

White Paper on Tourism in Japan, 2019 (Summary)

Japan Tourism Agency
June 2019

The 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. It consists of the following four parts.

Part I Tourism Trends in 2018

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

Part II (Theme Chapter) Economic Effects of Tourism Expanding across Japan

- Chapter 1 Impact of Increase in International Visitors to Japan on the Japanese Economy
- Chapter 2 Impact of Increase in International Visitors to Japan on Tourist Destinations
- Chapter 3 Impact of Natural Disasters on Travel

Part III Measures Taken in FY 2018

- Chapter 1 Enhance the Attractiveness of Tourism Resources to be the Foundation for "Regional Revitalization"
- Chapter 2 Innovate the Tourism Industry to Enhance International Competitiveness and to Become Japan's Core Industry
- Chapter 3 Create an Environment Where All Travelers can Enjoy Sightseeing Comfortably Without Stress

Part IV Measures to be Taken in FY 2019

- Chapter 1 Environmental Development for Setting Specifications that Foreigners can Truly Enjoy
- Chapter 2 Development of New Regional Tourism Contents
- Chapter 3 Appropriate Role Sharing and Strengthening Cooperation between the Japan National Tourism Organization and Regional Organizations (Local Governments and Destination Management/Marketing Organization)
- Chapter 4 Other Measures Contributing to Increase in Consumption and Visitors in Outlying Areas

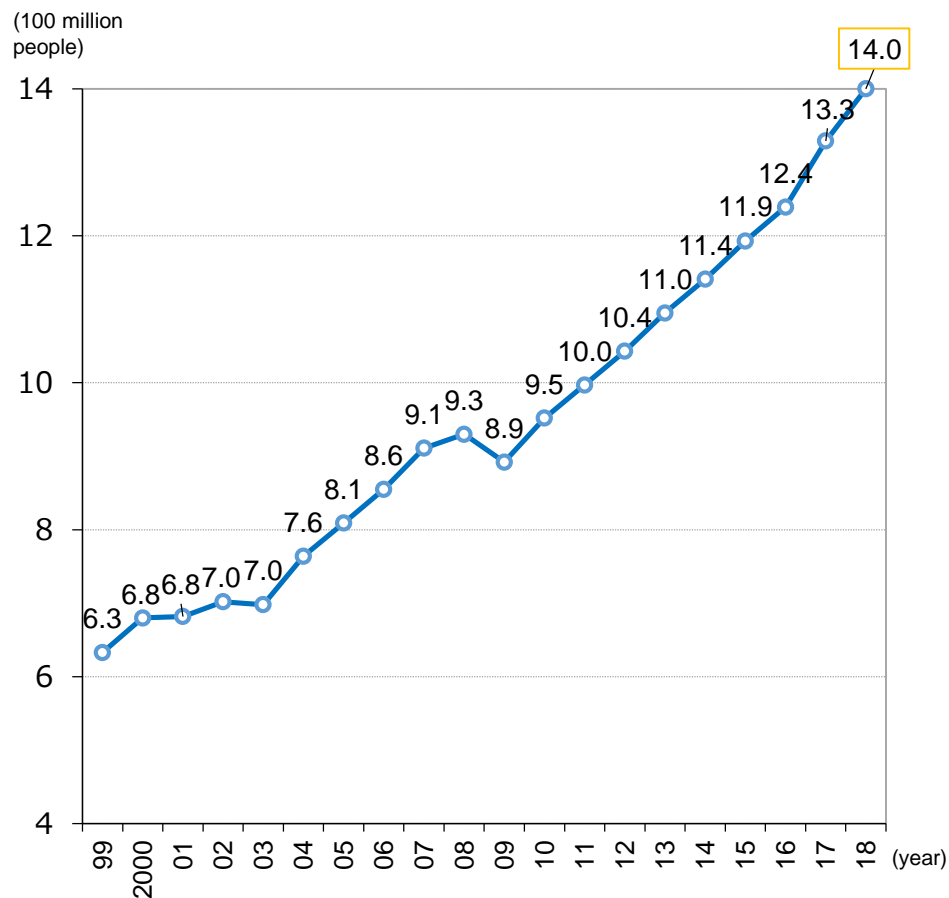
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Travel and Domestic Trips) 8
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[Part I] Global Tourism Trends in 2018

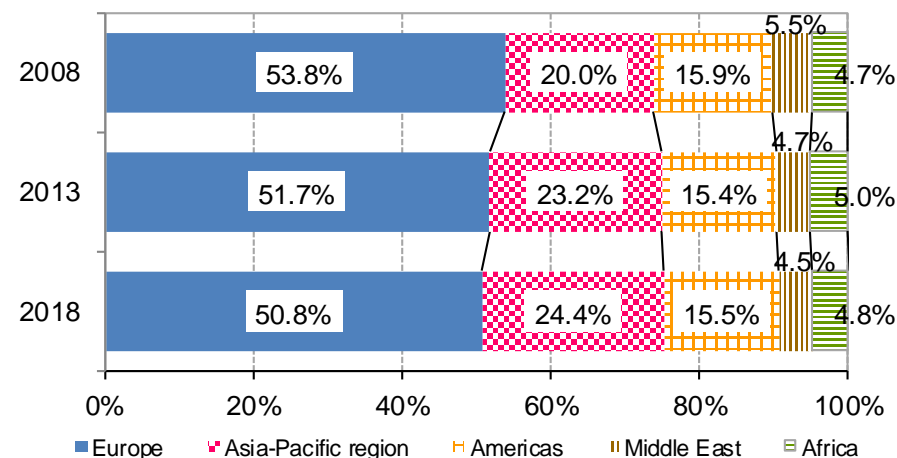
- According to the global tourism trends announced by the United Nations World Tourism Organization (UNWTO), the number of international tourists in 2018 increased by 74 million from the previous year to **1,430 million (up 5.6% from the previous year)**.
- By region, the Asia-Pacific region has increased its share in both arrivals and departures in recent years.

(Figure I-2) The Number of International Tourists

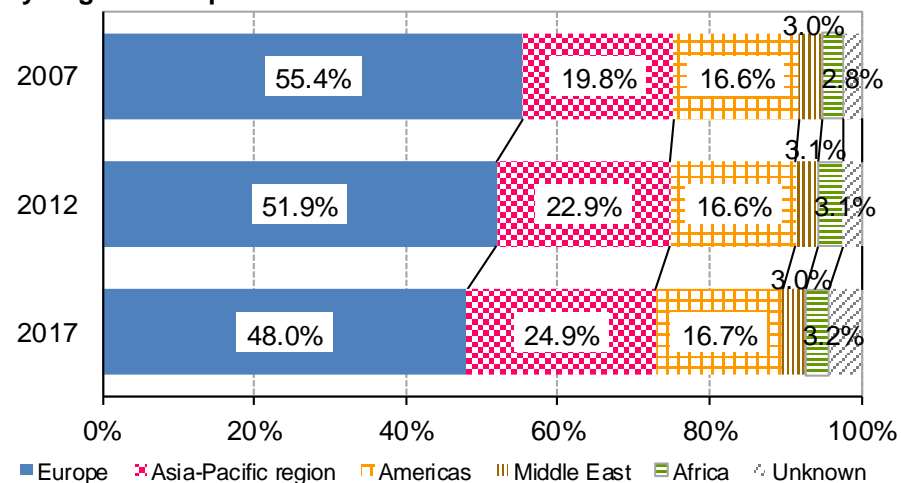


(Figure I-5) The Number of International Tourists by Region of Origin

<By Region of Arrival>



<By Region of Departure>

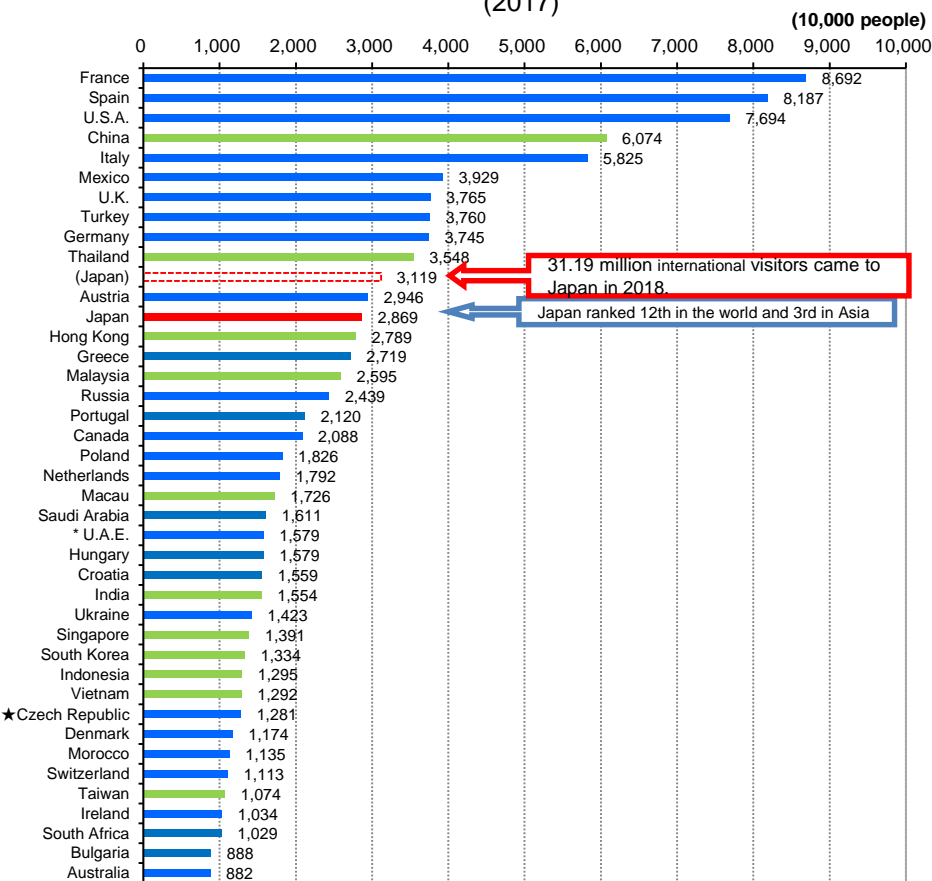


Source: Japan Tourism Agency (JTA) document based on data of the UNWTO

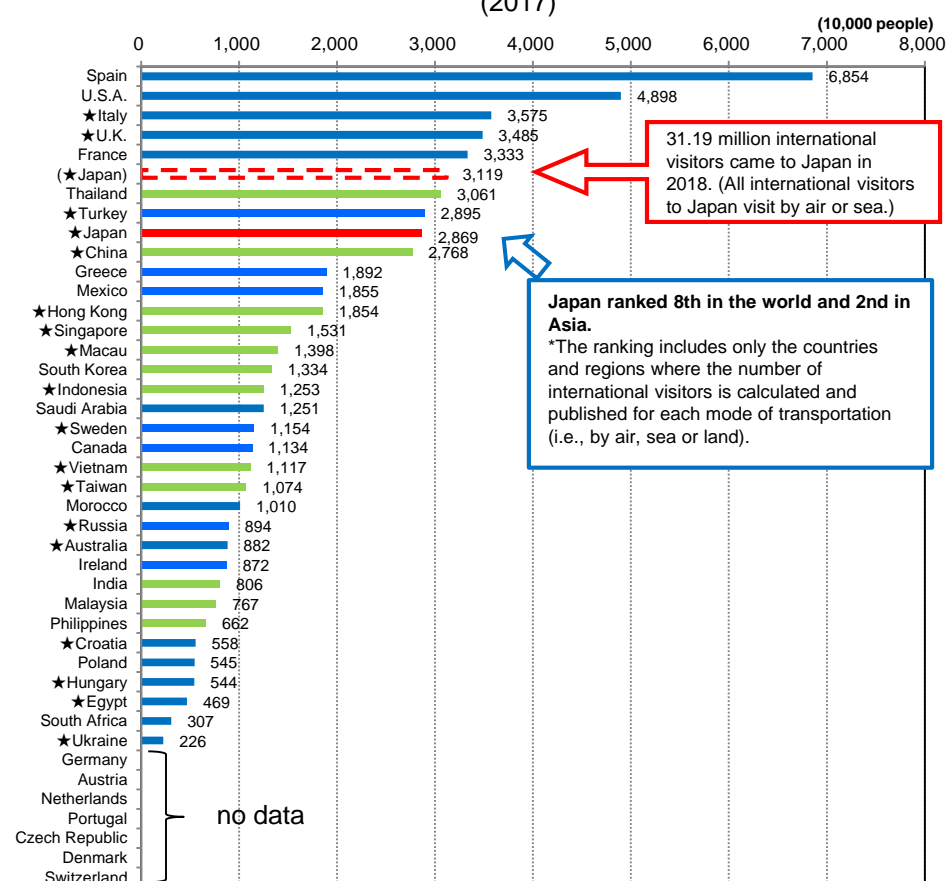
[Part I] Global Tourism Trends in 2018

- In the "Ranking of the Number of International Visitors by Country/Region" in 2017, Japan ranked **12th**, up from 16th in the previous year, with 28.69 million. Japan ranked 3rd in Asia, overtaking Hong Kong and Malaysia.
- In the "Ranking of the Number of International Visitors by Air or Sea," Japan ranked **8th (2nd in Asia)** with 28.69 million.
- The number of international visitors to Japan in 2018 (31.19 million) was equivalent to **11th** in the "Ranking of the Number of International Visitors by Country/Region" and **6th** in the "Ranking of the Number of International Visitors by Air or Sea" in 2017.

(Figure I-6) Ranking of the Number of International Visitors by Country/Region (2017)



(Figure I-7) Ranking of the Number of International Visitors by Air or Sea (2017)



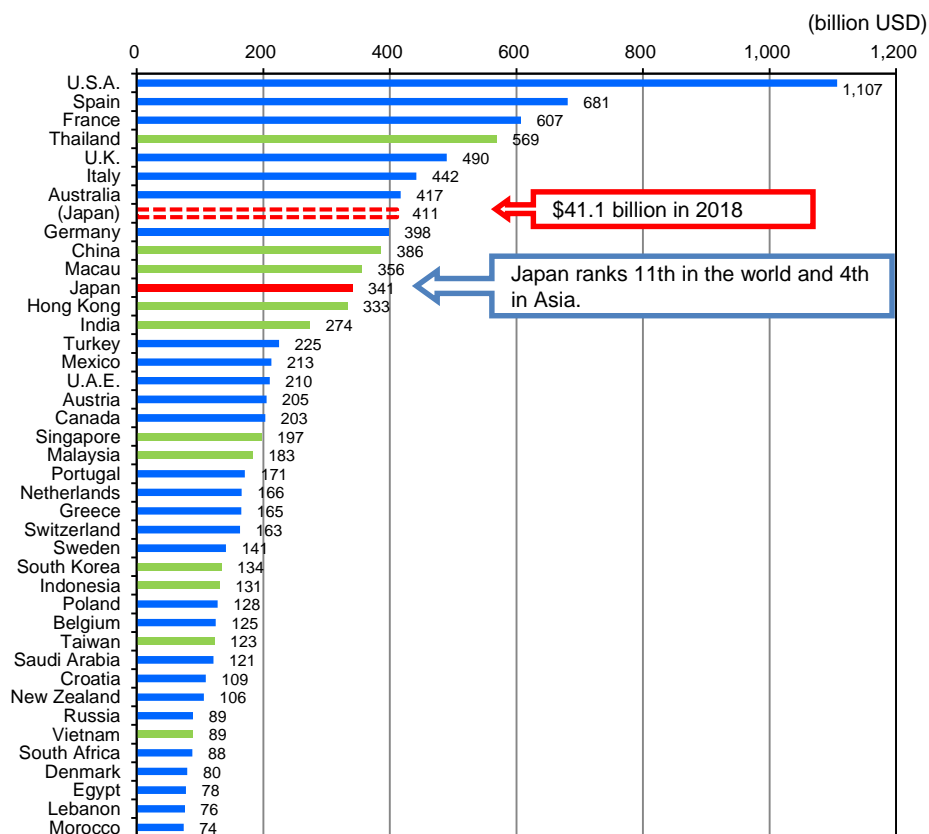
Source: JNTO document based on data of the UNWTO.
 Note 1:Figures shown above are provisional as of May 2019.
 Note 2:In countries marked with ★, figures for 2017 are unannounced. Therefore, we used figures for 2016.
 Note 3:Figures for the United Arab Emirates are for Dubai only and are based on data collected through September 2018.
 Note 4:Except for Japan, Russia, South Korea, Vietnam, Taiwan, and Australia, the number of international visitors means the number of international visitors who had at least an overnight stay in the country/region they visited.
 Note 5:Rankings are subject to change depending on the timing of data collection, because data may be updated or modified from time to time.
 Note 6:The number of international visitors is calculated and published according to different statistical criteria for each country and region, so careful comparison is required.
 (For example, the number of foreign crew members is not included in Japanese statistics, but it is included in the statistics of France, Spain, China, South Korea, etc.)

