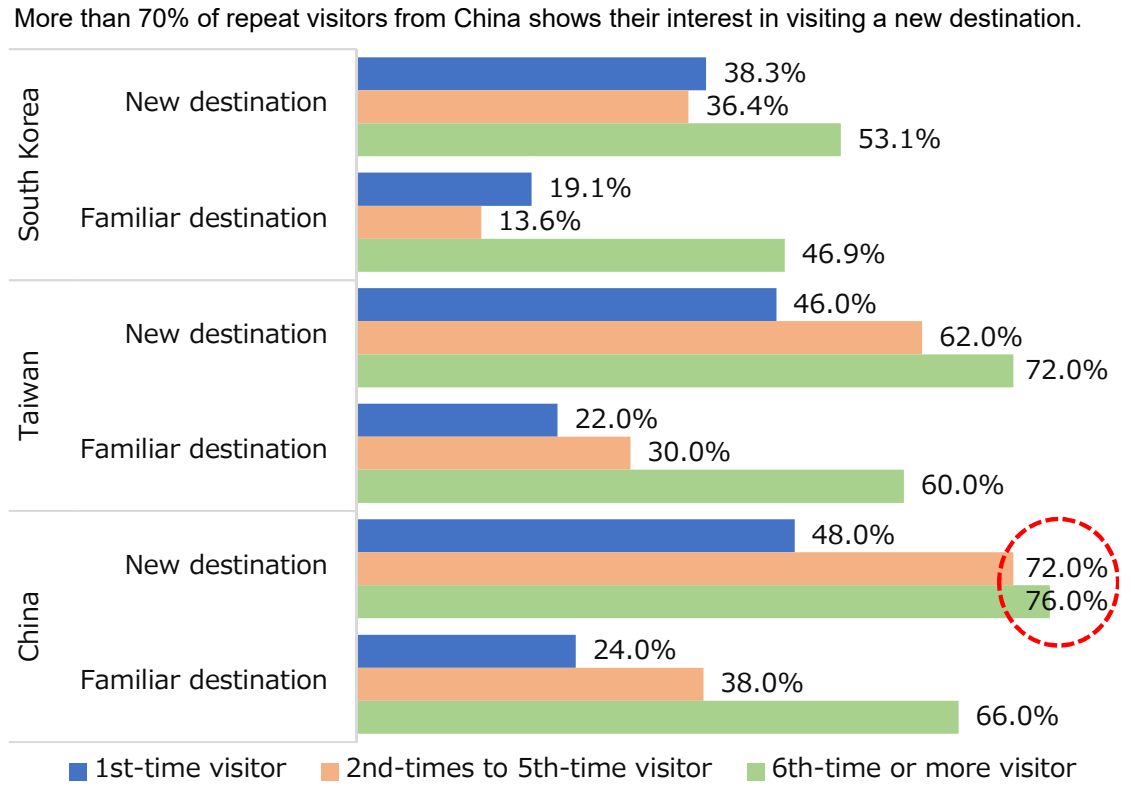
# Part II: Encouraging Repeat Visitors from East Asia to Visit Regional Areas (2)

- In general, repeat visitors tend to travel to regional areas. In particular, many repeat visitors from Taiwan travel across Japan. In contrast, destinations chosen by visitors from China are relatively limited, but those visitors show a keen interest in traveling to new destinations in regional areas.
- Many visitors begin to develop an interest in visiting Japan again while traveling in Japan. It is important to make visitors feel that Japan has more to offer during their travels.

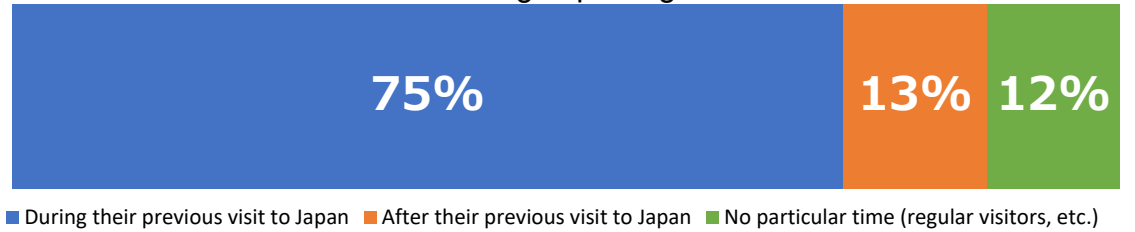
(Figure II-35) Destinations Chosen by Number of Visits



