Efforts to Promote a Tourism-Oriented Nation

Japan Tourism Agency
November, 2009
Value of a Tourism-Oriented Nation

1. Promoting international tourism is to enhance the nation’s soft power
   - Building healthy relationships with foreign countries is a task of the country.
   - Grass-root exchanges through international tourism complement and enhance diplomatic relations between nations as well as making a big contribution to the national security.
   - Visitors from China and Korea to Japan greatly increased.
     - Yearly visitors: 1 million from China and 2.38 million from Korea (accounting for 40% of visitors in 2007)

2. Tourism is the trump card to stimulate economy in days of a declining birthrate and aging population
   - Tourism promotion is effective in expanding the number of people interacting and creating demand and thus revitalizing economy in the society with a declining birthrate and aging population
   - Domestic travel spending is ¥23.5 trillion. Its ripple effects on production is ¥53.1 trillion and result in 4.41 million jobs, 6.9% of the total workforce, created in 2007.
   - Visitors to Japan are one significant group of consumers. (The consumption by travelers to Japan in 2007: ¥1.5 trillion)

3. Revitalize regional communities through expansion of the number of people interacting
   - Local regions require new approaches to regional development measures. The expansion of the number of people interacting is a trigger device to revitalize the regional economy.
   - Building unique communities capable of attracting more visitors fosters the spirit of self-control and autonomy in those communities.

4. Improve the quality of lives of people by promoting a tourism-oriented nation
   - Baby boomers are retiring and searching for something to live for. Increased exchanges through tourism helps improve the quality of their lives including mental activities.
   - Promoting a tourism-oriented nation is a process of re-realizing Japan’s historical and cultural values and leads to reinvigoration of the appeal of Japan.

- Revitalization of Japan through the expansion of the number of people interacting through tourism -
### Recent Moves on Tourism Measures

**2003**  
31, Jan  Then Prime Minister Koizumi said in his policy speech to “double the number of overseas visitors to Japan to 10 million by 2010.”

1, Apr  The Visit Japan Campaign launched

24, Apr  The Japan Tourism Advisory Council compiled a report.

21, May  The first meeting of the Council of Related Ministers for the Realization of Japan As a Country Built on Tourism was held. (members: entire cabinet)

22, Sep  The minister of Land, Infrastructure, Transport and Tourism was appointed as minister in charge of tourism.

29, Sep  Then Prime Minister Abe declared in his policy speech to "increase the number of major international conferences by over 50% in the next five years and make Japan one of the major conference-hosting countries in Asia."

13, Dec  The Tourism Nation Promotion Act was unanimously passed as a member bill.

**2006**  
29, Jun  The Tourism Nation Promotion Basic Plan was approved at a cabinet meeting.

**2007**  
18, Jan  Then Prime Minister Fukuda said in his policy speech, “Promoting tourism is the key to local vitalization and we will establish Japan Tourism Agency to strengthen the measures such as vigorously sending out information on regional culture and natural beauty and attracting more overseas and domestic visitors.”

**2008**  
25, Apr  “The law for partial revisions of the laws to establish the Ministry of Land, Infrastructure, Transportation and Tourism" regarding to the establishment of the Japan Tourism Agency was passed.

16, May  “The law for developing tourism zones to drive the visits and stays by tourists” was passed.

29, Sep  Then Prime Minister Aso said that one of the roles of the Japan Tourism Agency established as of 1, October is to vitalize local economy through tourism.

1, Oct  The Japan Tourism Agency established.

2, Oct  Then Prime Minister Aso made a mention at an Upper House assembly that the old objective of the government for 10 million visitors by 2010 is expanded to double the current level to 20 million by 2020 and the public and private sectors work together to build attractive tourist destinations to solicit overseas visitors.

**2009**  
13, Mar  Tourism Nation Promotion Strategic Council compiled a report “Realization of 20 million overseas visitors.”

23, Jun  The 2009 Basic Economic Policy was approved at a cabinet meeting. It includes mentions of “Realization of a world-class tourism nation (20 million overseas visitors by 2020)” and “Promotion of staggered holidays.”
The following are established for realizing a tourism nation:
1. the importance of being aware of “making a nation a
good place to live and a good place to visit” in order to
enrich the life of the people.
2. the importance of promoting people’s sightseeing trips.
3. the importance of having global points of view.
4. the importance of securing coordination among
concerned parties.