Source: Japan National Tourism Organization (JNTO) document based on data of the UNWTO.
 Note 1:The number of international visitors is calculated and published by different statistical criteria for each country and region. Therefore, it is necessary to note the difference of the statistical criteria of each country when strictly comparing.
 Note 2:Figures shown above are provisional as of January 2019.
 Note 3:Except for the countries/regions marked with ★, the number of international visitors means the number of international visitors who had at least an overnight stay in the country/region they visited.
 Note 4:Green in the graph indicates a country/region belonging to Asia.
 Note 5:In countries and regions where figures for 2017 are unannounced or unknown, we used figures for the latest year for which the statistics are available.
 Note 6:The figures adopted in the graph are the number of international visitors traveling by air and sea, and exclude those traveling by land (by car, etc.).
 Note 7:The number of international visitors by air or sea is unknown for Germany, Austria, the Netherlands, Portugal, Czechia, Denmark, and Switzerland because data on the means of transportation used by international visitors are unavailable.
 Note 8:Rankings are subject to change depending on the timing of data collection, because data may be updated or modified from time to time.

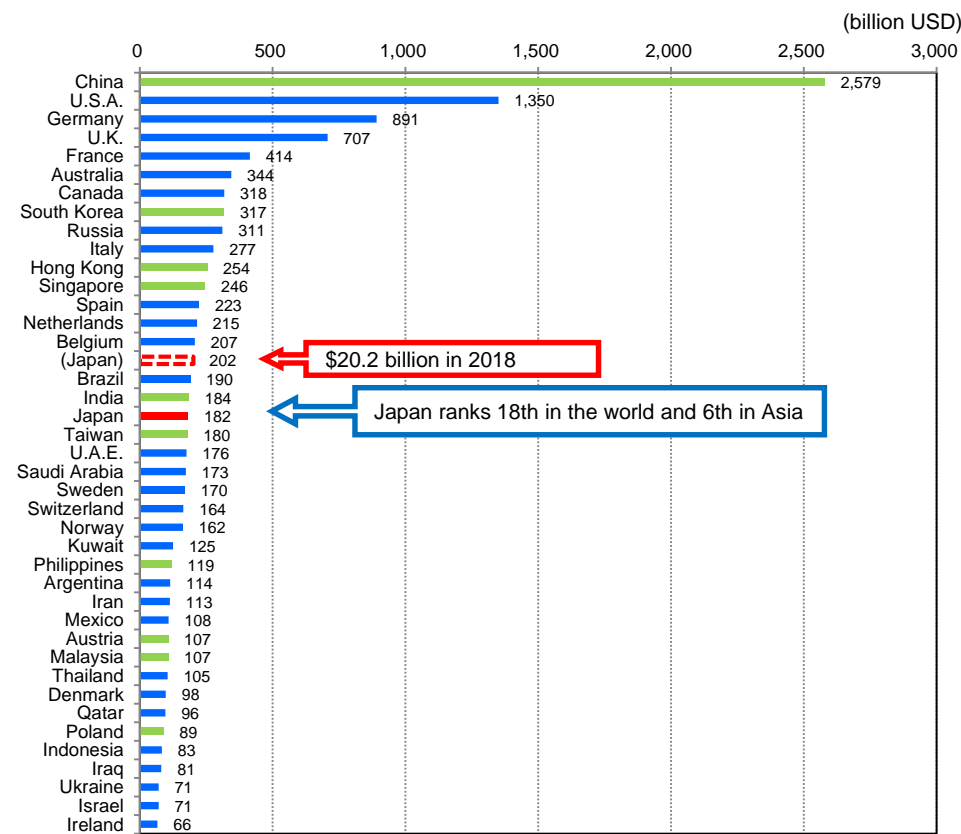
[Part I] Global Tourism Trends in 2018

- In the "Ranking of International Tourism Receipts by Country/Region" in 2017, Japan was placed the same rank as the previous year (**11th (4th in Asia)**) although the amount of receipts increased to \$34.1 billion.
- In the "Ranking of International Tourism Expenditures by Country/Region," Japan ranked **18th (6th in Asia)**, down from 16th (5th in Asia) in the previous year, with \$18.2 billion.
- The amount of international tourism receipts of Japan in 2018 (\$41.1 billion) was equivalent to **8th** in the "Ranking of International Tourism Receipts by Country/Region" in 2017. The amount of international tourism expenditures of Japan in 2018 (\$20.1 billion) was equivalent to 16th in the "Ranking of International Tourism Expenditures by Country/Region" in 2017.

(Figure I-8) Ranking of International Tourism Receipts by Country/Region (2017)



(Figure I-9) Ranking of International Tourism Expenditures by Country/Region (2017)



Source: JNTO document based on data of the UNWTO and national tourism offices from each country.

Note 1: Figures shown above are provisional as of January 2019.

Note 2: International tourism receipts don't include international passenger fares.

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

Calculated values of international tourism receipts are affected by changes in the exchange rates of foreign currencies to the U.S. dollar.

Thus, rankings are subject to change depending on the timing of data collection.

Source: JNTO document based on data of the UNWTO and national tourism offices from each country.

Note 1: Figures shown above are provisional as of January 2019.

Note 2: International tourism expenditures don't include international passenger fares.

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

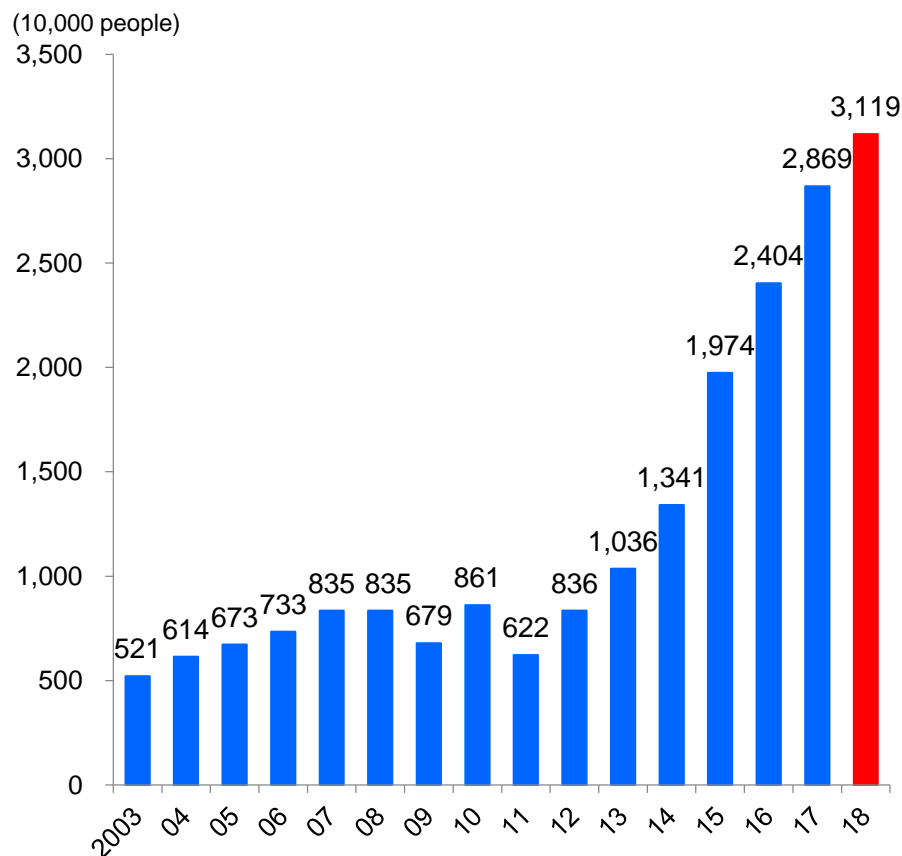
Calculated values of international tourism expenditures are affected by changes in the exchange rates of foreign currencies to the U.S. dollar.

Thus, rankings are subject to change depending on the timing of data collection.

[Part I] Tourism Trends in Japan in 2018 (Situation of Travel to Japan)

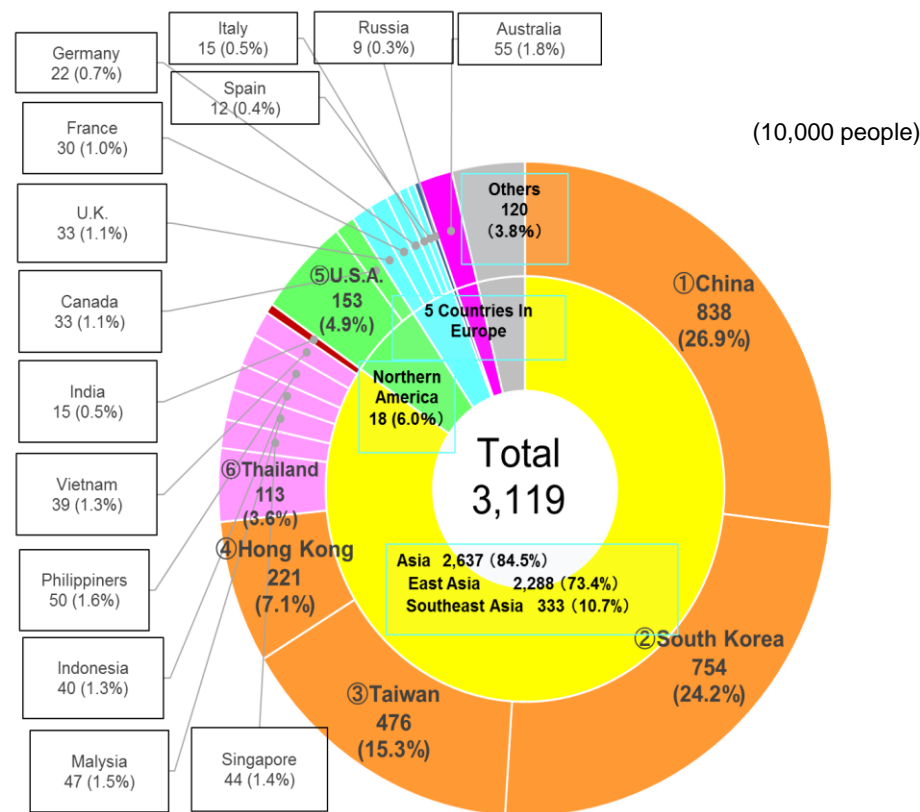
- The number of international visitors to Japan in 2018 was **31.19 million (up 8.7% from the previous year)**.
- The number of international visitors to Japan from Asia reached 26.37 million (84.5% of the total). The number of international visitors to Japan from East Asia reached 22.88 million (73.4% of the total), including 3.33 million (10.7% of the total) from 6 major ASEAN countries. The number of international visitors to Japan from North America was 1.86 million. The number of international visitors to Japan from 5 major European countries (UK, France, Germany, Italy, and Spain) was 1.12 million.

(Figure I-10) The Number of International Visitors



Source: JTA document based on data of the JNTO.

(Figure I-11) Breakdown of the Number of International Visitors(2018)



Source: JTA document based on data of the JNTO.

Note 1: Values in parentheses indicate share as a percent of all international visitors to Japan.

Note 2: "Others" is Asian, European, or other countries/regions not otherwise shown in the pie chart.

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

- The tourism consumption by international visitors in 2018 reached a record high of **4.5189 trillion yen**. It has increased for the seventh consecutive year since 2012 (1.1 trillion yen).
- By nationality and region, China ranked first at 1.545 trillion yen and accounted for 34.2% of the total amount, followed by South Korea at 588.1 billion yen (13.0%), Taiwan at 581.7 billion yen (12.9%), Hong Kong at 335.8 billion yen (7.4%), and the United States at 289.3 billion yen (6.4%). The tourism consumption by international visitors from the countries and regions above accounted for 73.9% of the total.

(Figure I-13) Changes in Tourism Consumption by International Visitors

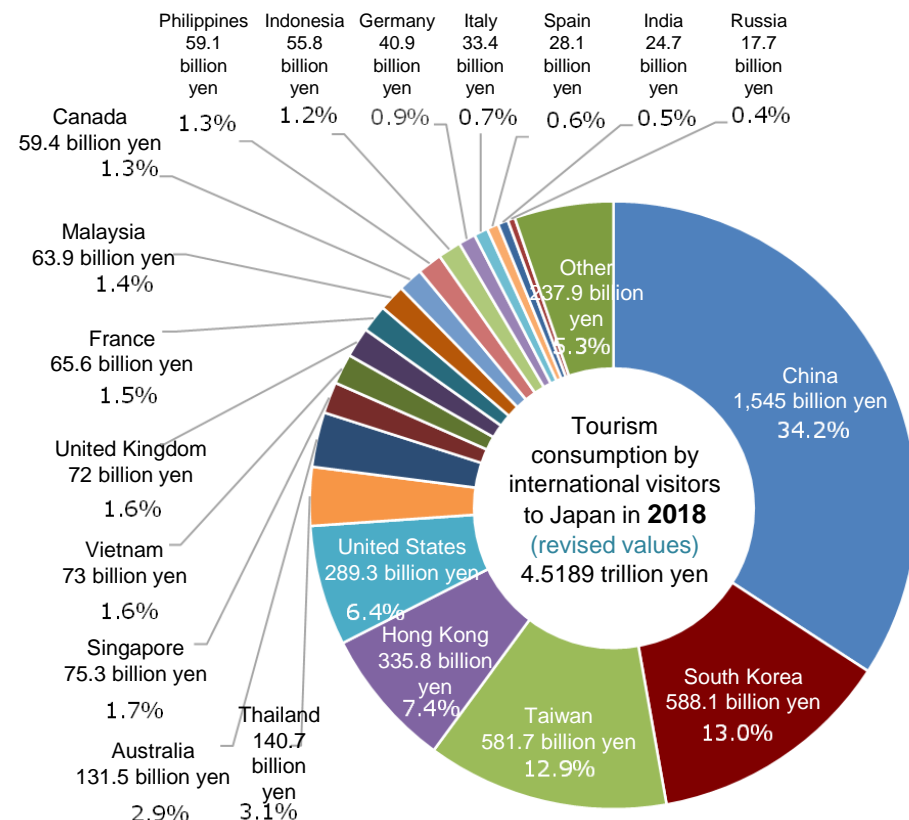
year	Tourism consumption by international visitors
2012	1.0846 trillion yen
2013	1.4167 trillion yen
2014	2.0278 trillion yen
2015	3.4771 trillion yen
2016	3.7476 trillion yen
2017	4.4162 trillion yen
2018	4.5189 trillion yen

Source: International Visitor Survey (JTA)

Note 1: In the past, the survey focused mainly on passengers using airports, but in light of the rapid increase in the number of cruise passengers, who tend to stay for a short period of time, the survey has been conducted for these passengers as well since 2018. Their answers were included in the survey results. The tourism consumption in 2018 estimated by the conventional estimation method is 4.8 trillion yen.

Note 2: The percentages are the percentage to the total tourism consumption by international visitors.

(Figure I-14) Tourism Consumption by International Visitors Broken Down by Country/Region



[Part I] Tourism Trends in Japan in 2018 (Situation of Japanese Overseas Travel and Domestic Trips)

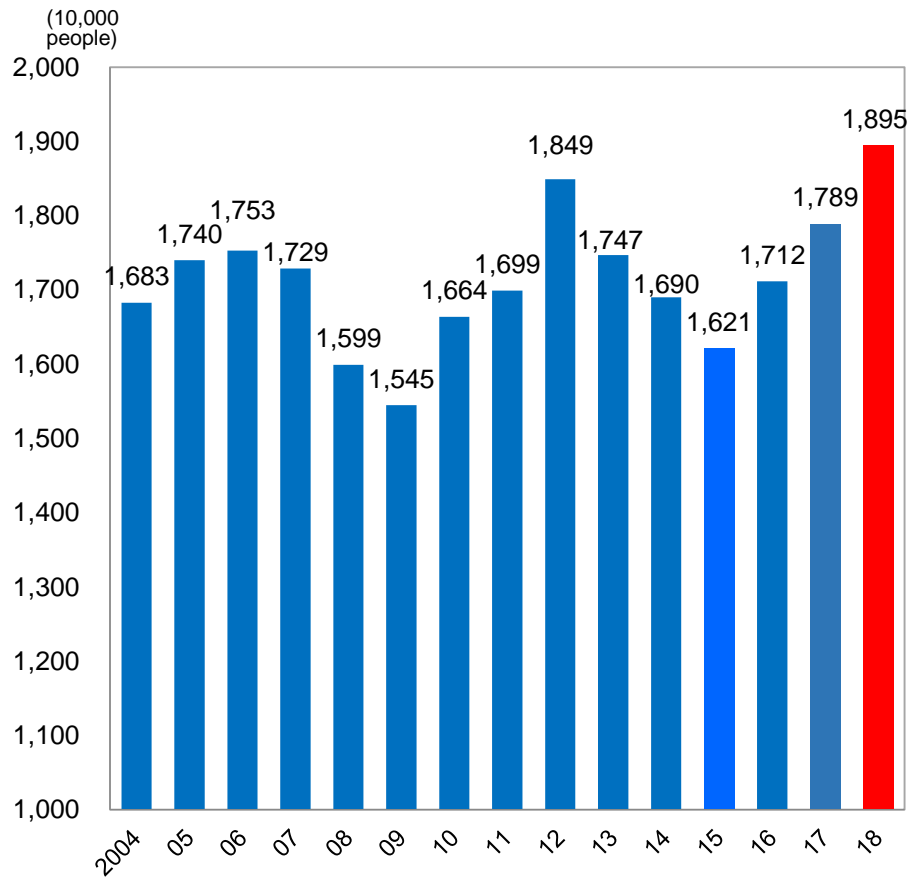
(Japanese Overseas Travel)

○ In 2018, the number of Japanese overseas travelers increased for the third consecutive year, to 18.95 million (up 6.0% from the previous year).