(Figure II-36) Comparison in Interest in Visiting New/Familiar Destinations



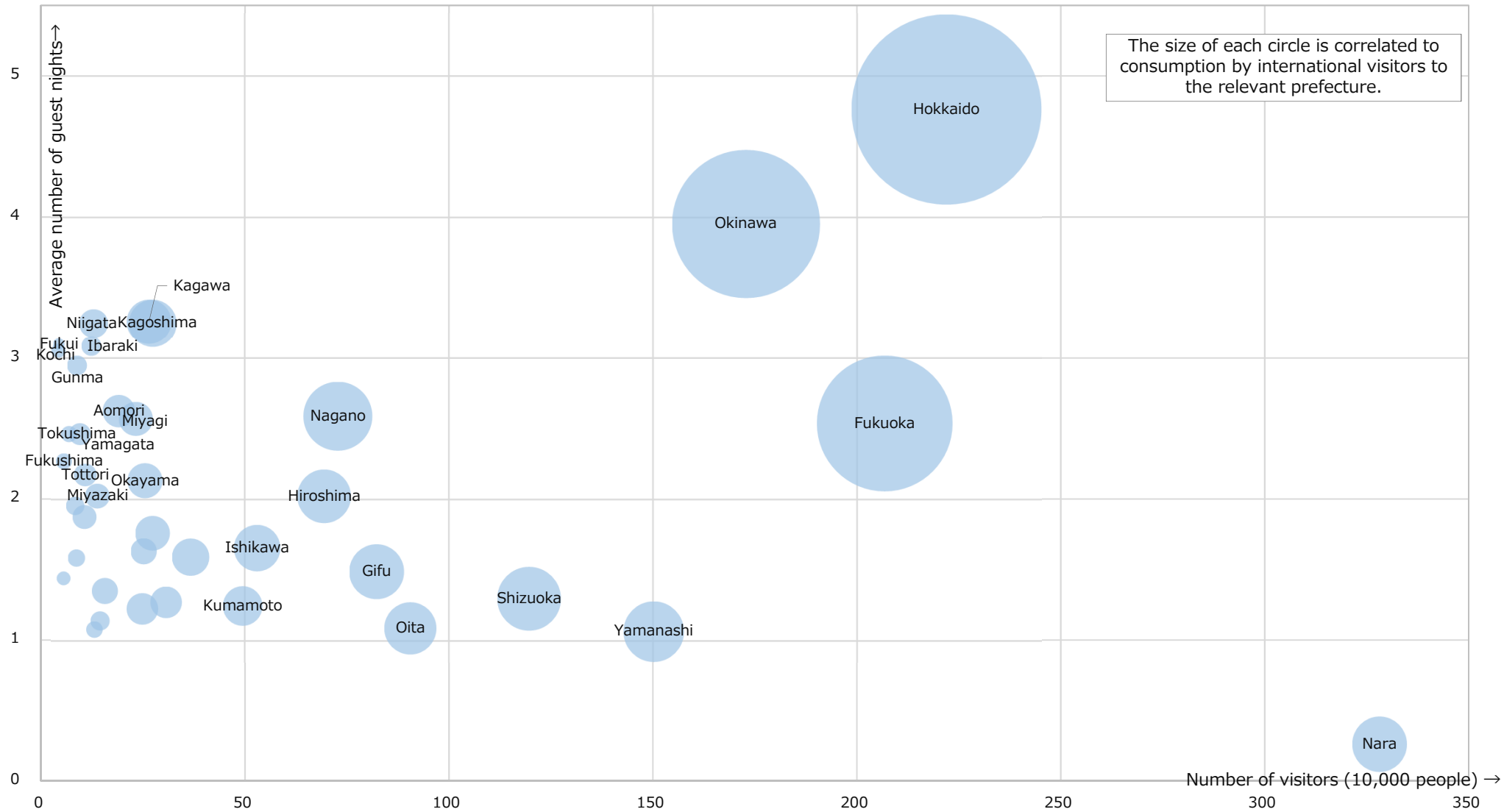
(Figure II-41) The Timing when International Visitors Became Interested in Visiting Japan Again



- The pattern of visit of international visitors to regional areas varies from prefecture to prefecture, as indicated by tourism consumption, the total number of international visitors and the average number of nights stayed.
- It is important for each prefecture to develop strategies to increase the number of international visitors and nights stayed by utilizing specific local characteristics.

