

【調査報告】

An Analysis of Economic and Employment Effects on Okinawa Prefecture Brought about by the Rapidly Increasing East Asian Inbound Tourism during the 2010s

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2010年代に急増している東アジア系入域観光客が沖縄県の経済と雇用に及ぼしている影響についての一考察

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Introduction

The number of foreign inbound tourists visiting Japan has consistently been increasing during the 2010s. Thanks to a continuing weaker yen, the recent expansion of airline and shipping routes between major Japanese and East Asian cities, and an active tourism policy employed by the Japanese Government to attract more foreign visitors, including the relaxation of tourist visa conditions for foreigners, the number of foreign visitors to Japan reached 30 million for the first time in 2018. This phenomenon is clearly shown in Okinawa, the prefecture containing the southernmost islands of Japan. The total number of foreign inbound tourists to Okinawa was 9.39 million in 2017. This number surpassed, for the first time, 9.38 million foreign tourists visiting Hawaii, one of the world's most famous tourist destinations, in the same year. In recent years, students at Meio University have been able to easily recognize the rapidly increasing number of foreign visitors in our daily lives in Okinawa. For example, while working at convenience and other stores, at restaurants, and at various tourist facilities, the students provide service to foreign visitors far more frequently than before.

The question arises as to what kind of effects the significantly increased number of foreign inbound tourists have had on the Okinawan economy over the last decade? This paper statistically examines the economic and employment effects on Okinawa

prefecture brought about by the rapidly increasing number of East Asian inbound tourists during the 2010s, with particular focus on the impacts on the transportation and accommodation industries, two of the main tourism industries. The paper argues that the rapidly increasing number of East Asian inbound tourists has largely helped to promote Okinawa's economic development and to create new employment opportunities for Okinawan people during the 2010s. More particularly, it has largely helped to develop the transportation industries such as aviation, shipping and car-rental services, as well as to develop the accommodation industry, including hotels, *ryokans*, and *Minpaku* (or bed and breakfast style accommodations). As a result, Okinawa's tourism industries in general and accommodation industry in particular have been facing a serious problem of labor shortages as labor supplies have consistently failed to meet the demands over the last decade.

In order to analyze the economic and employment effects brought about by the rapidly increasing number of East Asian inbound tourists systematically, the paper's primary source materials come from official documents and data, which are produced and published mainly by the Okinawa prefectural government. It also uses books, journal articles, newspapers and also web materials as secondary source materials. Moreover, during our research, we conducted several interviews with officials of the Okinawa prefectural government as well as with officials of Motobu City. These interview materials,

together with various secondary materials, are used as valuable evidence that supports main arguments throughout this paper.

This paper is divided into four sections. The first section statistically analyzes effects of the rapidly increasing number of East Asian inbound tourists during the 2010s on the economic conditions of Okinawa prefecture, with particular focus on figures relating to “spending by foreign tourists” and “employment effects.” The second section examines the effects brought about by the increased number of foreign visitors on the “aviation industry” and the “shipping industry.” Then, the third section looks at the effects on the “accommodation industry” with particular focus on statistics regarding “the number of stays,” “the number of accommodation facilities,” and “employment situation in the industry.” The fourth section looks at the future prospective of tourism in the *Yanbaru* region, where Meio University is located, by examining the impacts of Okinawa’s current tourism boom on promotion of the region’s economic development by examining the two ongoing tourism related projects in the region - that is, “the Motobu port cruise liner hub project” and “the UNESCO World Natural Heritage registration project of the *Yanbaru* region.”

I : An Analysis of Overall Economic and Employment Effects

This section looks at overall economic and employment effects which the increased numbers of foreign tourists have brought about for Okinawa in the 2010s. It mainly analyzes changes in the “number of foreign tourists visiting Okinawa” and “the amount of tourism revenue” during this period. Then, the overall economic and employment effects that the tourism boom in the 2010s has had on Okinawa Prefecture are also evaluated at the end of this section.

1. The Number of Foreign Tourists

At first, based on official data from the Okinawa prefecture, we analyze the change in the number of foreign tourists who visited Okinawa between 2010 and 2017.