(Domestic Trips)

○ In 2018, the number of Japanese nationals who took overnight trips was 291.05 million, and the number of Japanese nationals who took domestic one-day trips was 270.73 million.

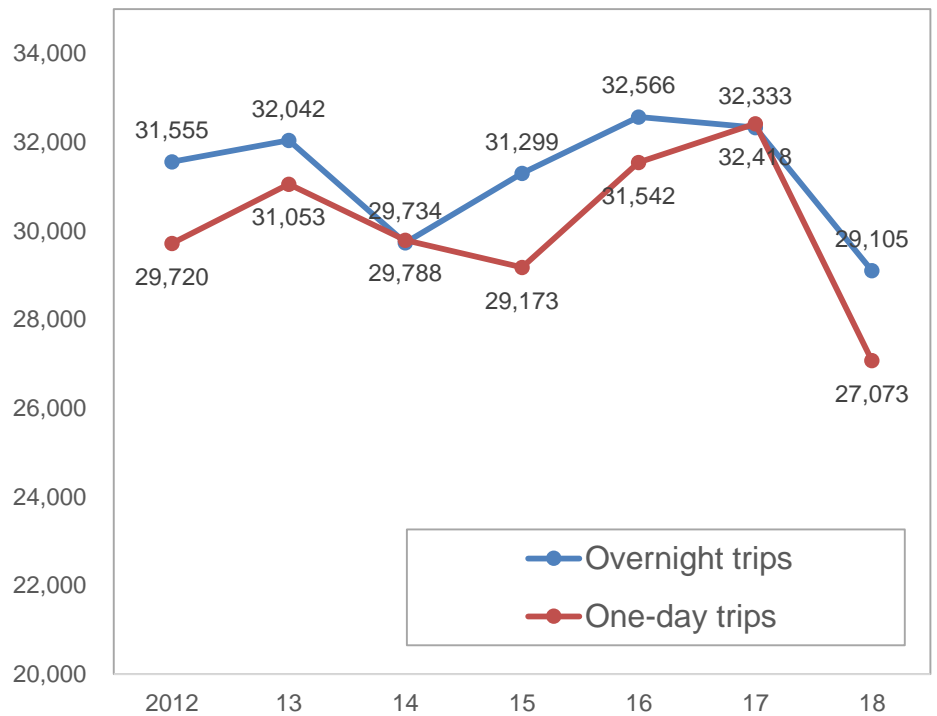
(Chart I-25) The Number of Japanese Overseas Travelers



Source: JTA document based on data of the JNTO.

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

(10,000 people)

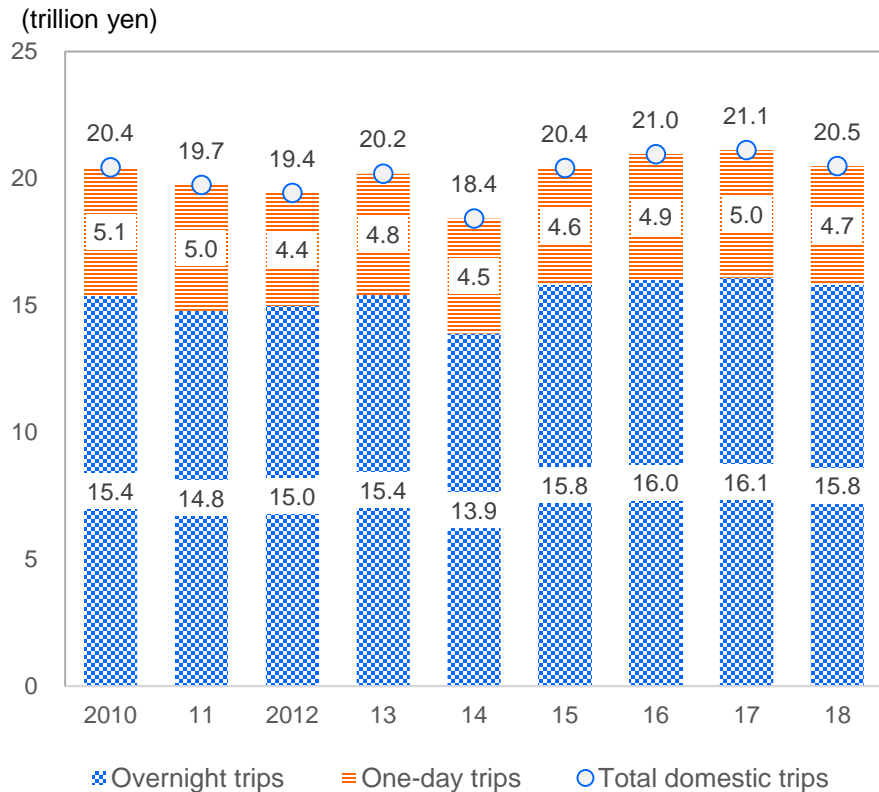


Source: National Tourism Survey (JTA)

[Part I] Tourism Trends in Japan in 2018 (Situation of Japanese Overseas Travel and Domestic Trips)

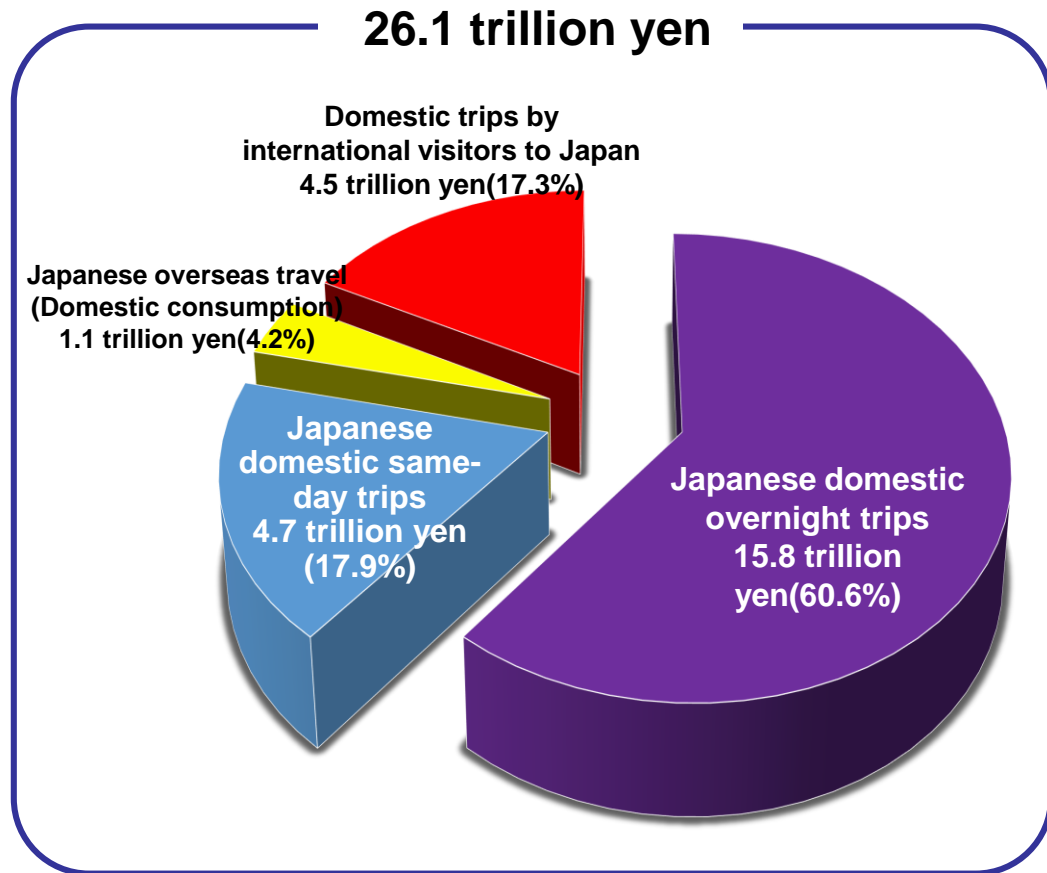
- In 2018, Japanese domestic tourism consumption was **20.5 trillion yen (down 3.0% from the previous year)**.
- In 2018, domestic tourism consumption by Japanese and international visitors was **26.1 trillion yen**.
- Within that, domestic tourism consumption by international visitors accounted for **17.3%**.

(Figure I-30) Japanese Domestic Tourism Consumption



Source: National Tourism Survey (JTA)

(Figure I-31) Domestic Tourism Consumption in Japan

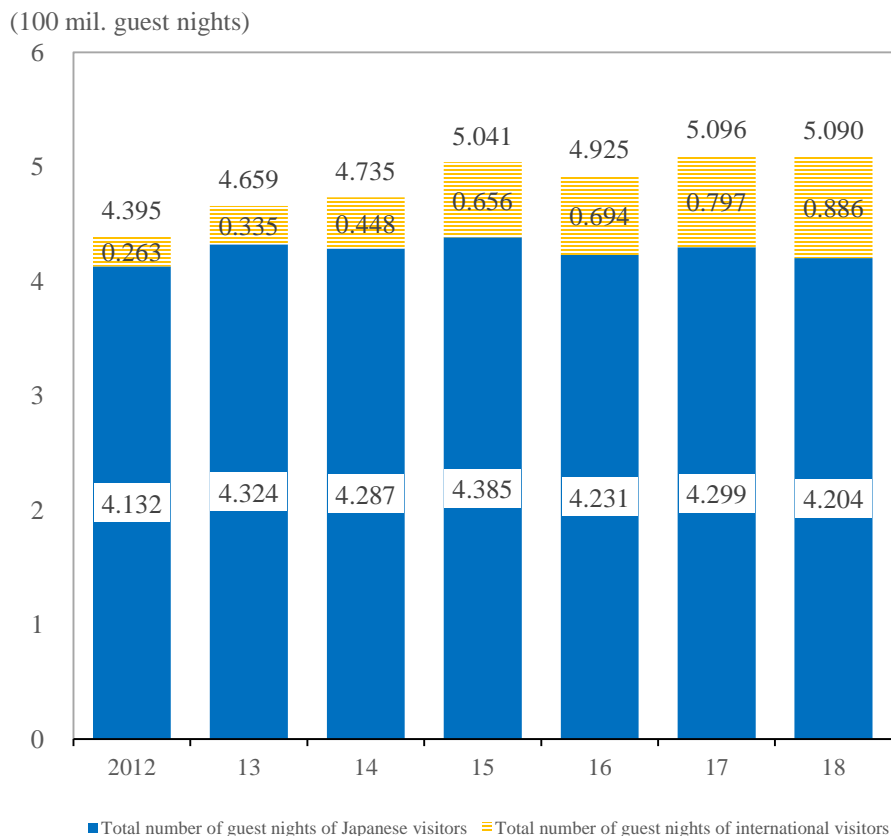


Sources: National Tourism Survey (JTA) and International Visitor Survey (JTA)

[Part I] Tourism Trends in Japan in 2018 (Situation of Overnight Trips)

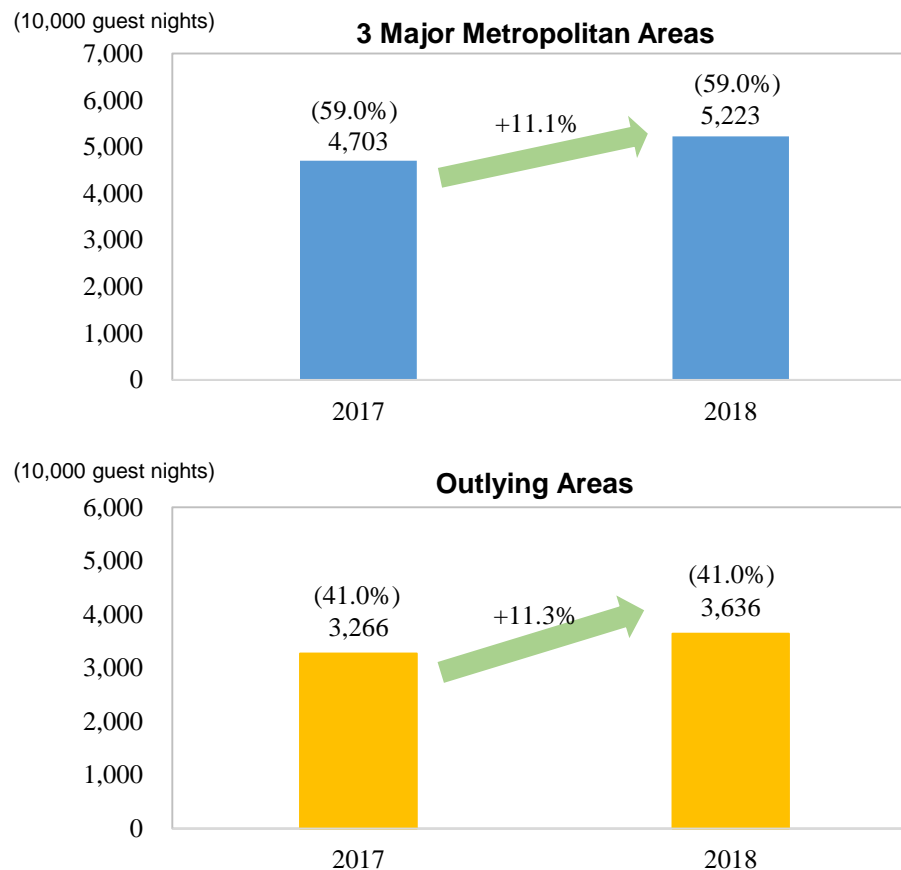
- In 2018, the total number of guest nights in hotels and Ryokans (Japanese-style inns) in Japan decreased to **509.02 million (down 0.1% from the previous year)**. Within that, the total number of guest nights of Japanese was 420.43 million (down 2.2% from the previous year), and the total number of guest nights of international visitors was 88.59 million (up 11.2% from the previous year).
- In 2018, the total number of guest nights of international visitors in outlying areas increased by 11.3% from the previous year, exceeding the growth in the 3 major metropolitan areas. The share of outlying areas was 41.0%.

(Figure I-32) Total Number of Guest Nights (Japanese/International Visitors)



Source: Overnight Travel Statistics Survey (JTA)
 Note 1: Figures for 2018 are preliminary.
 Note 2: Figures given above each bar indicate the total number of guest nights of Japanese and international visitors.

(Figure I-33) Guest Nights of International Visitors in 3 Major Metropolitan Areas and in Outlying Areas



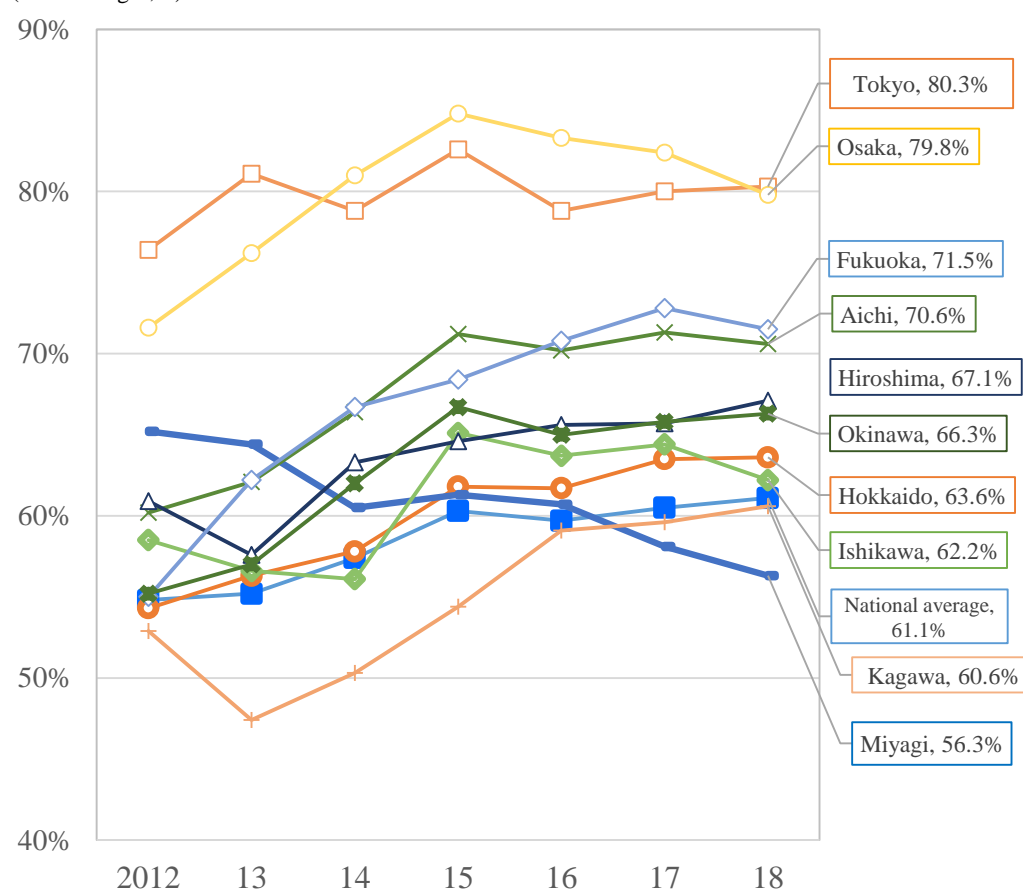
Source: Overnight Travel Statistics Survey (JTA)
 Note 1: Figures for 2018 are preliminary.
 Note 2: "3 major metropolitan areas" refers to 8 prefectures: Tokyo, Kanagawa, Chiba, Saitama, Aichi, Osaka, Kyoto, and Hyogo. "Outlying areas" refers to all other prefectures.
 Note 3: Values in parentheses indicate the composition rate.