(Figure II-51) Statistics of International Visitors to Regional Areas: Average Number of Nights Stayed; Total Number of Visitors; and Consumption

Hokkaido and Okinawa perform well in all three indicators. Nara boasts an outstanding number of visitors, which contributes to larger consumption within the prefecture. In Kagawa and Kagoshima, in comparison, the average number of nights stayed is relatively high, implying larger consumption within the prefectures.



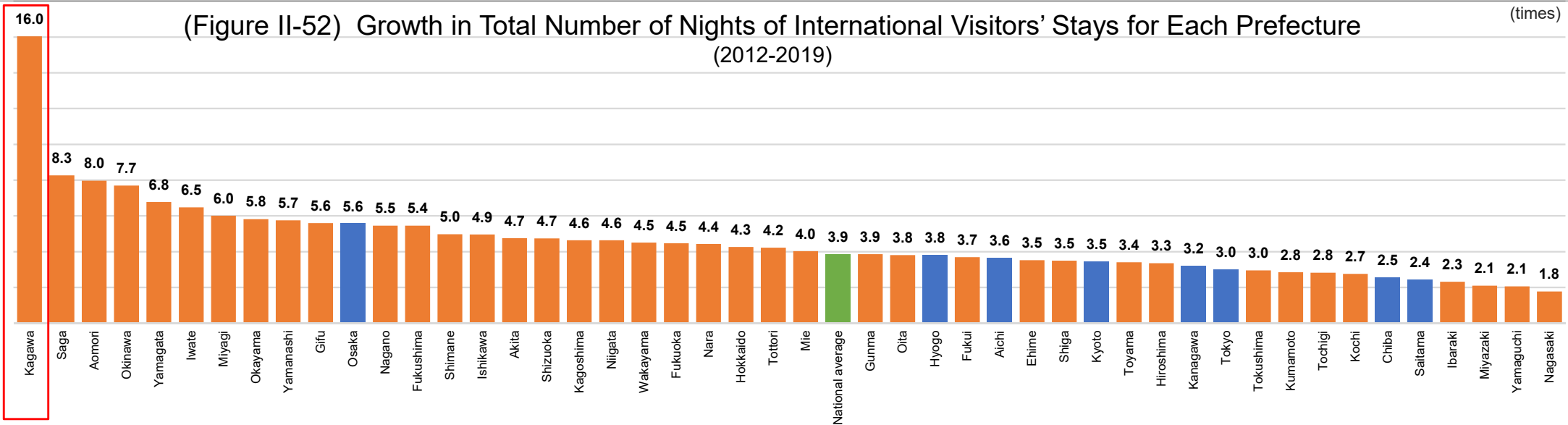
Note: "Regional areas" refers to prefectures excluding Saitama, Chiba, Tokyo, Kanagawa, Aichi, Kyoto, Osaka and Hyogo.

Source: International Visitor Survey 2019 (JTA)