Establishing a tourism nation is positioned as “a key task
essential for economic development of the nation in the
21C” in view of of a declining birthrate and aging population
and full-fledged development of international exchanges.

To promote comprehensive and systematic measures for
establishment of a tourism nation and thus to contribute to
the economic development, lifestyle stability and
enhancement of global mutual understanding.

The title was revised from “Tourism Basic Act” to “Tourism
Nation Promotion Act” with the view of the positioning of a
tourism nation as a national strategy and the law aiming to
promote measures to realize its targets.

1. Central Government
Draw up and implement comprehensive
measures to realize a tourism nation.
2. Local governments
Draw up and implement measure taking
advantage of regional characteristics and
pursue broad-based cooperation.
3. People
Grasp the importance of promoting a tourism
nation and assume a positive role of
developing attractive tourist sites.
4. Tourism industry make efforts to realize a
tourism nation.

1. Basic policy to realize a tourism nation
2. Targets to realize a tourism nation
3. Measures for the government to implement
comprehensive and systematic measures
4. Draw up a tourism nation promotion basic plan
which includes all necessary issues to be approved
by a cabinet meeting. (The minister of MLIT is in
charge)
Outline of Tourism Nation Promotion Basic Plan

Based on the Article 10 of the Tourism Basic Act, the Tourism Nation Promotion Basic Plan was drawn up to promote measures in a comprehensive and systematic manner in order to realize a tourism nation. (Approved at a June, 2007 cabinet meeting)

**Basic Policy**
- Expand domestic travels of the Japanese and international visitors to Japan and develop Japanese tourists’ overseas travels, and others

**Goals**

- **International visitors to Japan**
  - 10 million by 2010 but target at the same number of overseas travelers from Japan in the future

- **Overseas travelers from Japan**
  - 20 million by 2010

- **Domestic travel spending**
  - ¥30 trillion by 2010

**Basic goals during the planned period**

- **Duration of domestic travels by Japanese**
  - 4 nights per year by 2010

- **International conferences in Japan**
  - More than 50% increase by 2011

**Duration**
- 5 years

**Measures**
Describe concrete measures to achieve the goals

**Other**
Conduct annual inspections and review in about 3 years and others
Number of International Visitors to Japan

Visit Japan Campaign launched

Jan thru Jul total 3,728K - 27.8% from 2008

Note: Estimates for June, 2009 and beyond
International Visitors to Japan by Region and Country

Total 8,350K visitors

- Korea 2,380K (28.5%) [6.8%]
- USA 770K (9.2%) [6.6%]
- China 1,000K (12.0%) [6.2%]
- Hong Kong 550K (6.6%) [7.3%]
- Other Asian countries 410K (4.9%) [7.1%]
- Other European countries 410K (4.9%) [7.1%]
- Oceania 280K (3.3%) [4.5%]
- Europe 890K (10.6%) [6.0%]
- North America 970K (11.8%) [4.9%]
- Other Asian countries 470K (5.6%) [0.5%]
- Singapore 170K (2.0%) [0.6%]
- Thailand 190K (2.3%) [4.6%]
- Canada 170K (2.0%) [0.4%]
- UK 210K (2.5%) [6.9%]

2008 priority markets total: 7.34 million visitors (87.9%)

Black Box: Priority Markets (FY2003 - )
Blue Box: Priority Markets (FY2004 - )
Red Box: Priority Markets (FY2005 - )
The number of overseas travelers from Japan was steadily growing until 2000. Then, negative factors such as 9/11 in 2001 and the SARS scare in 2003 occurred, and the number of visitors to Japan made a record drop.

There was a sign of recovery in 2004, and in 2006 the number rebounded to 17,295 thousand persons. However, there was a decrease in 2007 and 2008.

Source: an MLIT material based on Justice Ministry data
Domestic Travel Spending (2007)

¥23.5 trillion

Overseas trips by Japanese (spending within Japan) ¥1.8 trillion
Day trips ¥4.9 trillion (21.1%)

International visitors to Japan ¥1.5 trillion
Overnight Trips ¥15.3 trillion (65.1%)

Contribution to economy (economic effects)

Inducement to Production ¥53.1 trillion ... 5.6% of domestic production in the interindustry table
Inducement to Added Value ¥28.5 trillion ... 5.5% of nominal GDP
Inducement to Employment 4.41 million jobs ... 6.9% of workforce

Source: MLIT “2007 Research on the Economic Effects of the Travel and Tourism Industries”
Per Capita Trips and Nights of Domestic Overnight Trips in Japan