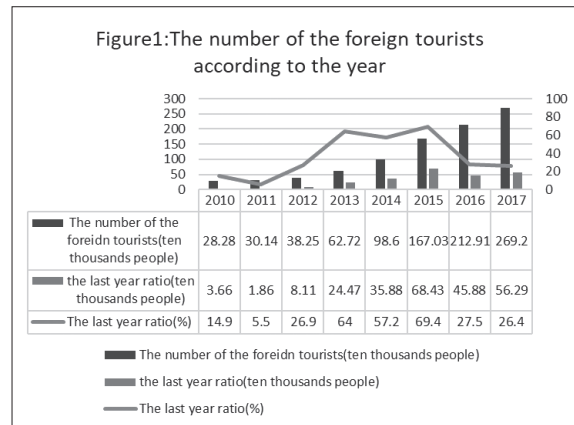


Figure 1 : The number of foreign tourists according to the year

Source: Okinawa prefecture, culture tourism sport division, sightseeing policy section, The entry into a zone tourist statistics general condition in 2018, Okinawa prefecture, March 2019

As shown in Figure 1, the number of foreign tourists who visited Okinawa increased between 2010 and 2017. The number of foreign tourists was 282,800 people in 2010 and 2,692,000 people in 2017. From this data, we understand that the number of foreign tourists increased about 9.5 times in seven years. Specifically, the rate of increase was remarkable from 2014 through 2015, showing growth at around 70% from the previous year. Approximately 2,900,000 foreign tourists visited in 2018¹, and it seems to be just a matter of time before that number will surpass 3 million people. According to an investigation by the Bank of Okinawa, the number of foreign tourists will surpass 10 million people in 2019². One of the factors in this explosive increase in recent years is the increase in the demand to visit Japan because of the continuing weak yen.

To accommodate the Japan travel demand, airlines which are located in the East Asia area such as Asiana Airlines, Jin Air, Korean Air Lines, T’way Airlines, China Airlines, Tiger Aviation, Cathay Pacific, China Eastern Airlines, Jetstar Asia Airlines, and Peach Aviation, are increasing their number of flights and establishing new routes between Naha and major cities of East Asia. Such factors have promoted the sudden increase in the number foreign tourists to Okinawa³. As a result, the number of foreign tourists to Okinawa has increased remarkably by about 2,400,000 people between 2010 and 2017, and this tendency continues now.

Next, we can analyze the national origin of foreign tourists in Okinawa. Figure 2 expresses a ratio and the number of people according to nationality of the foreign tourists in 2010 and 2017.



Figure 2 : The number of foreign tourists according to the year

Source: Okinawa prefecture, culture tourism sport division, sightseeing policy section, The entry into a zone tourist statistics general condition in 2018, Okinawa prefecture, March 2019

From figure 2, it can be seen that the foreign tourists visiting Okinawa from Taiwan shows a high ratio in both 2010 and 2017. There are several reasons for the consistently high number of tourists from Taiwan: (1) geographical proximity of Taiwan and Okinawa; (2) security coming from the similarity of the cultures; (3) low travel expenses; and (4) a good evaluation of the hospitality of the citizens of Okinawa⁴.

Further, we can read from Figure 2 that the number of foreign tourists visiting Okinawa from Korea and the Chinese mainland increased in both ratio and quantity. For example, the number of Korean tourists increased from 7.0 % (18,500) in 2010 to 20.2 % (54,600) in 2017, and the number of Chinese tourists increased from 8.0 % (23,800) in 2010 to 20.3% (544,800) in 2017⁵. This large increase in the number of tourists corresponded with the expansion of the Korean airline T'way Airlines⁶. Also, the increase in the number of Chinese tourists corresponded with the expansion of China Eastern Airlines and an increase in number of times of the Chinese cruise ships called at port in Okinawa⁷.

It should be pointed out that among the total number of tourists to Okinawa in 2017, the ratio of tourists from Taiwan, China, Korea, Hong Kong is higher than 80% . When the tourists from Thailand,

Singapore, Malaysia is included in the category of “others” in figure 2, the ratio of the foreign tourists becomes higher⁸. In sum, the sudden increase in the number of tourists from East Asia and Southeast Asia becomes a driving force behind the Okinawa sightseeing boom of the 2010s.