## Part II: Attracting International Visitors to Regional Areas by Utilizing Local Characteristics (2)

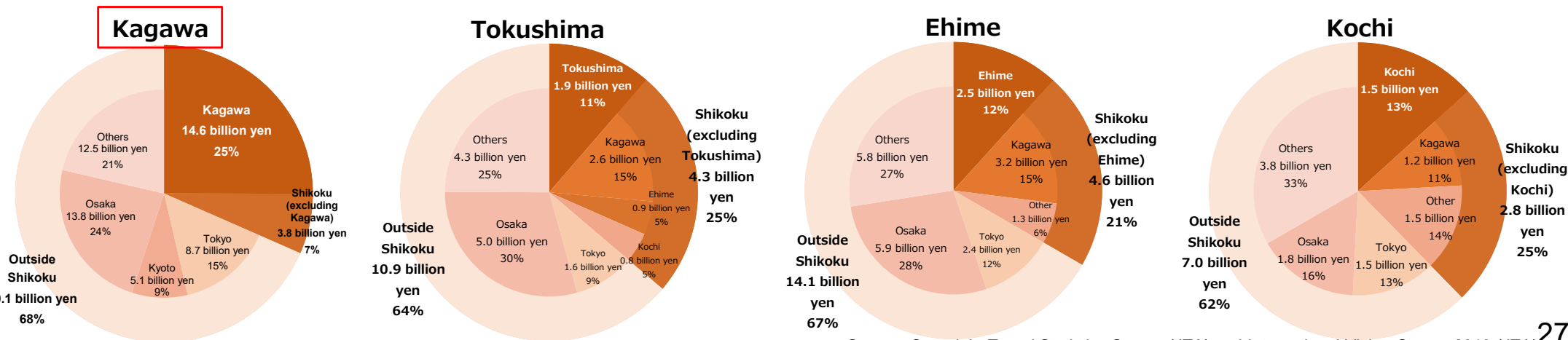
○ Kagawa ranks first in terms of the rate of the total number of guest nights of international visitors (16 fold, compared with 3.9 fold for national average, from 2012 to 2019). This is attributable to attractive tourism resources, such as unique art museums and scenic beauty, making Kagawa a popular choice as a main destination. Compared with other prefectures in the Shikoku region, consumption in Kagawa is notably large.

(Figure II-52) Growth in Total Number of Nights of International Visitors' Stays for Each Prefecture (2012-2019)



(Figure II-54) Tourism Consumption by International Visitors to Shikoku Prefectures

Visitors to Kagawa spent 14.6 billion yen within the prefecture, accounting for 25% of the total spending during their visit to Japan. This outstanding figure is attributable to the location's attractive tourism resources that encourage many visitors to plan longer stay. On the other hand, the other three prefectures in Shikoku, receive a smaller amount (and percentage) of spending in each prefecture: 1.9 billion yen (11% of total) in Tokushima, 2.5 billion yen (12%) in Ehime, and 1.5 billion yen (13%) in Kochi.

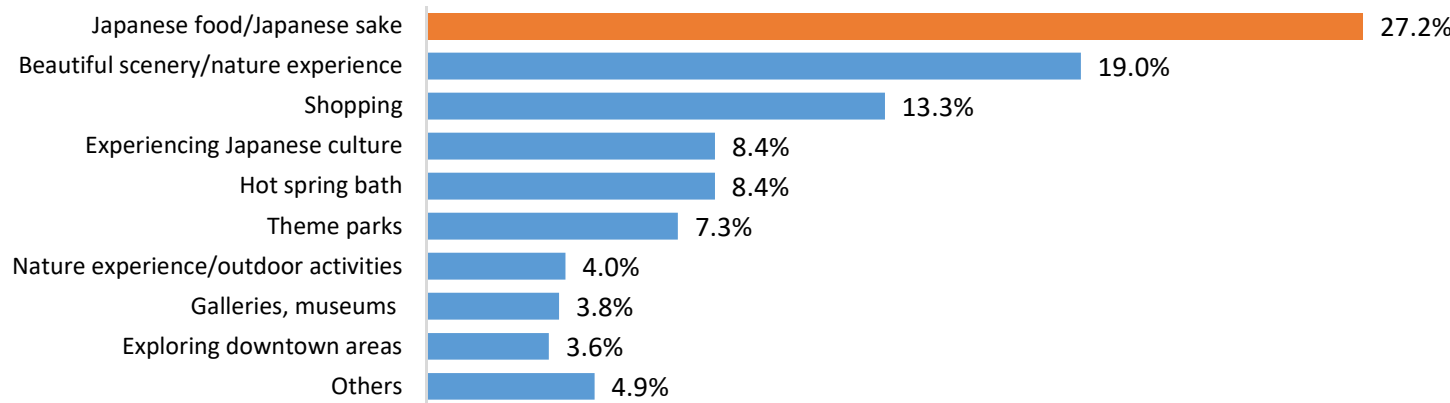


Source: Overnight Travel Statistics Survey (JTA) and International Visitor Survey 2019 (JTA)