[Part I] Tourism Trends in Japan in 2018 (Situation of Overnight Trips)

- The national average for room occupancy rates rose from **60.5%** in the previous year to **61.1%** in 2018. In particular, the room occupancy rate was high, over 80%, in Tokyo.
- By accommodation type, the room occupancy rate for city hotels was 79.9%, that for business hotels was 75.3%, and for Ryokans (Japanese-style inns) it was 39.0%.

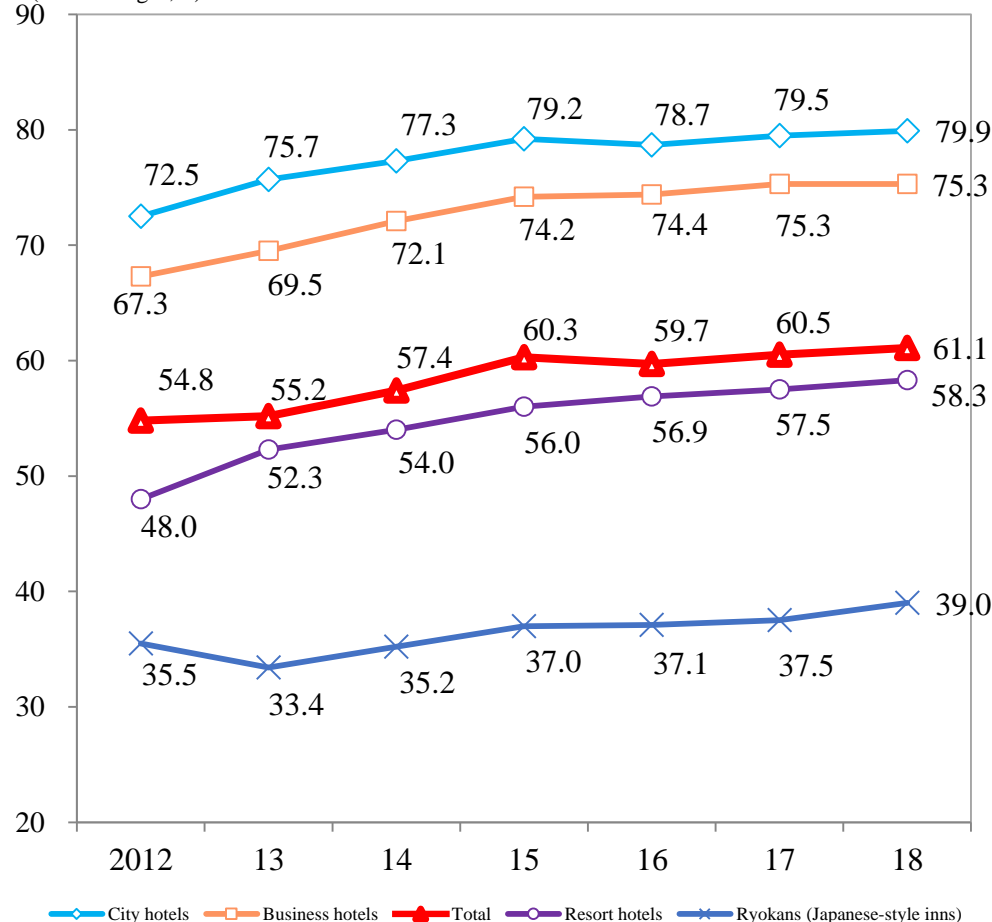
(Figure I-35) Room Occupancy Rates

(YoY changes,%)



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

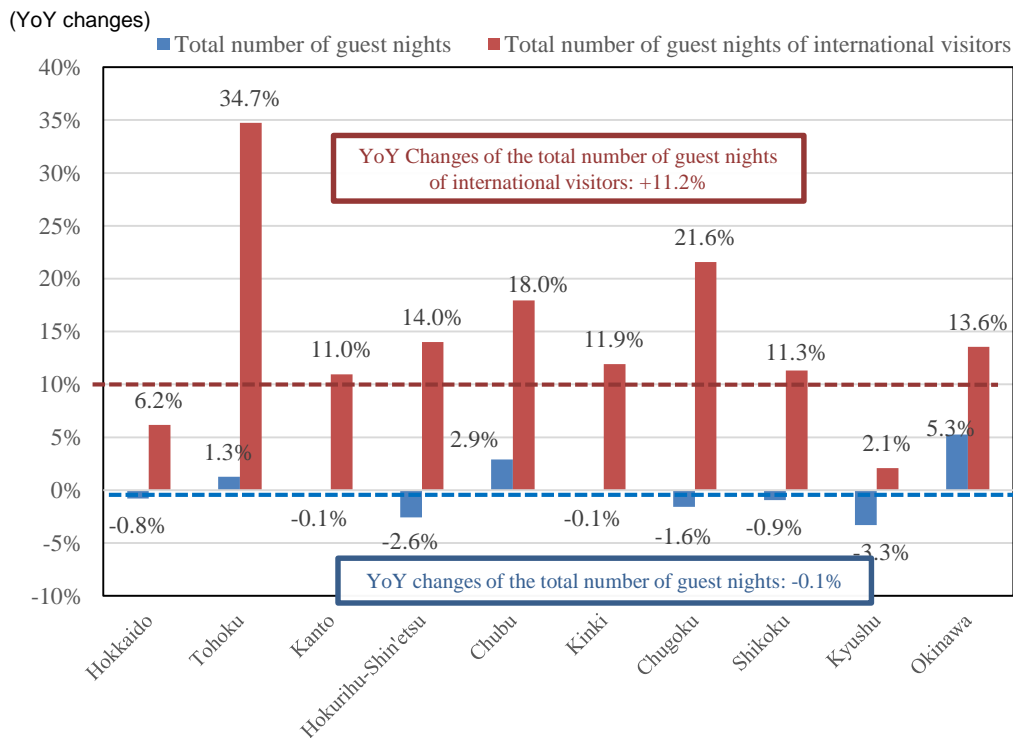
(YoY changes,%)



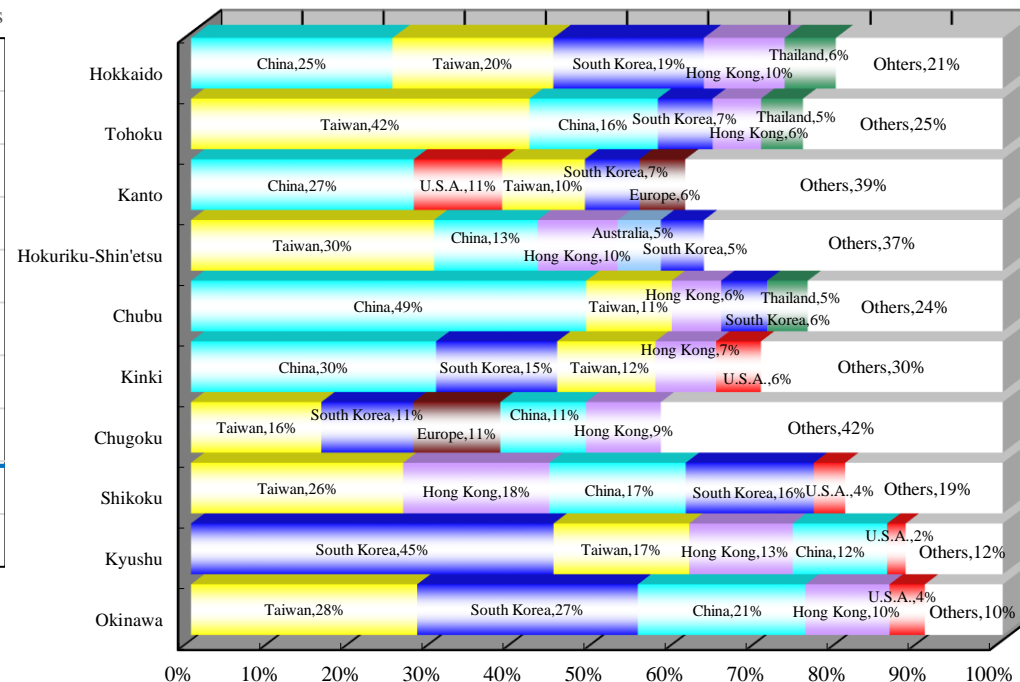
[Part I] Trends in Japanese Tourism in 2018 (Regional Blocks)

- The total number of guest nights of international visitors in the Tohoku and Chugoku regions compared to the previous year, by 34.7% and 21.6%, respectively. Hokuriku-Shin'etsu (up 14.0%), Chubu (up 18.0%), Kinki (up 11.9%), Shikoku (up 11.3%), and Okinawa (up 13.6%) also exceeded the national average.
- The total number of guest nights of international visitors from China was the highest in 4 regions (Hokkaido, Kanto, Chubu, and Kinki), that from South Korea was the highest in 1 region (Kyushu), and that from Taiwan was the highest in 5 regions (Tohoku, Hokuriku-Shin'etsu, Chugoku, Shikoku, and Okinawa).

(Figure I-43) YoY Changes of the Total Number of Guest Nights (Overall/International Visitors) in Japan by Regional Blocks (2018)



(Figure I-44) Regional Blocks Breakdown for the Total Number of Guest Nights of International Visitors by Country/Region (2018)



Source: Overnight Travel Statistics Survey (JTA)
 Note 1: Comparison was made between the figures of 2017 (confirmed) and 2018 (preliminary).

Source: Overnight Travel Statistics Survey (JTA)
 Note 1: Figures for 2018 are preliminary.
 Note 2: "Europe" refers to 6 countries: Germany, the United Kingdom, France, Russia, Italy, and Spain.

[Part II] Economic Effects of Tourism Expanding across Japan

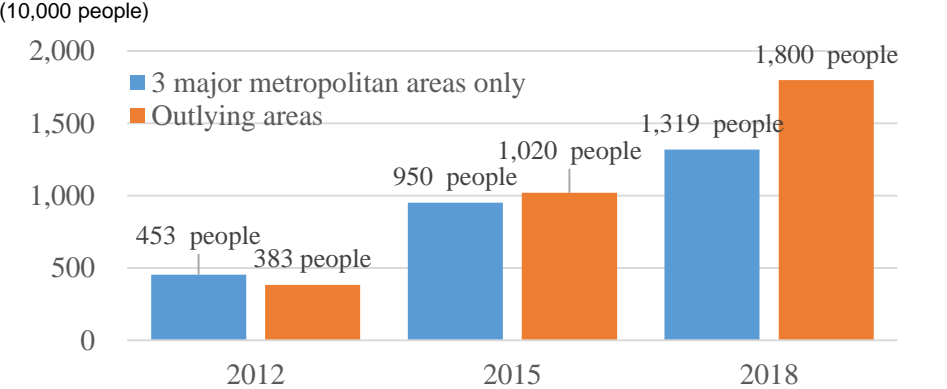
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[Part II] Increase in International Visitors in Outlying Areas and Trends in Experience-oriented Consumption (1)

○ In recent years, international visitors visiting areas other than the 3 major metropolitan areas have been increasing. The growing interest of international visitors to Japan in "experience-oriented consumption" is considered one of the factors.

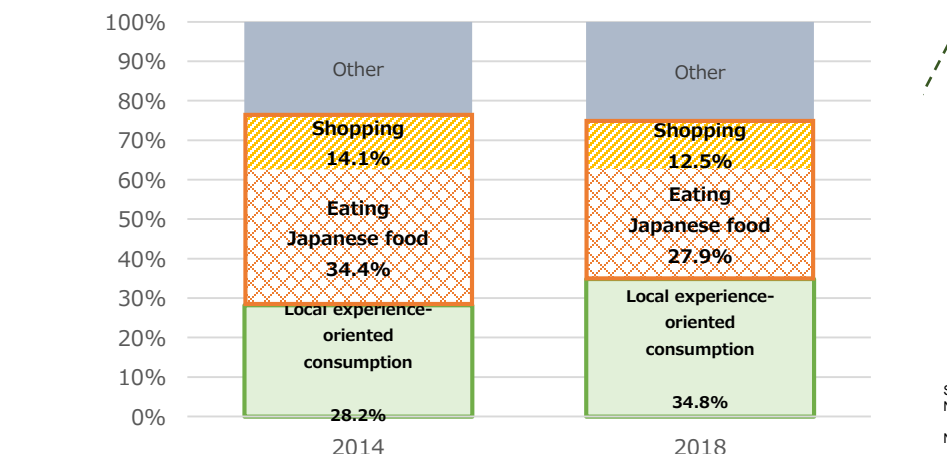
• In 2018, the number of international visitors visiting outlying areas was 1.4 times that visiting only the 3 major metropolitan areas.

(Figure II-6) Changes in the Number of International Visitors to Japan by Destination (Metropolitan Areas/Outlying Areas)



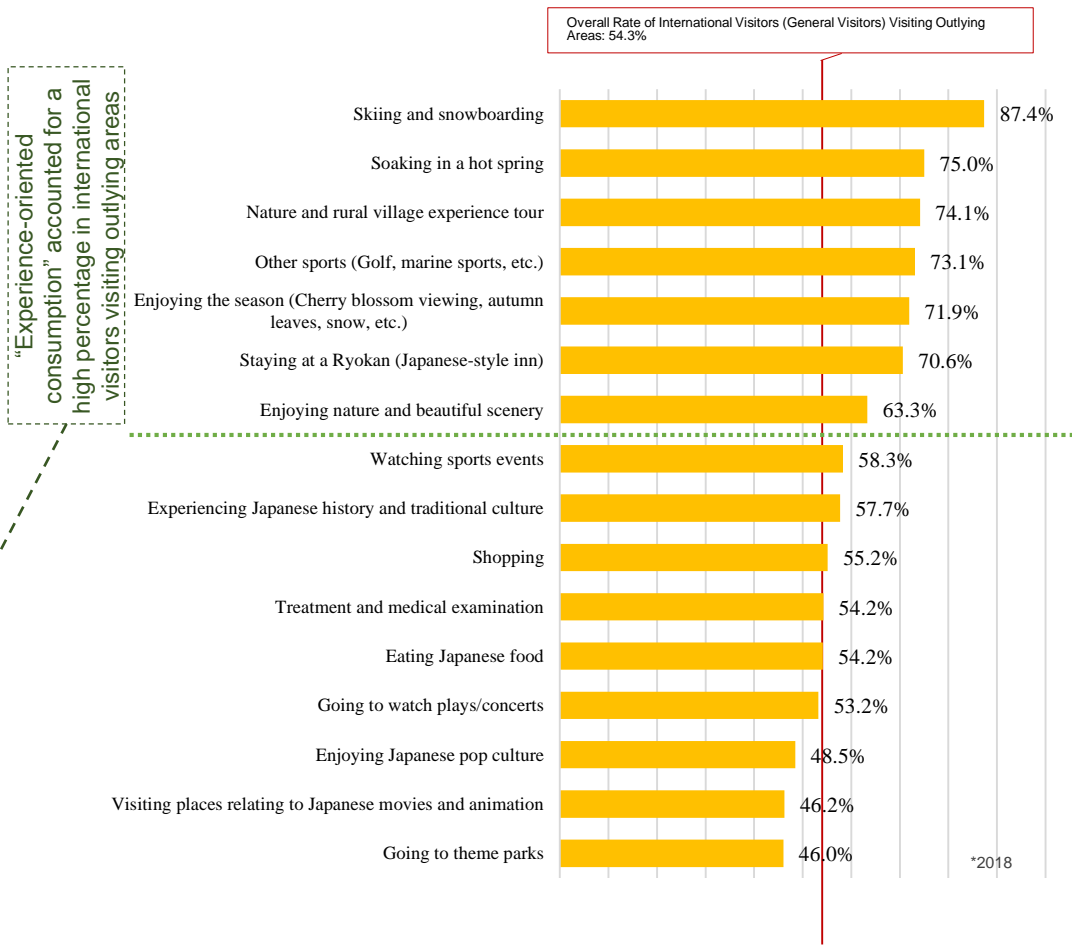
• The percentage of international visitors who looked most forward to "local experience-oriented consumption," which accounted for over 60% in international visitors visiting outlying areas, before their visit to Japan increased by 6.6 points in the past 5 years.