2. The Amount of Tourism Revenue

Next, to analyze the increasing effect of foreign tourists on the Okinawa economy, we can look in detail at “Tourism income” (Figure 3) and “Consumption per tourist” (Figure 4). We can see that the amount of sightseeing income increased by about times in 7 years. During the same period, consumption per tourist increased and decreased⁹. But, after 2014, spending stabilized at around ¥70,000 (\$756.0).

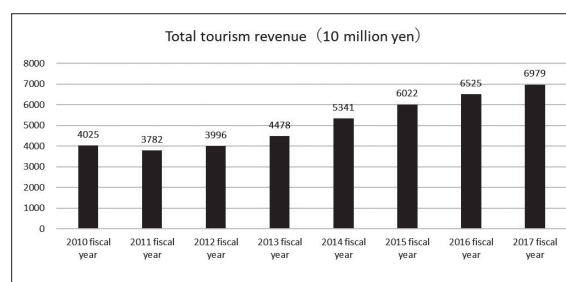


Figure 3 : Total tourism revenue

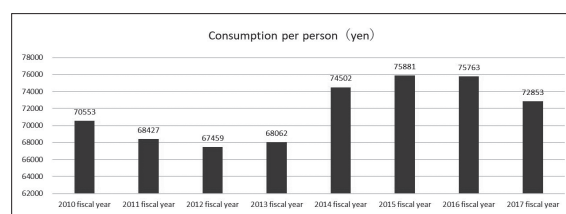


Figure 4 : Consumption per person

Table 1 : Offtake of the tourist, 2010-2017

fiscal year	2010 fiscal year	2011 fiscal year	2012 fiscal year	2013 fiscal year	2014 fiscal year	2015 fiscal year	2016 fiscal year	2017 fiscal year
Consumption person (yen)	70553	68427	67459	68062	74502	75881	75763	72853
Total tourism revenue (10million yen)	4025	3782	3996	4478	5341	6022	6525	6979

Source: Okinawa-ken bunka kanko supoutsu-bu kanko seisaku-ka, “Heisei22~29-nendo kanko shunyu ni tsuite”, Okinawa-ken, 2011~2018

Next, we consider foreign tourist consumption trends in Okinawa. Figure 5 shows the “Consumption per person” and Figure 6 shows the “Total Consumption.” List 2 shows the “Offtake per foreign tourist”¹⁰. The total consumption of foreign tourist

increases 8.8 times, from ¥22,756 million (\$228 million) in 2012 to ¥200,037 million (\$216 million) in 2017. During the same period, offtakes per foreign tourist increased by about ¥23,000 (\$248.4), from ¥59,493 (\$642.0) in 2012 to ¥82,625 (\$892.3) in 2015. But, this amount decreased by ¥8,300 (\$89.64) in 2017, compared to 2015¹¹. This reason is that the number of high income people visiting from Hong Kong decreased temporarily.

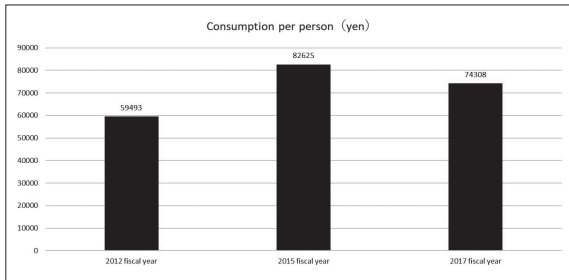


Figure 5 : Consumption per person

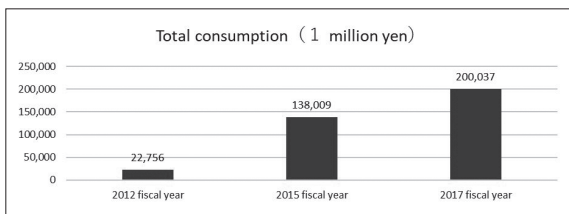


Figure 6 : Total consumption

Table 2 : Off take of the tourist

fiscal year	2012 fiscal year	2015 fiscal year	2017 fiscal year
Consumption per person (yen)	59,493	82,625	74,308
Total consumption (1 million yen)	22,756	138,009	200,037