# Part II: Popular Local Foods among International Visitors

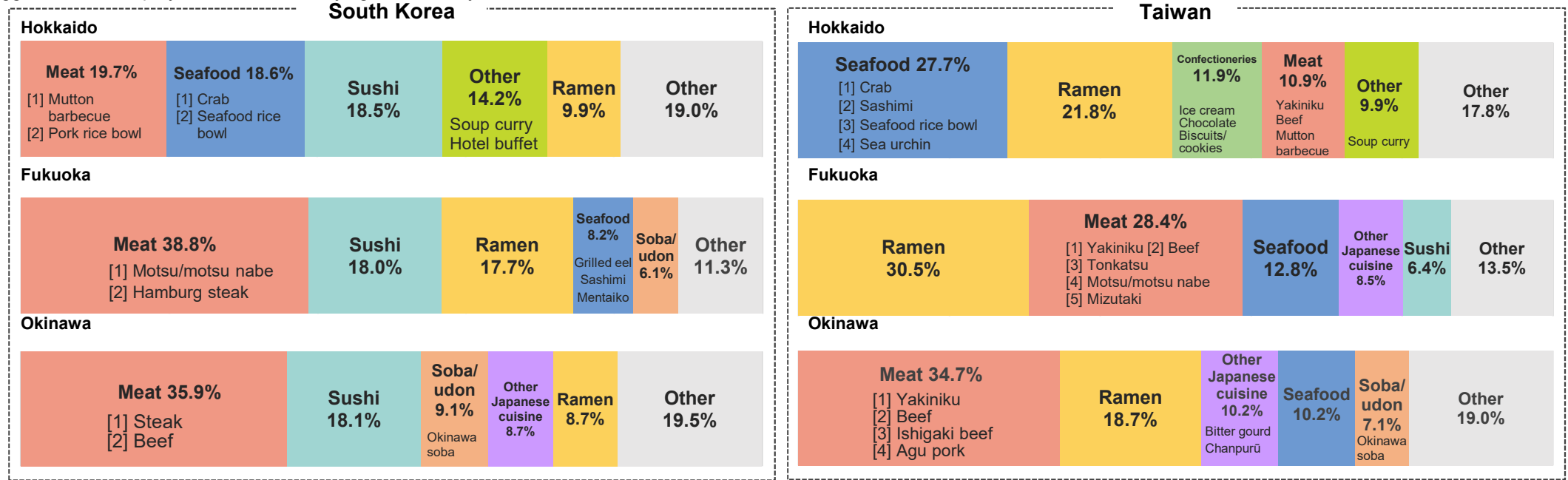
○ According to a survey of the most important leisure activity planned for the visit to Japan, the most common answer was “eating Japanese food,” chosen by 27.2% of the respondents. The survey showed that many visitors are satisfied with unique local food, which suggests that food has a potential to serve as a tourism resource.

(Column Figure II-7-1) Activity Planned by International Visitors before visiting Japan



(Column Figure II-7-5) Foods Most Enjoyed by International Visitors

Among South Korean visitors, various local specialty meat dishes are popular, such as mutton barbecue in Hokkaido, motsu (offal meat) dishes in Fukuoka, and steak in Okinawa. This suggests that food plays the role of conveying the diversity of local characteristics.