Source: MLIT “Travel and Tourism Consumption Trend Survey”
- Increase the number of international conferences held in Japan by more than 50% by 2011: 168 in 2011 to 252 in 2011.
- Japan was ranked 5th with 448, a major gain from last year’s 18th place with 166 in line with the relaxed UIA standard. The number would be 216 according to the criteria based on the target figures in Tourism Nation Promotion Basic Plan.
- Other Asian countries increased their numbers as well. Especially Singapore leaped ahead from the last year’s 10th place with 298 to the 4th place with 466 conferences.
Realizing a tourism nation is a national task essential for developing Japan’s economic society
- Tourism Nation Promotion Act enacted in December, 2006
- Tourism Nation Promotion Basic Plan approved at a cabinet meeting in June, 2007

Enhance global mutual understanding
Vitalize regional economy

This nation needs a framework for the public and private sectors working together to realize a tourism nation.

Japan Tourism Agency established at MLIT
to promote a tourism nation in a comprehensive and systematic manner

Japan Tourism Agency’s Role
- Support communities taking the initiative in developing attractive tourist sites
- Support the efforts to enhance the tourism industry’s global competitiveness
- Promote international tourism, e.g. boosting the number of overseas visitors to Japan
- Improve the environment for promoting sightseeing trips

Effects of the establishment of Japan Tourism Agency
- Enhanced capability to offer information overseas as a government representative
- Reinforced all-nation approach under the leadership of the Japan Tourism Agency commissioner eliminating sectionalism
- Provision of a one-stop window for tourism related issues to regional people
Visit Japan Campaign Activities

Send out information on how attractive tourist sites in Japan are and conduct the Visit Japan Campaign with the public and private sectors working together to support the effort to create appealing Japan tour products with an aim to increase the number of visitors to Japan to 10 million by 2010.

Priority Markets

12 countries/regions sending many visitors to Japan
Surveys conducted in emerging markets;
   India, Russia and Malaysia
(Initiated from 2009 surveys in the Philippines, Indonesia, Italy, Spain, Vietnam, Mexico and GCC countries)

Improve Recognition

Programs to offer information on the attractiveness of Japan’s tourism
- Invite overseas media and support their coverage
- Advertisements such as overseas TV commercials
- Send out information through Web sites
- Participate in overseas tourism expositions

Inviting Hong Kong media
(in Sendai in August, 2008)

Japan-France Tourism Exchange Year advertisement on bus (March, 2008)

Solicit Visitors

Support creation and sales of appealing Japan tour products and expand youth exchange programs
- Invite overseas travel agencies to Japan and hold business conferences
- Insert joint advertisements of Japan tour products
- Invite educational tours to Japan

Singapore educational tour to Japan seminar (Aug., 2008)

Large-scale business conferences
Yokoso Japan Travelmart (Oct ‘08)

* When the above programs are conducted with a local government/business, the government bears up to the half of the total expense. (Visit Japan Campaign Regional Coalition Program)
The Tourism Nation Promotion Strategic Council (Chairman Jiro Uchio, Chairman of Ushio, Inc.) recommended that The Japan Tourism Agency develop a medium- and long-term tourism nation strategy in cooperation with ministries concerned, especially one related to inbound tourism (a target of 20 million visitors by 2020). After deliberations by its working group, the council compiled a report “Realization of the age of 20 million overseas visitors to Japan.”

Visitors to Japan in the age of 20 million visitors

- About 1 out of 6 overnight tourists are international visitors (1 out of 14 in 2007)
- Ratio of international visitors’ spending to the total travel consumption
  5.8% in 2006 to 16.3% in 2020
to exceed USA’s current 14.3% and to close in on UK’s 18.1% and Germany’s 17.0%

- Estimated are ¥4.3 trillion travel consumption by overseas visitors to Japan and 390 thousand jobs created as a direct employment effect when the 20 million visitor target is realized.
- 2006 travel consumption: ¥1.4 trillion

To look into an overseas promotion strategy aiming at 20 million visitors and a measure for a comprehensive improvement of a reception environment in terms of software and hardware areas
Economic Effects in the age of 20 million Visitors

All Economic Effects on Japan

Overseas Visitors
20 million
(8.35 million in 2008)

Travel Consumption
¥4.3 trillion
(¥1.4 trillion in 2006)

Direct Employment Effect
390K jobs
(120K in 2006)