Source: Okinawa-ken kankou supoutsu-bu kanko seisakuka, “Heisei24~29-nendo Okinawa ni okeru ryokou, kanko no keizaihakyukoka”, Okinawa-ken, 2013-2018

Foreign tourist who visit Okinawa have high levels of consumption compared to tourists who visit from Mainland Japan. For example, in data from 2014 to 2016, consumption per Japanese tourist average was ¥70,000 (\$756.0). But, the consumption per foreign tourist average was ¥100,000 (\$1,080.0)¹². One of the reasons is an increase in sightseeing without a tour group, or free plan sightseeing. For example, the number of individual or single family tourists from Taiwan to Okinawa has increased, in part because a traveler’s diary became a bestseller in Taiwan¹³. Each foreign tourist surpasses the average consumption per person compared to tourists from

Mainland Japan, which contributes to develop and promote tourism industry in Okinawa.

3. Overall Economic and Employment Effects

Well, what kind of effects are causing concretely toward economics and employment in Okinawa by the rapidly increasing east Asian inbound tourist on Okinawa. The 3rd table shows the economic ripple effects made by tourism in Okinawa. Economic ripple effect means the total amount of money, including the “direct effect,” the “primary indirect ripple effect,” and the “second-order indirect ripple effect.” “The direct effect” is money left in the prefecture tourism industry consumed by tourists. The “primary indirect ripple effect” is an increase in industrial sales related with the tourism industry. The “second-order indirect ripple effect” is the production increase of the other prefecture industries by the activation of consumption caused by a gain in income from employment¹⁴.

Table 3 : Economic ripple effect by tourism in Okinawa prefecture, 2012-2017

Year	2012	2015	2017
Direct effect (¥ billion)	401.5	608.2	691.2
Primary indirect ripple effect (¥ billion)	181.8	271.7	314.4
Second-order indirect effect (¥ billion)	93.4	145.0	164.4
Number of Employees	81,041	127,107	142,734

Source : Okinawa-ken bunka kanko supoutsu-bu kankouseisakuka, (Department of culture, Tourism and Sports, Okinawa Prefecture) “Okinawa-kenniokeru Ryokou・Kankouno Keizai Hakyuu Kouka [Suikai Kekka]” Okinawa-ken 2013-2018 [This table is created by the author referencing to this date]

First, we will analyze the “direct effect,” the “primary indirect ripple effect,” and the “second-order indirect ripple effect.” From the analysis, we can see that all of them are increasing. Obviously, in the 3rd graph the direct effect increased about 1.7 times from ¥401.5 billion (\$4.3 billion) in 2012 to ¥691.2 billion (\$7.5 billion) in 2017. As for the primary indirect ripple effect, it increased about 1.7 times from ¥181.8 billion (\$2.0 billion) in 2012 to ¥314.4 billion (\$3.4 billion) in 2017. As for the second-order indirect ripple effect, it increased about 1.8 times from ¥93.4 billion (\$1billion) to ¥164.4 billion (\$1.8billion) during the same term¹⁵.

Next, we will analyze the influence on the employment effect with an increase in the economic ripple effect. The employment effect is the employment created by the “direct effect,” the “primary indirect ripple effect” and the “second-order indirect ripple effect.” Employment shows a huge increase from 81,041 people in 2012 to 142,734 people in 2017, which is about 1.8 times. This is because the construction of accommodations in the prefecture has increased and the number of hotels or inns were increased, which results in an increase in the number of employees who are working there.

Economic ripple effects also have improved the high chronic rate of losing jobs in Okinawa and the employment expansion influenced by the increase of strong tourism demand other than accommodation¹⁶. This point will be discussed later in Section 3.

From the analysis above, we can see that the tourism boom in 2010 in Okinawa supported by the rapid increase of foreign entry tourists has been giving quite positive influences to the development of the whole prefectural economics.

II : Effects on the Aviation and Shipping Industries

The previous section looked at the overall effects that the dramatically increased number of foreign tourists over the last decade has brought about on Okinawa’s overall economy and employment condition. This section analyzes in detail what kind of impacts it had on both the aviation and shipping industries. It also describes the future challenges that these industries will face in order to advance their benefits further in the coming years.