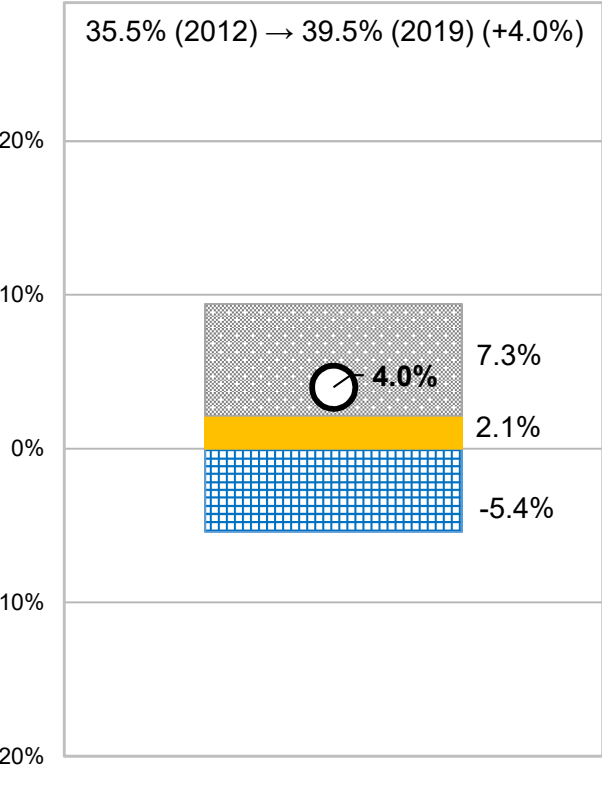


# Part II: Measures Taken by Ryokan which Succeeded in Raising Room Occupancy Rate by Attracting International Visitors

- The growing number of international visitors to Japan leads to higher room occupancy rates of ryokan, but such effect is smaller than that the case of types of accommodation.
- Among various measures taken by ryokan, particularly familiar options are facility renovation, employment of staff with foreign language skills, etc., which have proven effective in 80% of ryokan that have introduced these measures, though the rate of implementation is lower than that of multilingual services and improved communication environment, experienced the increase of room occupancy rates.

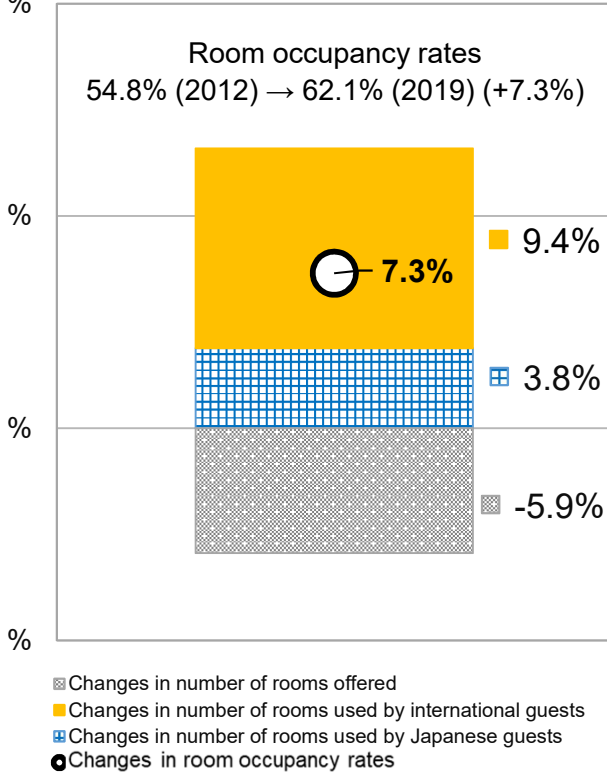
(Figure II-60/61) Analysis of Changes in Room Occupancy Rates  
(Changes between 2012 and 2019)