(Chart II-7-2) "What You wanted to do most before Visiting Japan"



• International visitors to Japan who focus on "experience-oriented consumption," such as skiing and snowboarding, have a high rate of visiting outlying areas.

(Figure II-7-1) Rate of International Visitors (General Visitors) Visiting Outlying Areas by "Activities Carried Out during Stay in Japan"



"Experience-oriented consumption" accounted for a high percentage in international visitors visiting outlying areas

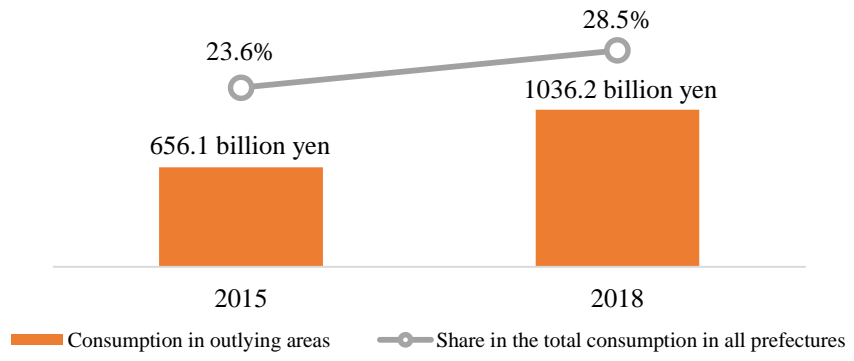
Source: JTA document based on International Visitor Survey (JTA) and Number of International Visitors to Japan (JNTO)
 Note 1: "3 major metropolitan areas" refers to 8 prefectures: Tokyo, Kanagawa, Chiba, Saitama, Aichi, Osaka, Kyoto, and Hyogo, and "Outlying areas" refers to all other prefectures.
 Note 2: The percentages above are the percentage of international visitors who visited outlying areas among those subject to the Consumption Trend Survey for Foreigners Visiting Japan and who selected the items above as "activities carried out during stay in Japan."

[Part II] Increase in International Visitors in Outlying Areas and Trends in Experience-oriented Consumption (2)

○ Consumption by international visitors to Japan has also increased in outlying areas. "Experience-oriented consumption" contributes to the expansion of consumption.

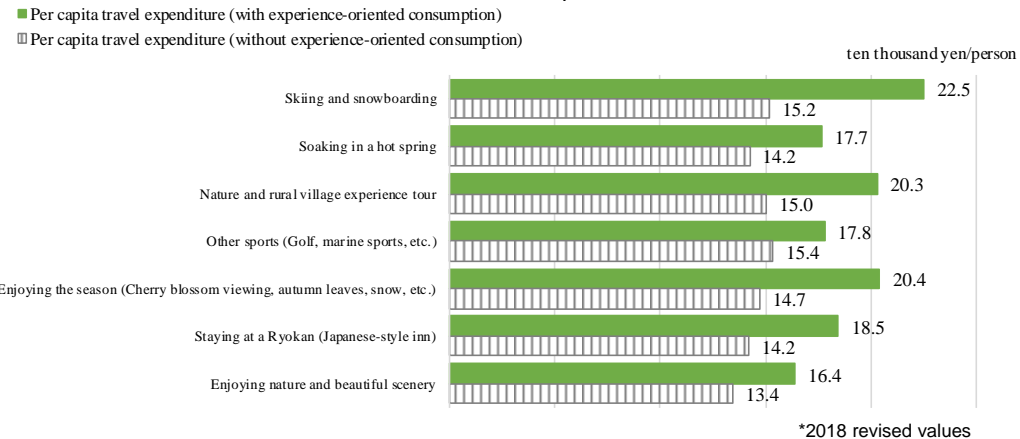
• Consumption by international visitors to Japan was over 1 trillion yen in outlying areas, accounting for about 30% of the total consumption in all prefectures.

(Figure II-8) Tourism Consumption and Share of International Visitors in Outlying Areas



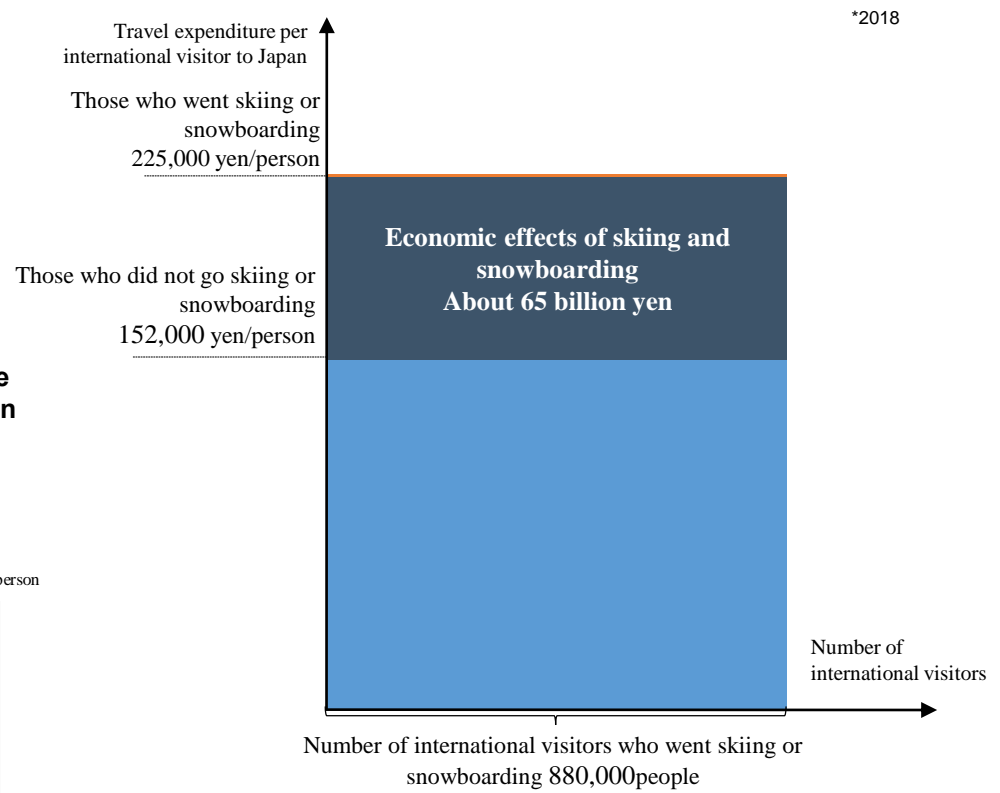
• According to the survey on changes in travel expenditure per international visitor classified into with or without "experience-oriented consumption," the expenditure was larger in those with "experience-oriented consumption" than those without.

(Figure II-12) Per Capita Travel Expenditure According to With or Without "Experience-oriented Consumption"



• The estimated economic effect of skiing and snowboarding is about 65 billion yen, which is calculated based on the difference in travel expenditure per international visitor according to whether or not they went skiing or snowboarding, and the number of international visitors who went skiing or snowboarding.

(Figure II-15) Economic Effects of Skiing and Snowboarding



• It is expected that any "experience-oriented consumption" can increase the economic effects of international visitors.

Source: JTA document based International Visitor Survey (JTA)
 Note: "3 major metropolitan areas" refers to 8 prefectures: Tokyo, Kanagawa, Chiba, Saitama, Aichi, Osaka, Kyoto, and Hyogo, and "Outlying areas" refers to all other prefectures.

[Part II] Increase in International Visitors in Outlying Areas and Trends in Experience-oriented Consumption (3)

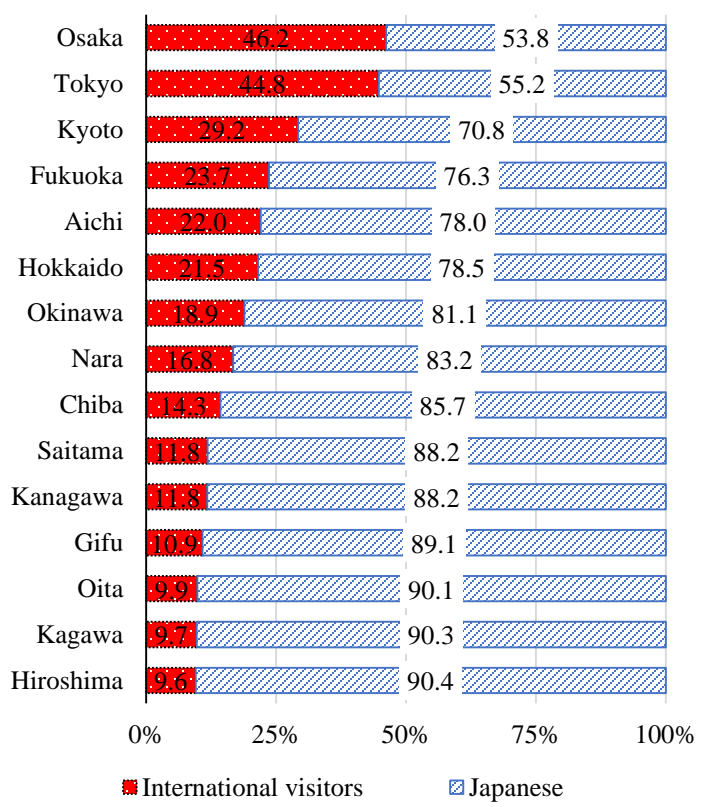
○ In Osaka and Tokyo, inbound tourism consumption accounts for more than 40% of the total tourism consumption.

• Osaka, Tokyo, Kyoto, Fukuoka, and Aichi are the top prefectures in terms of the share of tourism consumption by international visitors to Japan in the total tourism consumption by Japanese and international visitors.

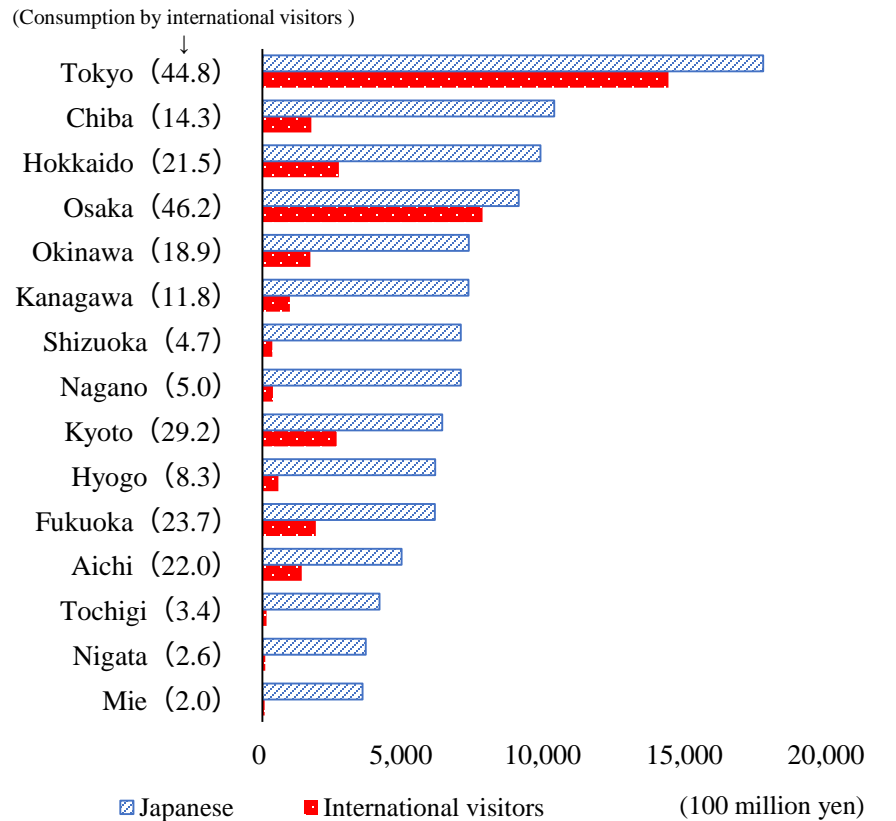
• On the other hand, the tourism consumption of international visitors is not necessarily high in prefectures where the tourism consumption by Japanese is high.

(Column Figure II-5-1) Tourism Consumption by International Visitors (By Prefecture)

Top 15 Prefectures Having High Tourism Consumption by International Visitors



Tourism Consumption by International Visitors in the Top 15 Prefectures Having Large Tourism Consumption by Japanese



Sources: National Tourism Survey (JTA) and International Visitor Survey (JTA)
 Note: For tourism consumption by Japanese, expenditures before and after travel and inter-prefectural transportation costs are not allocated to each prefecture, and group tour costs are allocated to each prefecture after deducting travel agency margins and amounts equivalent to inter-prefectural transportation costs. For tourism consumption by international visitors, inter-prefectural transportation costs are not allocated to each prefecture, and group tour costs are allocated to each prefecture after deducting amounts equivalent to round-trip transportation costs between the country of departure and Japan and inter-prefectural transportation costs.

[Part II] Trends in Employment, Wages, and Productivity in Tourism-related Industries (1)

○ With the increase in inbound visitors, employment and wages in accommodation services have been increasing. Productivity has also been improving.

- The number of employees in accommodation services increased by 80,000 or 14.5% in the past 6 years from 2012. The growth in the number of female and elderly employees was particularly large.

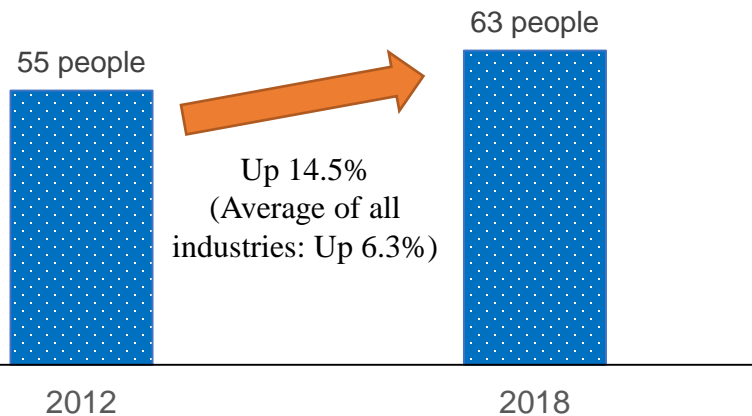
- The average wage in accommodation services rose by 11.0% in the past 6 years. Sales per employee increased by 13.8% in the past 4 years.

(Figure II-28) The Number of Employees in accommodation services

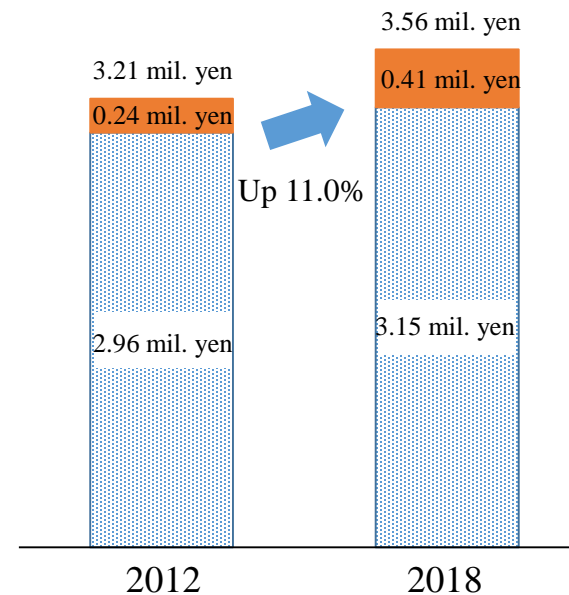
(Figure II-32) Wages in accommodation services

(Figure II-35) Amount of Sales per Employee in accommodation services

(10,000 people)



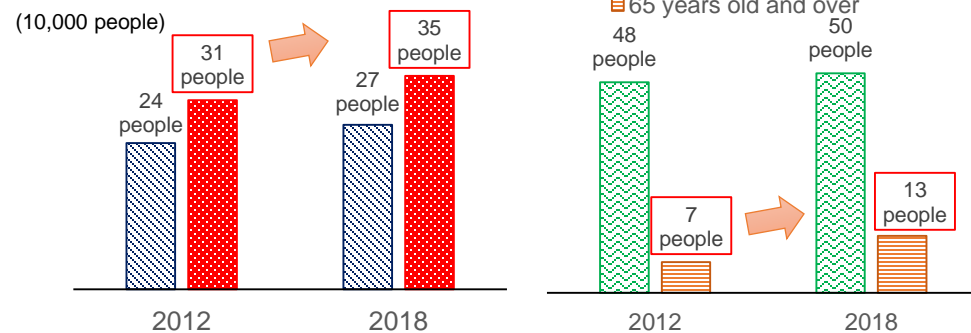
■ Annual bonuses and other special salaries
 ■ Regular cash earnings



■ Male ■ Female

■ 15 to 64 years old

■ 65 years old and over



Source: JTA document based on Basic Survey on Wage Structure (Ministry of Health, Labour and Welfare (MHLW))

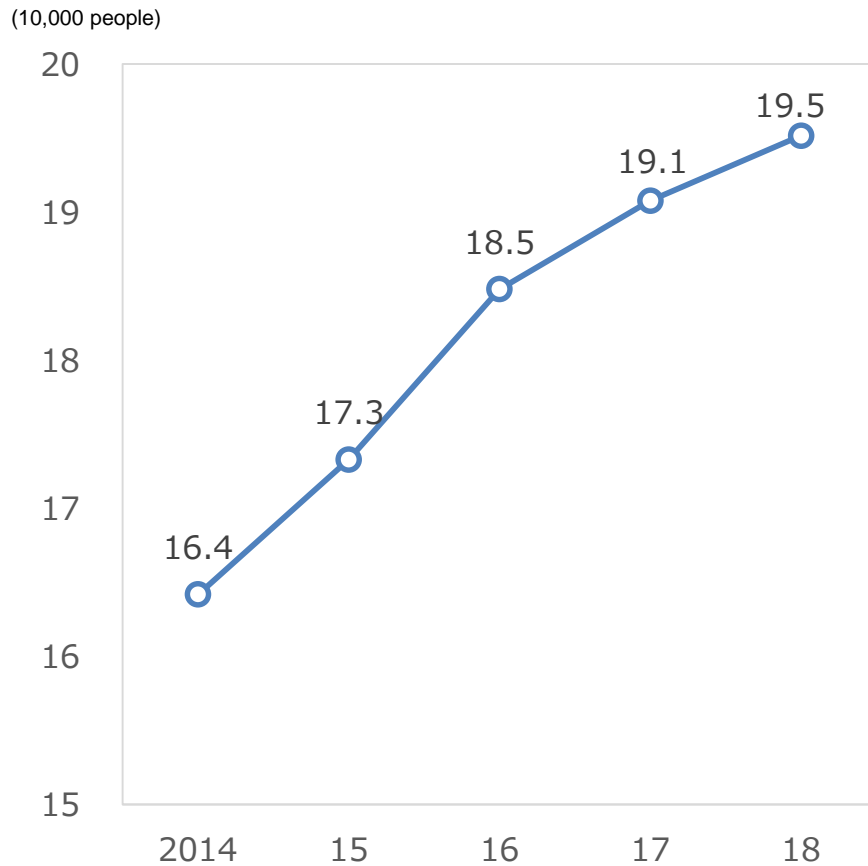
Source: JTA document based on 2016 Economic Census for Business Activity and 2012 Economic Census for Business Activity (Ministry of Internal Affairs and Communications (MIC))
 Note: The numbers of employees as of February 1, 2012 and June 1, 2016 are used.