1. Effects on the Aviation Industry and Forthcoming Challenges

First of all, about aviation, tourists from East Asia who arrive Okinawa by air still account for a high percentage of all travelers. In addition, this number will continue to increase, and is expected to contribute significantly to traffic revenue in Okinawa.

Naha Airport, which is Okinawa’s main airport, is currently ranked sixth in Japan in terms of the number of passengers at airports¹⁷. Figure 7

and Table 4 show the transition of the number of passengers at Naha International Airport during the period from 2010 to 2017.

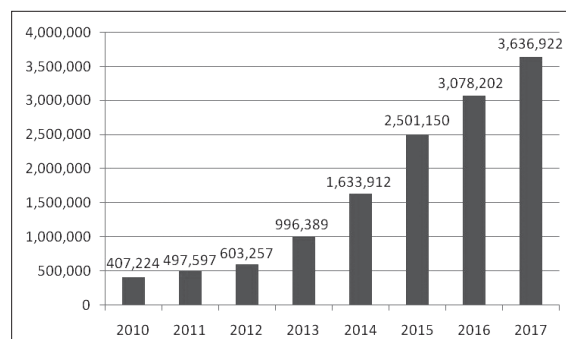


Figure 7 : Number of passengers by year at Naha International Airport 2010-2017

Table 4 : Number of passengers by year to Naha International Airport 2010-2017

Year	2010	2011	2012	2013	2014	2015	2016	2017
People	407,224	497,597	603,257	996,389	1,633,912	2,501,150	3,078,202	3,636,922
growth rates compared with last year	134%	122%	121%	165%	164%	153%	123%	118%

Source : Naikaku-fu Okinawa sougou jimukyoku kaihatsumensetsu-bu “Joukoukyakusuu no suii” Naikaku-fu, 2018.

Figure 7 and Table 4 indicate that the number of passengers at Naha International Airport increased from 407,224 people in 2010 to 3,636,922 people in 2017, an increase of 8.7 times. Table 4, growth rates compared with the previous year, shows that the average growth rate in 2010-2017 is 37.5 % , and the number of passengers at Naha International Airport has consistently increased at a high growth rate.

As mentioned in Section 1, over 80 % of the foreign tourists who visited Okinawa in 2017 are from Taiwan, Hong Kong, China and Korea, and foreign tourists by air route are from East Asia.

Next, Figure 8 shows the transition of the number of landings at Naha International Airport during the period from 2010 to 2017. This data indicates that the number of landings at Naha International Airport increased from 3,427 times in 2010 to 11,889 times in 2017, approximately 3.5 times.

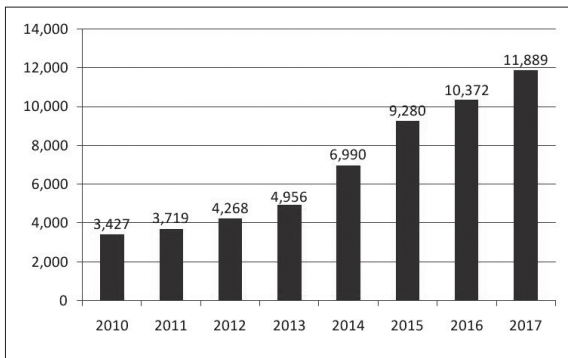


Figure 8 : Number of landings by year to Naha International Airport 2010-2017

Source : Naikaku-fu Okinawa sougou jim-u-kyoku kaihatsumensetsu-bu “Joukoukyakusuu no suii” Naikaku-fu, 2018.

Furthermore, Figure 9 and Table 6 show the number of experiences of travel in Okinawa by air route by nationality. These data indicate that the percentage of tourists visiting Okinawa for the first time out of all foreign tourists visiting Okinawa by air route was 80% . In addition, among tourists from Hong Kong and Taiwan, the repeater rates are 34.4% and 26.3 % , which is higher than those from other regions. From the fact that they often visit Okinawa for sightseeing, it can be said that tourists from Hong Kong and Taiwan have a particularly large economic contribution to Okinawa¹⁸.