Overseas Visitors in 2020

Asia: 76%

Overseas Visitors in 2020

Europe
North America
Oceania
Latin America
Africa
Korea
Taiwan
China
 Others in Asia

20 million

Economic Effects on Local Areas

- The ratio of overseas visitors visiting three major metropolitan areas versus those visiting other local areas: 7 vs 3
- If half of the planned 20 million overseas visitors visit local areas, that will have a further impact on local economy
- Overseas visitors visits to local areas would create ¥1.6 trillion consumption, ¥2.0 trillion added value and 313 thousand jobs

All Economic Effects on Japan

Overseas Visitors
20 million
(8.35 million in 2008)

Travel Consumption
¥4.3 trillion
(¥1.4 trillion in 2006)

Direct Employment Effect
390K jobs
(120K in 2006)
Falling Population will accelerate especially in local areas

Decreasing local spending will lead to shrinking local economy

Fear of widening regional differences
Why Need to Build “Tourism Zones”

Tourism Zone strategy
- from scattered dots to linear alignment and to a space -

1. Geographical Stretch
- from hotels to towns
- from towns to environs

2. Temporal Stretch
- from daytrip to overnight trip
- from one overnight stay to multiple-night stay
- from seasonal to year-round

3. Interpersonal Stretch
- from just a guest to a big fan (repeater)
- from weekend residents to bi-regional residents

Need to take concrete steps based on the needs of tourists
< service quality improvement and branding at each zone >

- **Lodging**
  - Separation of board from bed, sending off tourists from hotel to town through, e.g., expansion of local consumption of local produce.
  - Enhance the hospitality level in the lodging area through, for example, the introduction of a common hot spring coupon.

- **Tourism Resources**
  - Enrich the lineup of hands-on, learning, interacting and dining activities (especially those during early morning and evening hours).
  - Put brands on tourism-related products by focusing focusing on their genuineness, background information, differentiating factors and unique features.

- **Transportation and Transfer**
  - Figure out way to transform the feeling of a burden (cost) of moving to that of a joy (benefit)
  - Enhance the ability to attract tourists by improving access and make a transfer within a zone easy.

- **Guidance, Information Provision and Marketing**
  - Enhance sightseeing suggestions to meet the needs and objectives of tourists.
  - Improve marketing capability through improving customer satisfaction and introducing a common reservation system and membership program.

To make it happen
Enhance coordination among the three

1. Tourism industry and other industries
2. Local businesses and a local government
3. One local area and another
Develop Tourism Zones to Extend Tourists’ Stay

Developing Tourism Zones

- Leverage Tourism Resources
  Develop tourism-related products leveraging attractive tourism resources

- Enhance Tourism Guidance and Information Provision
  - Introduce sightseeing suggestions
  - Improve information signs

- Enhance lineup of Hands-on, Interacting and Dining Activities
  - Hold early-morning and evening events
  - Develop distinctive local dishes

Central government’s major support items to initiatives coordinated between local areas

- Budgetary (aids to tourism zone development project costs) and Fiscal Investment and Loan steps
  Support regional efforts to improve accommodations, tourism resources, transportation and guidance information provision
  - Boost regional efforts to develop a tourism zone good for spending 3 days and 2 nights comfortably and improve tourists’ satisfaction level

- Coordination in the hardware side
  Give consideration to the efforts to coordinate a tourism zone development project with social capital improvement projects such as improving landscape and information signs
  - Enhance the comprehensive attractiveness of the whole tourism zone including items in the hardware side

- Exceptions to Vitalizing Rural Areas Act
  A Subsidy to support revitalizing rural area projects can be given to exchange facility building projects in rural areas in a tourism zone.
  - Enhance the lineup of programs for tourists to enjoy their stay such as hands-on and exchange activities in rural areas

- Exceptions to Travel Agency Law
  Exceptional measures applied to travel agents such as hotel and ryokan operators
  - Extend guests’ stay by making it possible for hotels and ryokan to sell long-stay tour products to their guests

Support Initiatives based on Tourists’ Needs

- Build globally competitive, attractive tourist sites
- Extend domestic and overseas tourists’ stay to more than that of 3 days and two nights
- Revitalization of regional economy

Provide Comfort in Transfer

- Introduce discount excursion tickets
- Plant trees on roadside

Enhance Farming and Fishing Hands-on Programs

- Provide facilities for hands-on and exchange activities
- Develop farming experience programs