[Part II] Trends in Employment, Wages, and Productivity in Tourism-related Industries (2)

○ In accommodation services, there has been a growing sense of labor shortage amid an increase in the number of new job offers, showing a tight supply-demand balance.

• The number of new job offers in accommodation services increased by 18.9% from 164,000 to 195,000 in the past 4 years from 2014.

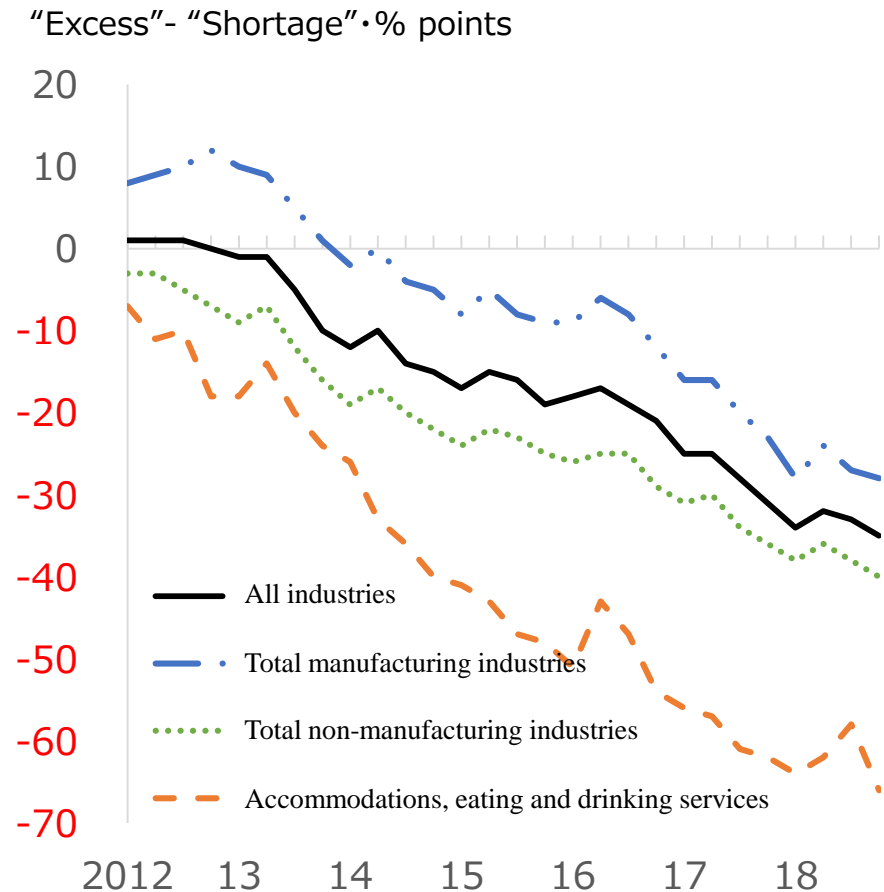
(Figure II-33) The Number of New Job Offers in accommodation services



Source: JTA document based on Employment referrals for general workers (MHLW)

• Labor shortage in accommodations, eating and drinking services continues to grow faster than that in other industries.

(Figure II-34) Diffusion Index (DI) for Employment

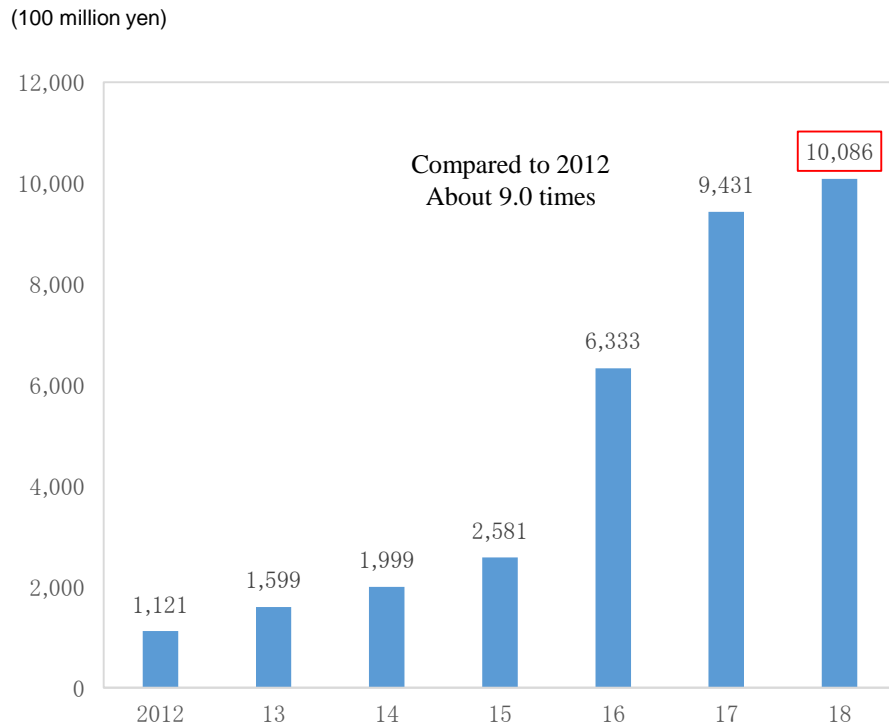


Source: JTA document based on Short-Term Economic Survey of Enterprises in Japan (Bank of Japan)

○ With the increase in inbound visitors, construction investment in accommodation services has been expanding in many regions.

- In 2018, the planned building construction costs in accommodation services was over 1 trillion yen, which increased by a factor of 9.0 times in the past 6 years.

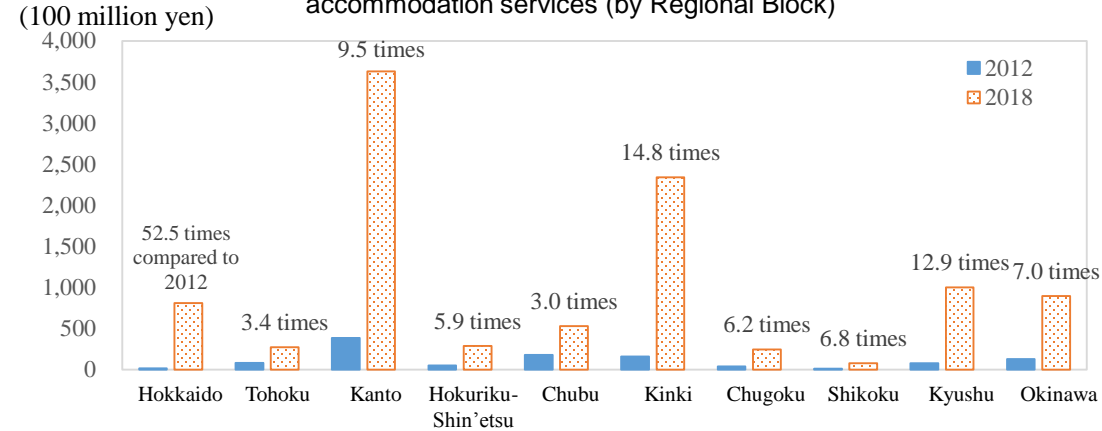
(Figure II-36) The Planned Building Construction Costs in accommodation services



Source: JTA document based on Building Starts (Ministry of Land, Infrastructure, Transport and Tourism (MLIT))

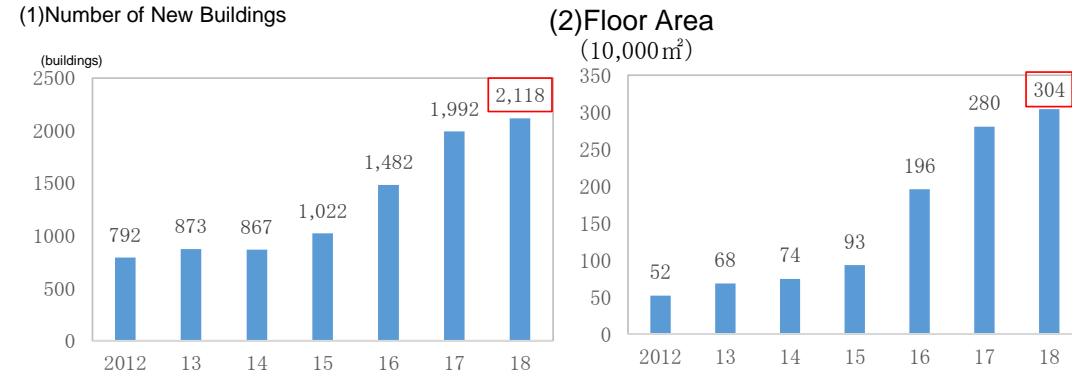
- By regional block, the planned construction costs increased more than tenfold in the Hokkaido, Kinki, and Kyushu regions in the past 6 years.

(Figure II-38) Changes in the Planned Building Construction Costs in accommodation services (by Regional Block)



- The number of new buildings and floor area in accommodation services increased by factors of 2.7 times and 5.9 times in the past 6 years, respectively.

(Figure II-37) The Number of New Buildings and Floor Area in accommodation services

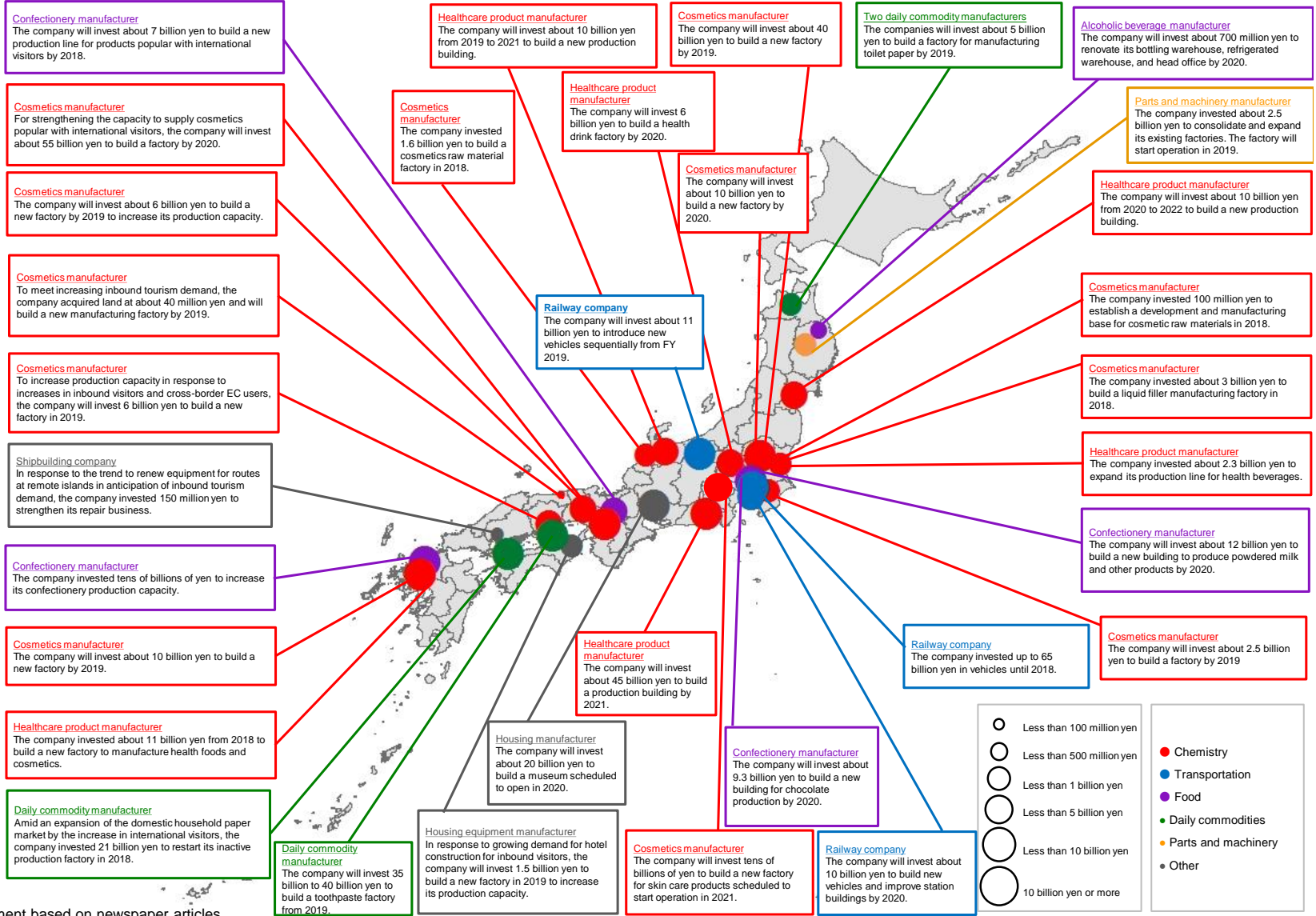


Source: JTA document based on Building Starts (Ministry of Land, Infrastructure, Transport and Tourism (MLIT))

[Part II] Trends in Investment in Tourism-related Industries (2)

○ Inbound tourism demand generates investment in a wide range of industries, including not only the hotel industry but also the manufacturing industry, and across Japan.