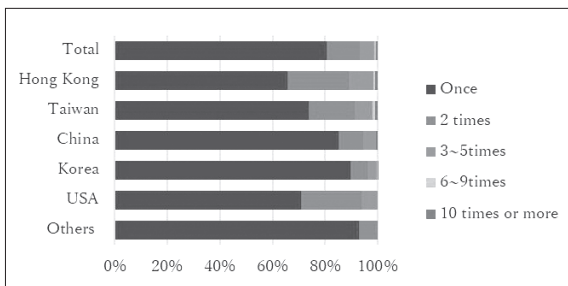


Figure 9 : Experience by nationality of Okinawa travel by air route, 2017

Table 5: Experience by nationality of Okinawa travel by air route, 2017

	Total	Hong Kong	Taiwan	China	Korea	USA	Others
Once	80.6	65.6	73.7	85.1	89.7	71.5	92.9
2 times	12.8	23.2	17.5	9.4	6.5	23.4	7.1
3 ~ 5 times	5.5	9.4	6.8	4.8	3.4	6.2	0
6 ~ 9 times	0.5	0.9	1	0	0.2	0	0
10 times or more	0.7	0.9	1	0.7	0.2	0	0

Source: Okinawa-ken bunka kanko supoutsu-bu Kankosinkou-ka, “Heisei 29-nendo gaikokujin kankokyaku zittai tyosa gaiyuu houkoku”, Okinawa-ken, 2018

Figure 10, Table 7 and Table 8 show the number of nights stayed by foreign tourists visiting Okinawa by air route according to nationality. As can be read from these data, foreign tourists arriving by air route stayed 3 to 4 nights, the majority of which accounted for about 66% of the total, and the opportunity and time for consumption activities increased accordingly. In other words, foreign tourists who visit Okinawa using an aircraft tend to spend a relatively long time (in addition to air fares), so tourism revenue is expected on many occasions: accommodation, food, purchases of souvenirs, expenses for sightseeing, etc.

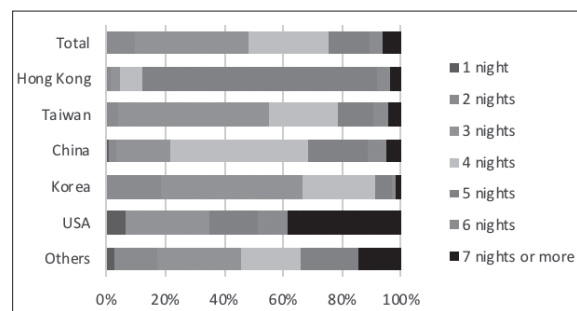


Figure 10 : Number of nights stayed by foreign tourists visiting Okinawa by air route, by nationality, 2017

Table 6 : Number of nights stayed by foreign tourists visiting Okinawa by air route, by nationality, 2017

	Total	Hong Kong	Taiwan	China	Korea	USA	Others
1 night	0.4	0.2	0.2	0.6	0.2	6.2	2.5
2 nights	9	4.4	3.6	2.9	18.5	0	14.5
3 nights	38.7	11.3	51.3	18	48	28.7	28.5
4 nights	27.4	27.8	23.5	47	24.6	0	20.1
5 nights	13.6	278	11.9	20	5.6	16.2	19.9
6 nights	4.9	14.3	4.9	6.4	1.3	10.2	0
7 nights or more	6	14.2	4.7	5.2	1.9	38.7	14.5

Table 7 : Number of nights stayed by foreign tourists visiting Okinawa by air, by nationality, 2017

Total	Hong Kong	Taiwan	China	Korea	USA	Others
3.95	4.86	3.96	4.25	303	6.83	4.23

Source : Okinawa-ken bunka kanko supoutsu-bu Kankosinkou-ka, “Heisei 29-nendo gaikokujin kankokyaku zittai tyosa gaiyuu houkoku”, Okinawa-ken, 2018

As mentioned above, the number of tourists arriving in Okinawa by air route has continued to increase rapidly. Although, Okinawa has a task: the lack of capacity at Naha Airport. In other words, Naha Airport is not large enough to cope with the increasing numbers since the number of departures and arrivals has increased rapidly. This fact is a problem for attracting foreign tourists.