Prepare Environment for Stroll

- Develop paths for cozy town stroll (coordination in the hardware side) and provide better guidance

Improve the Appeal of Accommodations

- Introduce separation of board from bed
- Introduce common hot spring coupons
- Promote hotels’ efforts to push local travel products their guests

Effects

Enhance Farming and Fishing Hands-on Programs

- Provide facilities for hands-on and exchange activities
- Develop farming experience programs

Long-stay Promotion Area

City B

Town C

Town D

Tour
Tourism Zones (30 zones)

- Shiretoko Tourism Zone (Shari, Rausu, Shibetsu and Nyosato in Hokkaido)
  - New Trips to Aomori; Towada Wide-are Tourism Zone (Aomori, Hachinohe, Towada, Misawa, Shichinohe, Rokunohe, Tohoku and Oirase in Aomori)
- Furano, Kami-Furano, Naka-Furano, Furano, Minami-Furano and Shimukappu in Hokkaido)
  - Toyama, Kurobe Valley, Ecchu-Niikawa Tourism Zone (Uozu, Namekawa, Kurobe, Nyuuzen and Asahi in Toyama)
  - Noto Peninsula Tourism Zone (Nanao, Wajima, Suzu, Hakui, Hodatsu-Shimizu, Naka-Noto, Anamizu and Noto in Ishikawa)
  - Fukuoka, Sakai Wide-area Tourism Zone (Fukuoka, Awara, Sakai and Ehimeji in Fukuoka)
  - Date Wide-area Tourism Zone (Sendai, Kesennuma, Tome, Osaki, Matsushima, Rifu and Minami-Sankoku in Miyagi; Ishino, Oshu and Hiraizumi in Iwate)
  - Aizu-Wakamatsu, Kitakata, Shimogo and Minami-Aizu in Fukushima
  - Noto Peninsula Tourism Zone (Nanao, Wajima, Suzu, Hakui, Hodatsu-Shimizu, Naka-Noto, Anamizu and Noto in Ishikawa)
  - Mt. Fuji, Fuji Five Lakes Tourism Zone (Fuji-Yoshida, Nishi-Katsura, Yamanakako, Oshino, Fuji-Kawaguchiko and Narusawa in Yamanashi)
  - Lake Biwa, Omi Path Tourism Zone (Hikone, Nagahama, Higashi-Omi, Maibara, Azuchi, Hino, Ryuo, Aishi, Toyosato, Kora, Taga, Torahime, Kohoku, Takatsuki, Kinomoto, Yogo and Nishi-Asai in Shiga)
  - Shimanto, Ashizuri (Hata area) Tourism Zone (Shimanto, Sukumo, Tosa-Shimizu, Kuroshio, Otsuki and Mihara in Kochi)
  - Healing and Refreshing Holy Land; Kumano Tourism Zone (Tanabe in Wakayama and Totsukawa in Nara)
  - Unzen, Amakusa Tourism Zone (Shimabara, Unzen and Minami-Imabuse in Nagasaki; Amakusa, Kami-Amakusa and Reihoku in Kumamoto)
  - Kita-Chugoku and Nishi-Aizu in Fukushima
  - Tohoku and Oirase in Aomori)
  - Hidaka, Tokachi Tourism Zone (Hidaka, Tokachi, Chitose, Eniwa, Kitahiroshima, Kita, Toho and Tosu in Hokkaido)
  - Niigata
  - Sapporo, Ebetsu, Chitose, Eniwa, Kitahiroshima, Ishikari, Tobetsu and Shinshirotsu in Hokkaido)
  - Yatsugatake, Shinshirotsu in Nagano)
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  - Minami-Boso Regional Tourism Zone (Tateyama, Kamogawa, Minami-Bozo and Kyonan in Chiba)
  - Aso, Kiyu Tourism Zone (Aso, Minami-Oguni, Oguni, Ubayama, Takamori, Minami-Aso, Nishihara and Yamato in Kumamoto; Takeda in Oita)
  - Nishi Awa Tourism Zone (Miyoshi, Tsurugi and Higashi-Miyoshi in Tokushima)
  - Lake Biwa, Omi Path Tourism Zone (Hikone, Nagahama, Higashi-Omi, Maibara, Azuchi, Hino, Ryuo, Aishi, Toyosato, Kora, Taga, Torahime, Kohoku, Takatsuki, Kinomoto, Yogo and Nishi-Asai in Shiga)
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