(Figure II-40) Examples of Investments for Responding to Inbound Tourism Demand

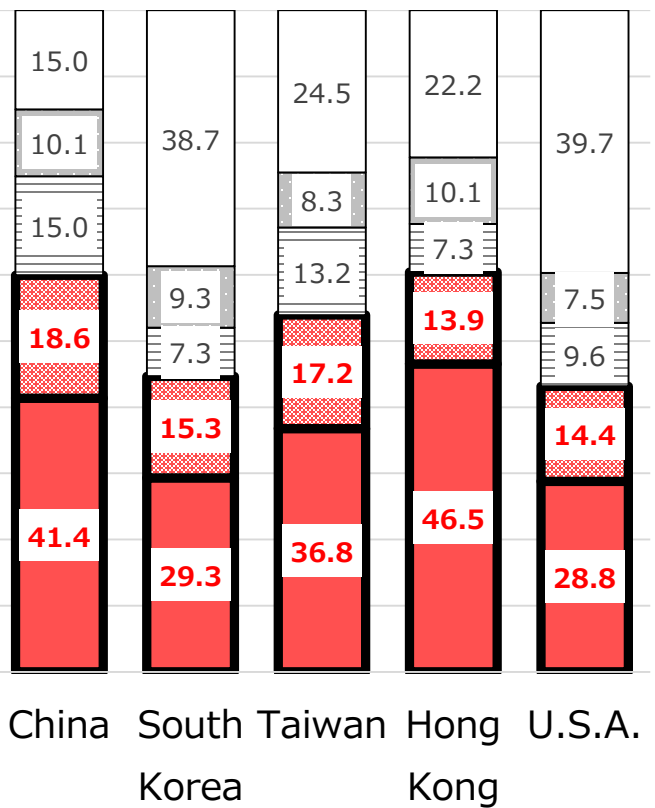


Source: JTA document based on newspaper articles

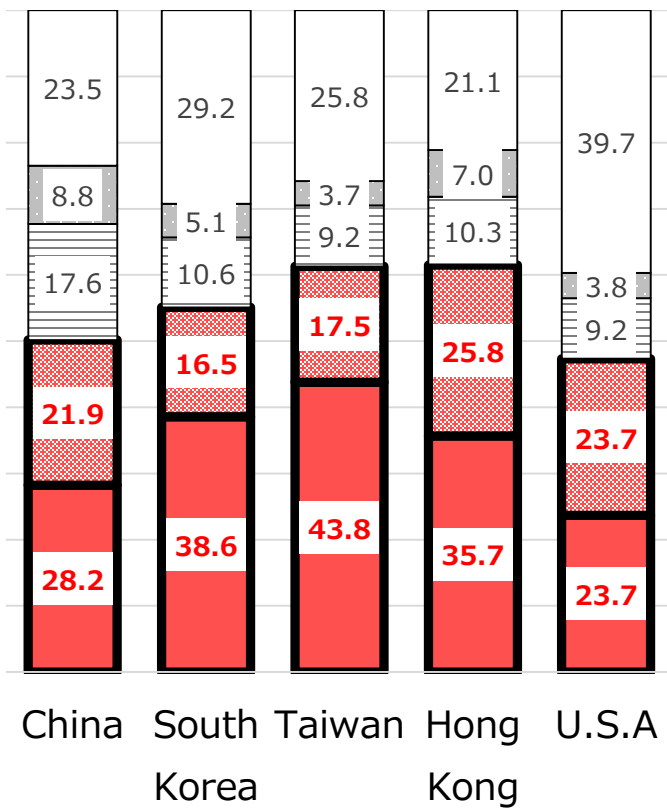
[Part II] Trends in Consumption after Travel to Japan by Country

○ In each country and region, around half of the purchases of Japanese food products and the use of Japanese restaurants come from people who have traveled to Japan.

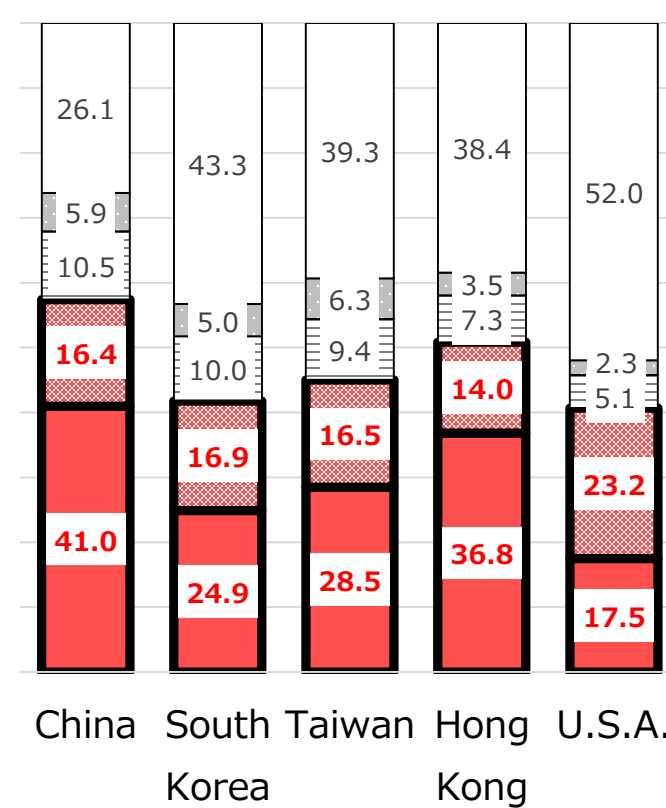
(Figure II-42) Motives for Purchasing Japanese Products (Agricultural, Livestock, and Fishery Products including Prepared Products)



(Figure II-43) Motives for Purchasing Japanese Products (Alcoholic Beverages)



(Figure II-47) Motives for Visiting Japanese Chain Restaurants



■ My travel to Japan
 ■ My family member's or acquaintance's travel to Japan
 ■ Information and articles on travel to Japan
 ■ Other

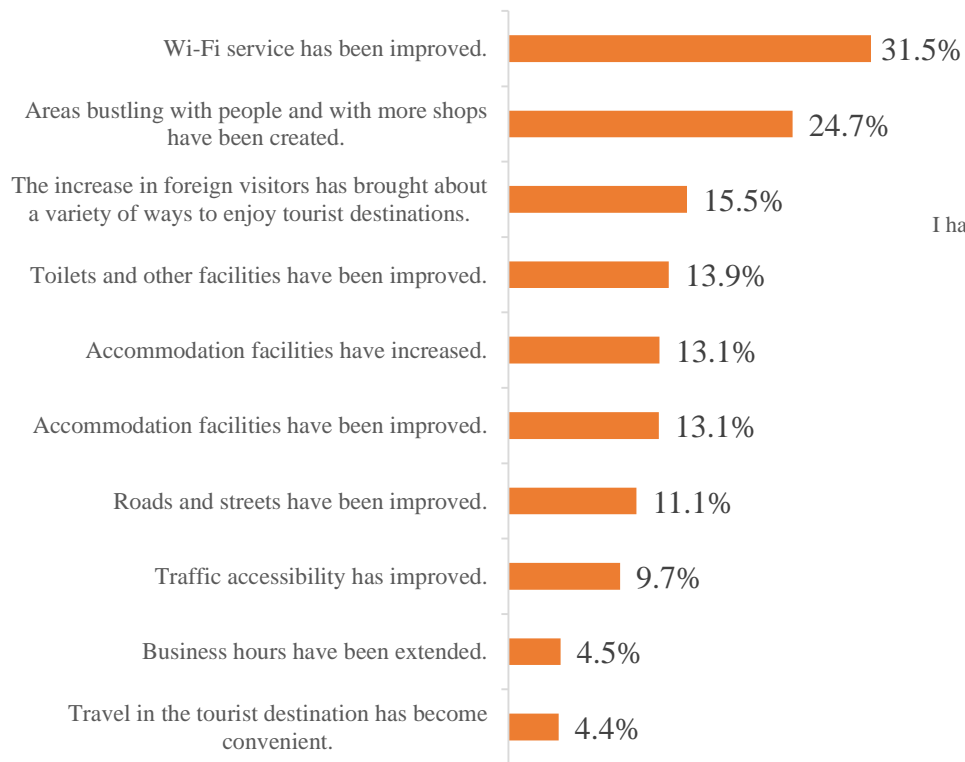
■ My family member's or acquaintance's travel to Japan
 ■ TV programs and special articles on travel to Japan

Source: JTA document based on an overseas questionnaire survey
 Note 1: Date of survey: February 2019

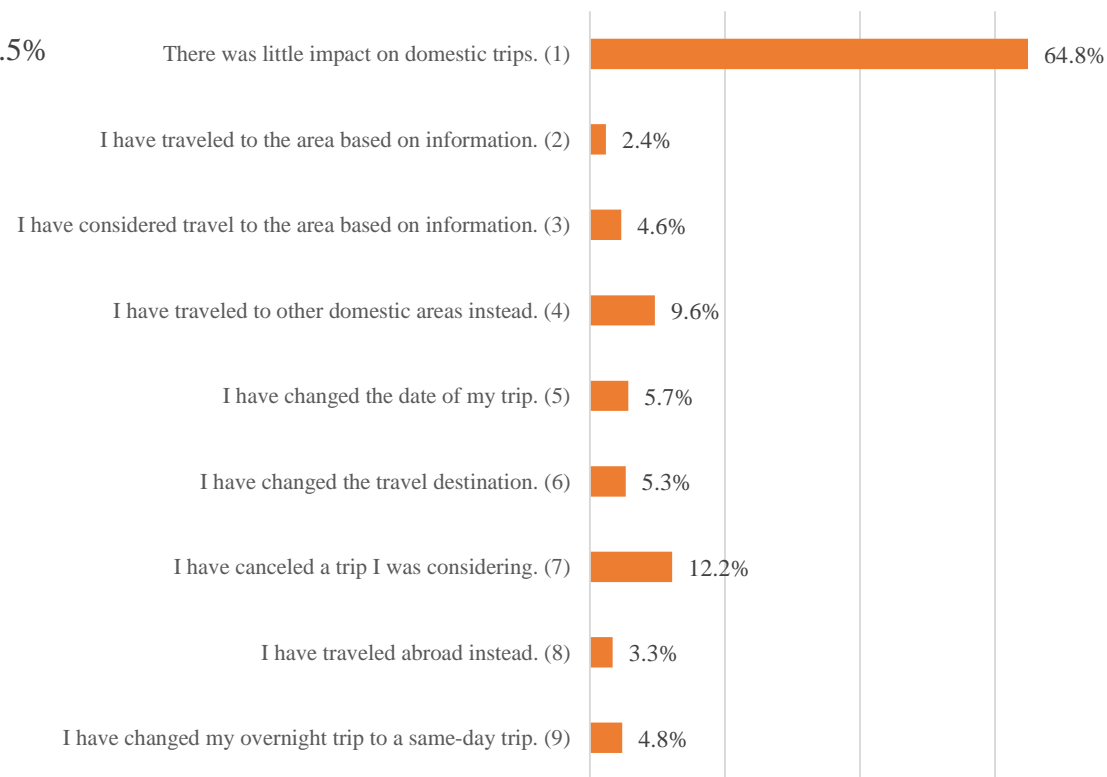
[Part II] Impact of Increase in International Visitors to Japan on Tourist Destinations (1)

- The improvement of Wi-Fi service and the creation of areas bustling with people are main positive effects of the increase in the number of international visitors to Japan.
- As for the impact of increase in the number of international visitors to Japan on domestic trips, the most common answer was "There was little impact" (about 65%).

(Figure II-49) Positive Impact of Increase in International Visitors to Japan on Tourist Destinations



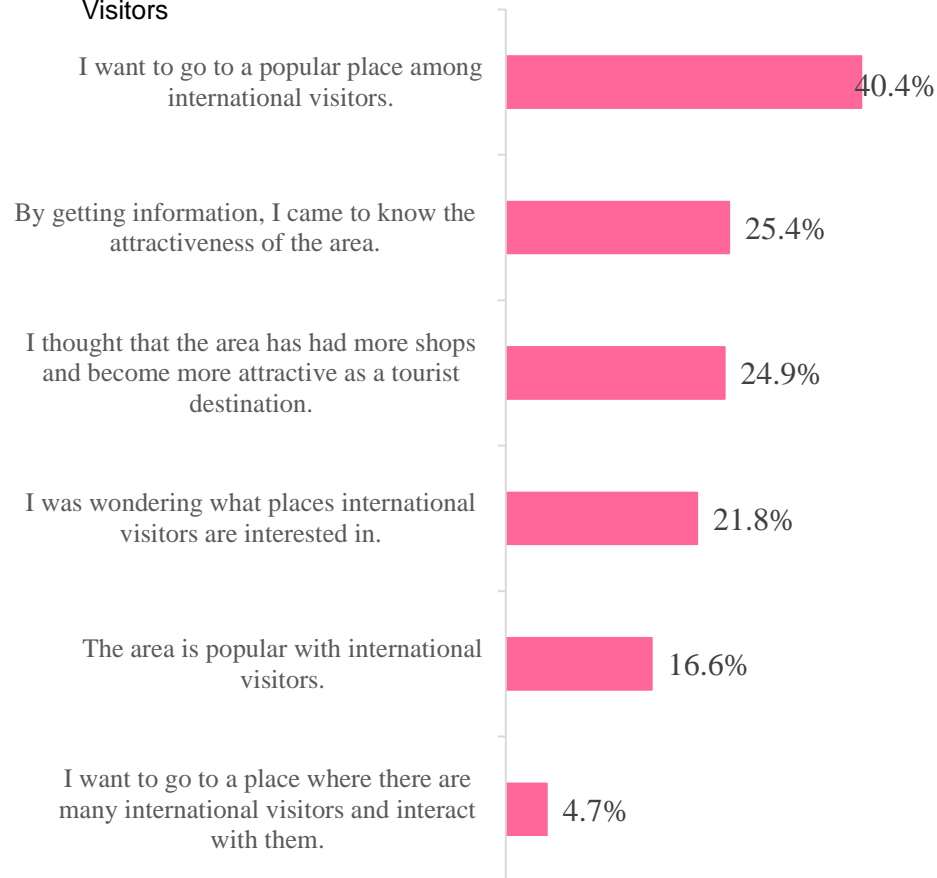
(Figure II-50) How the Information on the Increase in International Visitors to Japan in Tourist Destinations Affected the Decision of One's Trip



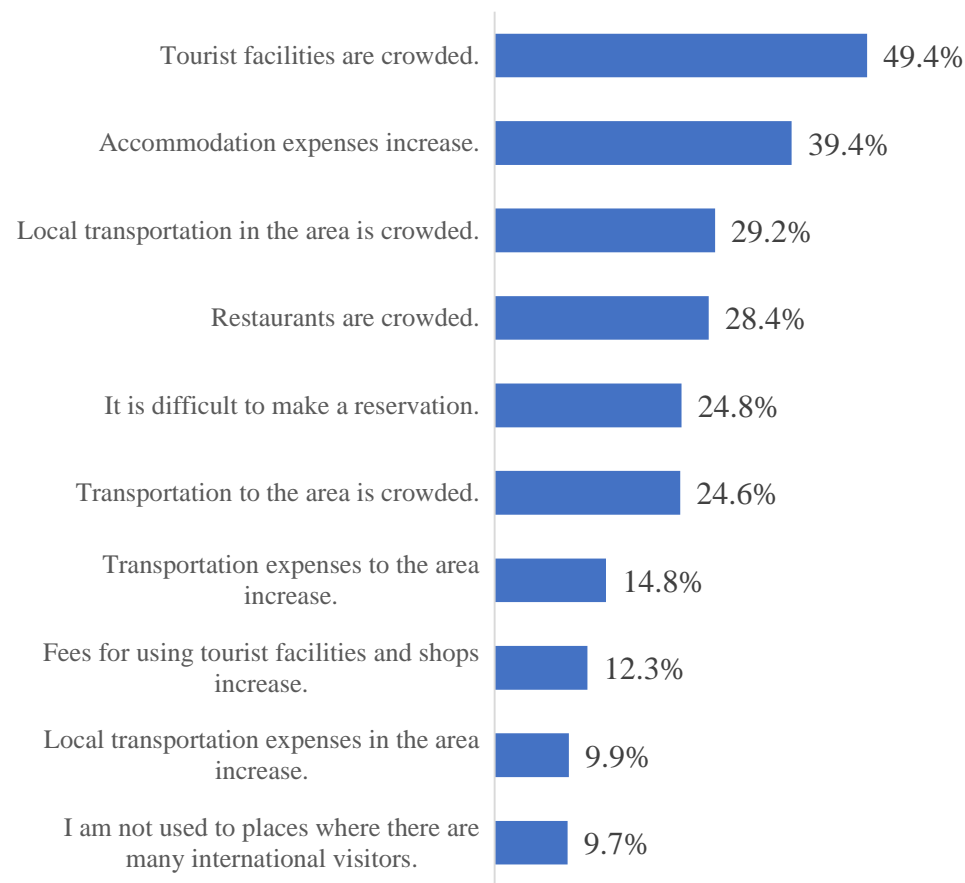
[Part II] Impact of Increase in International Visitors to Japan on Tourist Destinations (2)

- The increase in the number of international visitors to Japan has become a motive for domestic trips by Japanese. For example, they make or consider a domestic trip for reasons that they “want to go to a popular place among international visitors” and “can learn about the attractiveness of the tourist destination.”
- On the other hand, there are people who refrain from making a domestic trip for reasons that "tourist facilities are crowded" and "accommodation expenses increase."