## Ryokan



## All Accommodation Types

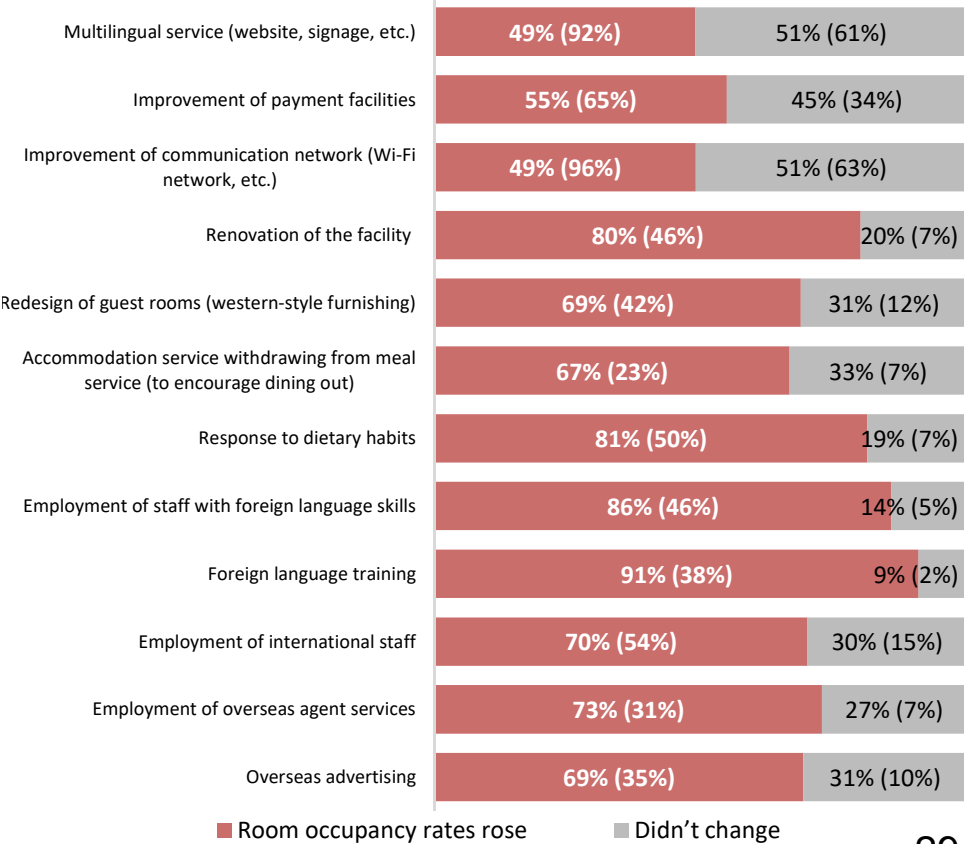
(Ryokan, hotels, etc.)



(Figure II-64)  
Effect of Growing Number of Inbound Visitors on  
Ryokan's Room Occupancy Rates



(Figure II-65) Impact of Measures on Room Occupancy Rates  
Figures in parentheses indicate an introduction rate.



Note 1. Room occupancy rates = Number of rooms used / Total number of rooms offered; Total number of rooms offered = Number of rooms used / Room occupancy rates

Note 2. Please note that the number of rooms used is divided into Japanese and international guests simply in proportion to the percentage of the total number of guest nights for the two groups, which inevitably involves substantial statistical tolerance.

Note 3. It should be noted that an increase/decrease in the number of rooms offered can lower/raise room occupancy rates.

Note 4. Preliminary figures for 2019.



# Part III: Measures Taken in FY2019

## **1. Environmental Development to Introduce Infrastructure that Makes Foreigners' Stays Truly Enjoyable**

- Speedy development of multilingual service and Wi-Fi environment, etc.  
(Tourist destinations, local railways, cultural assets and national parks and farm stays)
- Improvement of MaaS and access of transportation to tourists destinations (buses, taxis, rental cars, etc.)
- Improvement of productivity to raise the profitability of Ryokan and hotels, as well as the employment of international staff, etc.
- Effective implementation of “Emergency plan to ensure the safety and security of international visitors to Japan” (September 2019), etc.

## **2. Development of New Regional Tourism Content**

- Holding “Japan Cultural Expo” across the country, exhibiting and utilizing national treasures and important cultural properties
- Setting up comfortable facilities in national and enhancement of nature experience programs
- Extending opening hours of public facilities and utilization of private-sector services
- Drastic expansion of exhibition spaces in Sannomaru Shozokan (Museum of the Imperial Collections)
- Redesigning the Tokyo National Museum and applying the result effect to other museums; expanding the exhibition of state-owned cultural properties in local museums in regions related to the properties
- Development of Japanese traditional house and farmhouse establishment to offer appropriate farm stay experiences; enhancement of farming experience programs
- Development of living history programs (that incorporate historical items, activities and information related to specific cultural properties)
- Castle stay, temple stay, glamping (deregulation, applying successful approaches to other locations)
- Revitalization of snow resort areas and Ryokan

## **2. Development of New Regional Tourism Content (continued)**

- Development of travel experience programs for cruise passengers to increase passenger satisfaction, and plans to refer cruise passengers to local commercial districts
- Nighttime leisure (nighttime events, nighttime transportation, etc.)
- Promotion of trains designated for tourism and train that allows cyclists to bring with their bikes
- Promotion of medical tourism, etc.