An expansion project of a second runway at Naha Airport is currently being implemented to solve this problem¹⁹. Construction on the second runway was begun in 2014, with the aim of starting operations from 2020. The total cost of the project is ¥199.3 billion (\$1,845 million). The runway length is 2,700 meters and the runway width is 60 meters, and it takes about 160 hectares of reclamation work in a position 1,310 meters offshore from the current runway. When the second runway is completed, the number of aircraft arrivals and departures at Naha Airport is expected to increase to 50,000 times a year²⁰. Along with this, the number of tourists from East Asia will increase significantly in the future, and it is expected that they will contribute significantly to the transportation revenue of Okinawa.

2. Effects on the Shipping Industry and Forthcoming Challenges

Tourists who come to Okinawa by sea from East Asia also contribute to the economic development of Okinawa. In Okinawa, Naha Port is now the main port, and it is the second largest port of call after Hakata Port in Japan²¹. In fiscal year 2018, 243 cruise ships, the highest number ever, sailed to Okinawa²². As is clear from Figure 11, Taiwan has the highest percentage of foreign tourists visiting Okinawa by sea, accounting for 45% of the total in May 2019. The second largest percentage of foreign tourists is 37% from China, with cruise ship tourists from Taiwan and China accounting for more than 80% of the total²³.

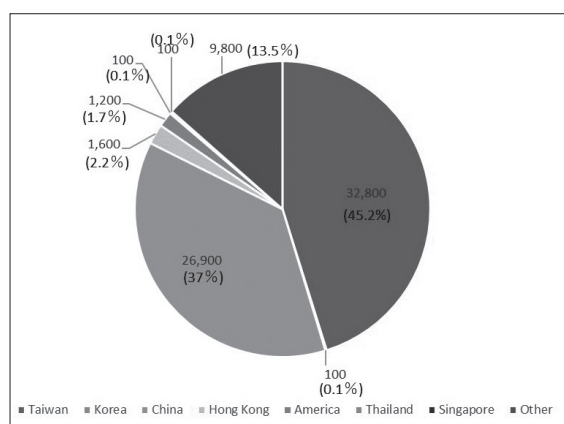


Figure 11 : Entry by Nationality by Sea Route to Okinawa Prefecture, May 2019

Source: Okinawa-ken bunka kanko supoutsu-bu kankoseisaku-ka kankobunka kikaki-han "Reiwagannen (2019) 5gatsu nyuukikankokyakusuu gaikyo" Okinawa-ken, 2019.

While attracting tourists on cruise ships has the advantage of bringing in large numbers of foreign tourists at once, it turns out that there are some issues associated with it. The first issue is that the shortage of employees who drive buses and taxis is becoming more serious, so it is necessary to enhance the traffic since large numbers of tourists came to Okinawa²⁴. There are no trains in Okinawa Prefecture, and the only means of transportation after entering the area is limited to buses, taxis, rental cars, or a monorail service that runs only around Naha City. As a result, the shortage of bus and taxi drivers is becoming more serious; in response, the taxi company Dai-ichi Koutsu and bus companies in Hokkaido are sending drivers to each other during their respective off-seasons. However, the current situation of such a shortage of human resources could be a catalyst for the revitalization of the region if we change perspectives. As we try to take measures to make up for the shortage of human resources, we can expect new jobs to be created and Okinawa's society to become more active.

The second problem brought by the increase in the number of tourists entering the area by sea route is that the economic effect brought about is small compared with sightseeing from the air. As described above, in the case of tourism arriving by air route, accommodation costs, food, and souvenir purchase costs, tourism income in many situations can be expected. However, according to the staff of

the Planning, Commerce and Tourism section of the Motobu Town Hall where the author interviewed,

“In the case of foreign tourists who come by cruise ship, usually the amount of time spent at port is six to eight hours”²⁵. Shopping at commercial facilities around the port and eating at restaurants are the main attractions, and if they have enough time, they can visit tourist facilities near the port²⁶.