(Figure II-51) Reasons for Making or Considering a Domestic Trip based on the Information on the Increase in International Visitors



(Figure II-52) Reasons for Refraining from Making a Domestic Trip



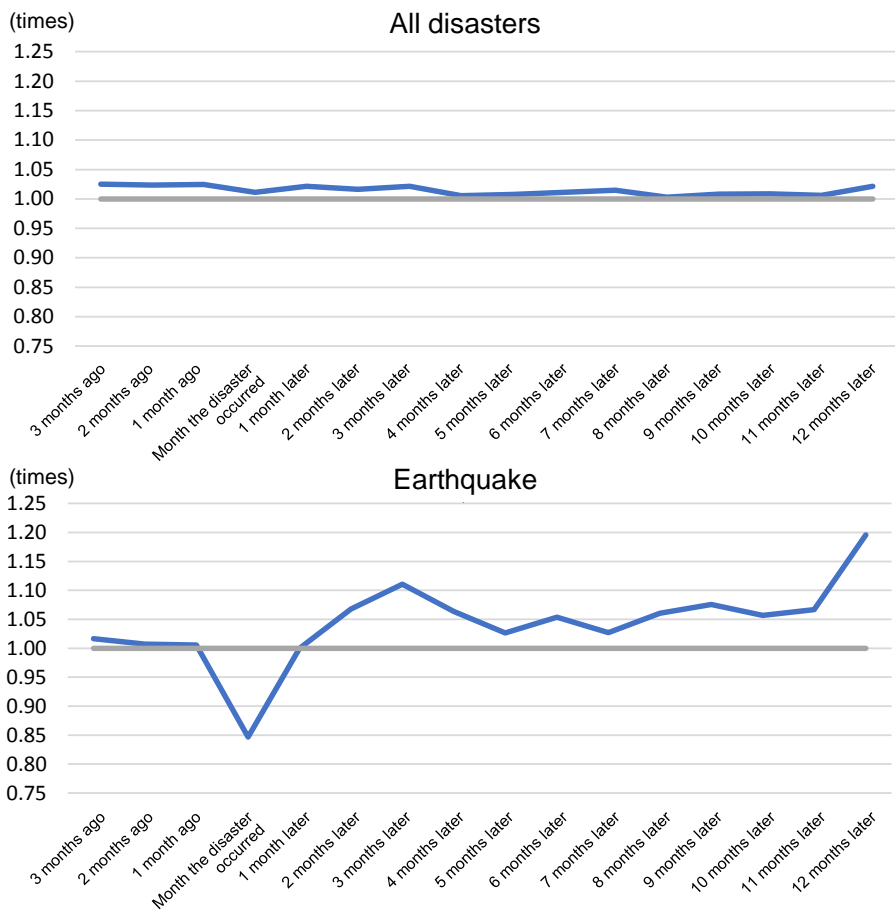
Source: JTA document based on a domestic questionnaire survey
 Note 1: Date of survey: February 2019
 Note 2: The survey was about items (2) and (3) in Figure II-50 and was conducted for respondents who selected at least one of the items.

Source: JTA document based on a domestic questionnaire survey
 Note 1: Date of survey: February 2019
 Note 2: The survey was about items (7), (8), and (9) in Figure II-50 and was conducted for respondents who selected at least one of the items.

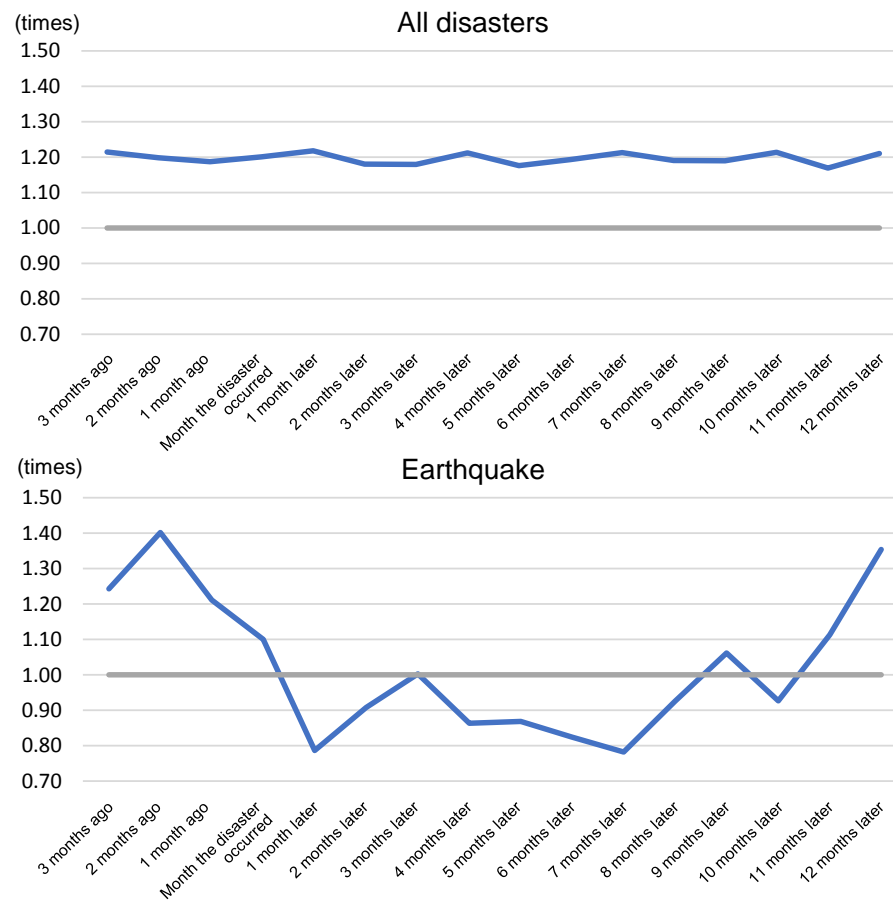
[Part II] Impact of Natural Disasters on Travel (1)

○ The total number of guest nights, particularly that of international visitors, tends to decline in areas affected by an earthquake designated as an "specified emergency disaster," "extremely severe disaster," or "disaster subject to the Disaster Relief Act."

(Figure II-53) The Total Number of Guest Nights (of Japanese) Before and After the Disaster Compared to the Same Month of the Previous Year



(Figure II-54) The Total Number of Guest Nights (of International Visitors) Before and After the Disaster Compared to the Same Month of the Previous Year



Source: JTA document based on Overnight Travel Statistics Survey (JTA) and White Paper on Disaster Management (Cabinet Office)

Note 1: The data above are YoY changes of the total number of guest nights of Japanese nationals and that of international visitors in prefectures affected by a "specified emergency disaster," "extremely severe disaster," or "disaster subject to the Disaster Relief Act" that occurred between April 2008 and 2017, during the period from 3 months before the disaster and 12 months after the disaster (Disasters subject to the survey: 6 (earthquake), 112 (heavy rain), 9 (heavy snowfall), 2 (volcanic eruption), and 48 (other disasters)).

Note 2: With regard to prefectures affected by the disasters, those affected by an "extremely severe disaster (local disaster designated in the middle of the year)," "extremely severe disaster (local disaster designated at the end of the year)," or "disaster subject to the Disaster Relief Act" are defined as prefectures to which the applicable municipalities belong, and those affected by other disasters are defined as prefectures specified as "major disaster-affected areas" in the "Application results of extremely severe disasters in the past 5 years" in the attached document of the White Paper on Disaster Management.

Note 3: Figures for Overnight Travel Statistics Survey in 2018 are preliminary.

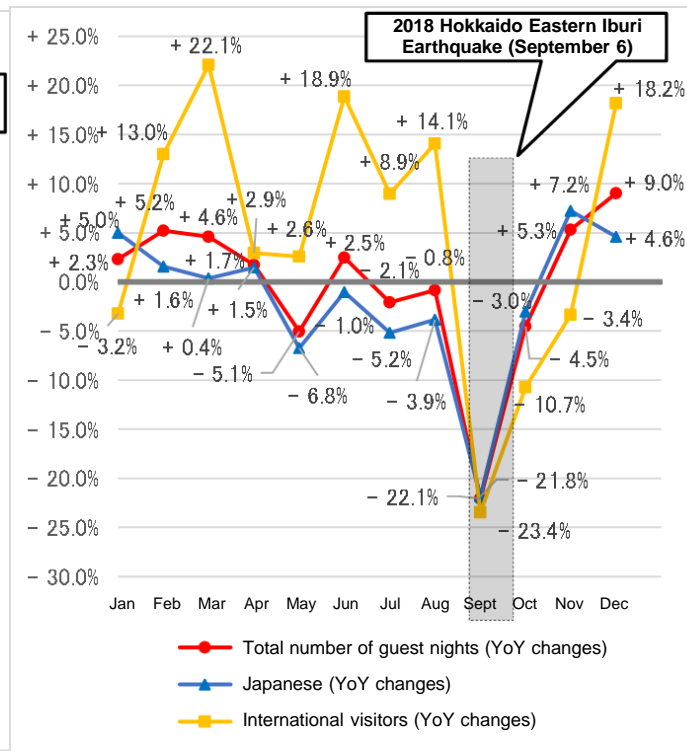
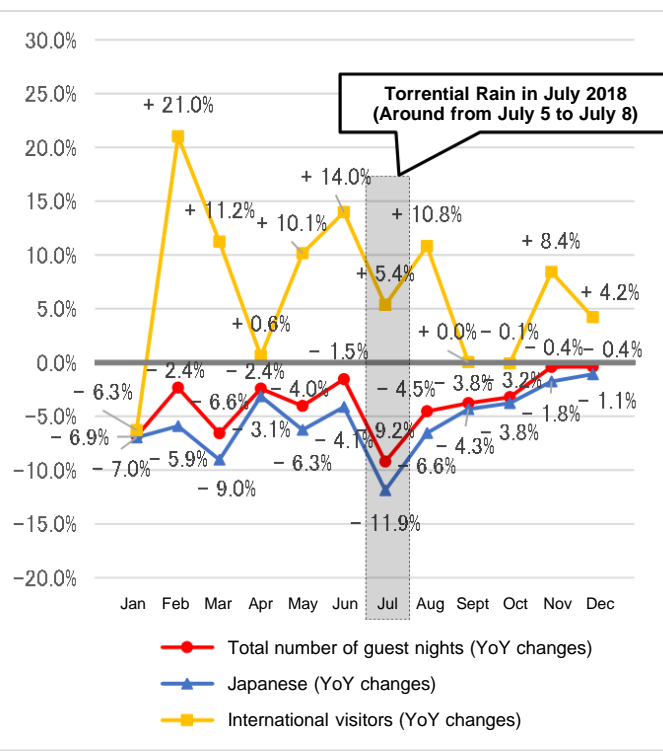
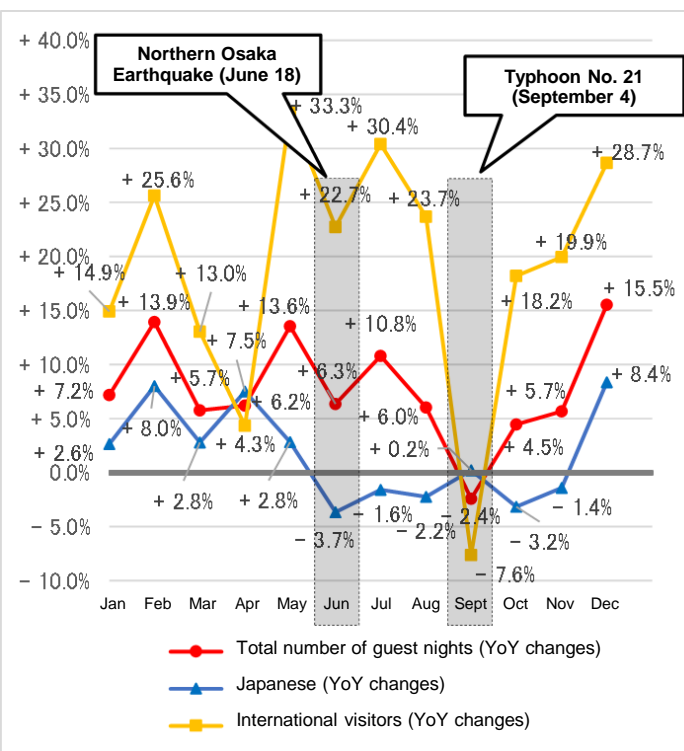
[Part II] Impact of Natural Disasters on Travel (2)

○ After the "Northern Osaka Earthquake," "Typhoon No. 21," "Torrential Rain in July 2018," and "2018 Hokkaido Eastern Iburi Earthquake", the total number of guest nights in disaster-affected areas temporarily decreased, but it recovered within a relatively short period of time thanks to the effects of "recovery discounts," etc.

(Figure II-55) Total Number of Guest Nights Before and After the Disaster
(Northern Osaka Earthquake and Typhoon No. 21)

(Figure II-56) Total Number of Guest Nights Before and After the Disaster
(Torrential Rain in July 2018)

(Figure II-57) Total Number of Guest Nights Before and After the Disaster
(2018 Hokkaido Eastern Iburi Earthquake)



Source: Overnight Travel Statistics Survey (JTA)
Note: Figures for 2018 are preliminary.

[Part II] Examples of Regional Efforts (Column)

Cycle tourism (Setouchi Shimanami Kaido)

In order to address the population decline and stagnation of regional economy, etc., local governments along the road are making efforts to increase the non-resident population through cycling.

Specifically, the efforts include the development of an environment to accept cyclists from the perspective of cyclists, effective domestic and international promotional activities, and holding an international cycling competition. Through these efforts, the governments won the grand prize at the "2016 Sports Culture Tourism Awards." They have **established a brand as a "sacred ground for cyclists" and have been working to revitalize the region and to promote tourism for long-stay visitors through cycling.**



Setouchi Shimanami Kaido

Decentralization through visualization of the tourism comfort (Kyoto City, Kyoto Prefecture)

Between November 10 and December 17 last year, the website called "Arashiyama comfortable sightseeing navigation" (Japanese and English) was set up to **predict and visualize the tourism comfort (the degree to which visitors can enjoy sightseeing comfortably) by date and area (shown below)**, based on Wi-Fi access data.

Visitors can check the tourism comfort by time zone by selecting the date and area they want to visit. They can check the tourism comfort for 8 areas, including Okusaga, Daikaku-ji Temple and Togetsukyo Bridge, and the whole Arashiyama area.



Display the tourism comfort for a specific area by time zone



Display the tourism comfort for the whole Arashiyama area by time zone

*Blue indicates areas where visitors can enjoy sightseeing relatively comfortably and red indicates areas where they will be relatively crowded.

Pilot program for priority entry of regional residents in public transportation (Kamakura City, Kanagawa Prefecture)

In order to facilitate the smooth travel of residents living along the line, the City has conducted a pilot program since 2017 during the Golden Week period when Enoden (Enoshima Electric Railway) is most crowded. The program allows residents living along Enoden to enter Kamakura Station without waiting in line outside the Station.

Specifically, **the residents are allowed to enter the Station preferentially and join the line by presenting the "Certificate of Residents Living along the Enoden" issued by Kamakura City in advance.**

By giving priority to regional residents during the busiest hours of the day, the waiting time was reduced by up to 20 minutes last year. According to the questionnaire, the program was well received by regional residents and also gained the understanding of many tourists.



A scene from the pilot program

[Part III] Measures Taken in FY 2018

(1) Enhance the Attractiveness of Tourism Resources to be the Foundation for "Regional Revitalization"

- Drastic opening of attractive public facilities and infrastructure to the public
- Development of cultural assets as tourism resources
- Branding of national parks
- Enhancing the attractiveness of tourist destinations through the conservation and utilization of scenic tourism assets
- Establishment and formation of farming, mountain, and fishing villages for long stay
- Promoting the development of tourism towns utilizing Japanese traditional houses and other historical resources
- Development of new tourism resources
- Acquisition of tourism demand in local shopping districts and expansion of consumption of traditional crafts
- Improvement in regional tourist routes to meet world-class standards
- Promoting the formation of the "Tourism-oriented country showcase"
- Recovery of tourism in the Tohoku region

(2) Innovate the Tourism Industry to Enhance International Competitiveness and to Become Japan's Core Industry

- Comprehensive review of tourism-related regulations and systems
- Support for private lodging services
- Development and strengthening of tourism management personnel based on industry needs
- Urgently overcoming the shortage of accommodations and provision of accommodations to meet diverse needs
- Formation and development of world-class DMOs
- Ongoing development of the "tourist destination revitalization fund"
- Utilization of financial resources for the realization of a next-generation tourism-oriented country
- Strategic enhancement of the Inbound Tourism Promotion Project
- Strengthening external activities to deliver diverse attractiveness for promoting inbound tourism
- Promotion of inviting MICE
- Examination of IR legislative measures
- Strategic relaxation of visa requirements
- Revitalization of educational travel to Japan
- Enhancement of tourism education
- Revitalization of outbound travel by youth

(3) Create an Environment Where All Travelers can Enjoy Sightseeing Comfortably Without Stress

- Realization of innovative immigration using cutting-edge technology
- Promoting "integrated revitalization of tourism and communities" through community development activities by the private sector
- Dramatic improvement in the cashless environment
- Improvement in the communications environment and realization of an environment in which anyone can walk independently
- Providing information in multiple languages
- Enhancement of the system for accepting international patients as well as emergency patients
- Environment where people can experience the good security of "Japan, the safest country in the world"
- Completion of the "regional revitalization corridor"
- Strengthening gateway functions and promoting LCC service at regional airports
- Further increase in acceptance of cruise ships
- Innovation of public transportation environment
- Holiday reform
- Promoting universal design for the 2020 Tokyo Olympics and Paralympics

[Part IV] Measures to be Taken in FY 2019

(1) Environmental Development for Setting Specifications that Foreigners can Truly Enjoy

- Tourist destinations
- Transportation
- Cultural assets and national parks
- Farm stay

(2) Development of New Regional Tourism Contents

- Cultural assets
- National parks
- Public facilities and infrastructure
- Japanese traditional houses and castle/temple stay, etc.
- Farm stay
- Tourist destinations and transportation

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

(4) Other Measures Contributing to Increase in Consumption and Visitors in Outlying Areas

- Facilitation of immigration
- Strategic relaxation of visa requirements
- Airports
- MICE and IR
- Development of sustainable tourism communities
- Utilization of international tourist tax
- Outbound and domestic tourism
- Recovery of tourism in the Tohoku region
- Promoting the formation of the "Tourism-oriented country showcase"
- Tourism statistics