## **3. Appropriate Role Sharing and Strengthening of Cooperation between the Japan National Tourism Organization and Regional Organizations (Local Governments and Destination Management/Marketing Organizations\*)**

- Clarifying the roles of local governments and destination management/marketing organizations (DMOs)
- Enhancement of systems for JNTO to serve as a center to disseminate tourist information and attractions of each region across the country to the world
- Enhancement of digital marketing systems of JNTO to provide research results to relevant districts
- Focus of global campaigns from Europe/USA/Australia to East Asia (China, South Korea, etc.)
- Development of new markets (the Middle East, Central and South America) to attract tourists from broader areas

\*DMO: Destination Management/Marketing Organization

## **4. Facilitation of Immigration Procedures, etc.**

- Introduction of face authentication systems to accelerate immigration procedures
- Strategic relaxation of visa regulations; expansion of duty-free shop
- Increasing the number of flight departure/arrival slots (40,000 slots each in Haneda and Narita); completion of Naha Airport's second runway; increasing direct international flights to/from regional airports
- Measures against over tourism

# Part IV: Measures to be Taken in FY2020

## ◆Countermeasures against COVID-19 in the Field of Tourism

- Due to the impact of the COVID-19 outbreak, the number of international visitors from around the world has significantly decreased. Domestic tourism demand has also plunged as a result of consumers staying home as requested by the government, refraining from booking, cancelation of booked trips, etc. This has severely affected a number of related industries, not only travel services, accommodation services, but also regional transportation services, restaurants and merchandisers in regional areas.
- In order to address this situation and achieve a future recovery of the tourism industry, support measures will be implemented with a focus on the following three areas: 1.) prevent the spread of infection and put an end to the outbreak as soon as possible; 2.) providing support to maintain employment and continue business running and develop infrastructure to prepare for a post-crisis turnaround; and 3.) execute a strong domestic demand stimulus package when the crisis has settled down.
- The condition of recovery from the crisis will be carefully assessed for each country/region. Activities to attract tourists will be resumed from where possible to recover inbound tourism demand, thus getting the industry back on track and realize the Tourism-oriented Country vision—initiative to revitalize local economy centering on tourism throughout the country.

- A help desk will be installed in each district transport bureau to receive requests from local tourism-related business operators and provide tailored responses.

○ Support to maintain employment and continue business	<ul style="list-style-type: none"> <li>○ Subsidy program for sustaining businesses</li> <li>○ Raising payment limits for Employment Adjustment Subsidies; providing video instructions on application procedures, etc.</li> <li>○ Financing support through expanding the framework for effectively interest-free and unsecured loans, and providing safety net guarantees, etc.</li> <li>○ Deferral and reduction of fixed asset tax and other taxes and public dues</li> <li>○ Postponed payment and reduction of NHK fees</li> </ul>
○ Infrastructure development to prepare for a turnaround	<ul style="list-style-type: none"> <li>○ Development of environment to ensure tourists' safety , including supports to formulate appropriate guidelines in tourism industries</li> <li>○ Dispatching advisors to accommodation facilities to help with applications for subsidy programs, formulation of renovation plans, etc. as well as dispatching licensed guide interpreters to provide language training to employees, etc.</li> <li>○ Introducing preventive measures against COVID-19 to tourist facilities and improving tourist destinations and related transportation services to accept international visitors</li> <li>○ Improvement of local tourism resources</li> </ul>
○ Stimulating demand for Japanese domestic travel	<ul style="list-style-type: none"> <li>○ “Go To Travel” Campaign that offers the following benefits:               <ul style="list-style-type: none"> <li>• Discount on one-day trip plans in addition to overnight trips.</li> <li>• Issue discount coupons that embrace a wide range of retailers from souvenir shops, restaurants, tourist facilities to transportation and other services in regional areas</li> </ul> </li> <li>○ Consideration of new styles of tourism in line with the New Lifestyle concept beyond COVID-19</li> </ul>
○ Recovery of inbound travel	<ul style="list-style-type: none"> <li>○ Joint advertising by JNTO and airline companies, etc.</li> <li>○ International promotion of Japan's tourist destinations and attractions by JNTO, utilizing media advertising and other videos and employing popular influencers</li> </ul>

## ◆Strategies beyond COVID-19

Aiming to realize the tourism-oriented country vision, improvement of the environment to accept international visitors and enhancement of local tourism resources will be implemented in FY2020.