In fact, the per capita consumption unit per tourist from the sea route is as shown in Figure 12 and Table 8 below. The souvenir shopping expense is still the highest, and the next highest is food and beverage expenses, and the lowest is entertainment admission expenses. In the case of overnight cruises, tourists stay on board the cruise, so the economic effect on accommodations in Okinawa cannot be expected. On this issue, the English-language newspaper The Japan Times said, “Other goals include making Okinawa a so-called turnaround port, which involves cruise ships sailing from and coming back later to the prefecture, instead of just being a waypoint, and thereby increasing the amount of time and money tourists spend during their stays”²⁷.

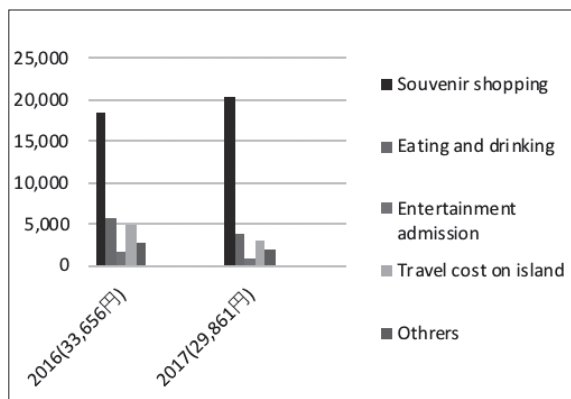


Figure 12 : Per-capita consumption of foreigners who came to Okinawa, 2016-2017

Table 8 : Per-capita consumption of foreigners who came to Okinawa, 2016-2017

Cost name	2016 (33,656 yen)	2017 (29,861 yen)
Souvenir shopping	18,311	20,220
Eating and drinking	5,728	3,764
Entertainment admission	1,692	956
Travel cost on island	5,018	3,057
Other	2,852	1,864

Source: Okinawa-ken bunka kanko supotsu-bu kankoseisaku-ka “Heisei 29 nendo Gaikokujin Kankoukyaku zittai Chousa Gaiyo Hokoku” Okinawa-ken, 2018.

As a solution to these issues, the Naha Port Management Association decided to introduce a system to collect facility fees for cruise ship passengers. According to the Asahi Shimbun, “The Naha Port Management Association proposed a proposal for an amendment to the ordinance that would collect facility fees of 280 yen from each passenger of a cruise ship that stops at the Naha Cruise Terminal in Wakasa, Naha City, at a regular meeting of the Association Council, which opened on August 14. The union said it would be the first in the country to collect royalties from cruise ship passengers. Based on the current situation in which reservations for port calls have been available for about two years, it is scheduled to come into effect from January 1, 2020”²⁸. It turns out that they are considering using the facility fee from the cruise ship. After that, the introduction of this system was formally decided²⁹.

Okinawa prefecture has set up the so-called “Cruise Liner Hub Initiative” in order to continue to focus on attracting tourists from East Asia by cruise ships. The goal of the “Cruise Liner Hub Initiative” is to make the most of Okinawa’s attractiveness as a cruise destination, such as the growing geographical advantage of Okinawa due to the expanding Chinese cruise market to the south, as well as its extensive domestic and international air routes and nearby airport and port infrastructure. The plan is to establish a position as the number one cruise area in East Asia in the future³⁰. As is clear from Figure 13, the main purpose of this initiative is to make Okinawa the center of the cruise network (hub port) throughout East Asia. The English-language newspaper The Japan Times said, “The last stage of the road map, covering a period from 2021 onward, will focus on pulling in investment from cruise lines and other enterprises in the private sector, and preparing for the goal of constructing a resort complex that houses a cruise terminal, a hotel and shops,” and reports on the idea of making Okinawa one of the largest resorts in East Asia³¹.



Figure 13 : Cruise Liner Hub Initiative

Source : Okinawa-ken bunka kanko supoutsu-bu kankoseisaku-ka “Toyo no karibu kousu”

Although there are some issues, foreign tourists from air and sea routes (especially from East Asia) are still on the rise, so it is likely to continue to have a very large economic effect for Okinawa Prefecture.

III : Effects on the Accommodation Industries

The previous section analyzed the effects brought about on the aviation and shipping industries by the dramatically increased East Asian inbound tourism. This section clarifies impacts on the accommodation industry by investigating changes in “the number of stays for foreign tourists visiting Okinawa” and “the number of accommodations in Okinawa” and “the number of employees in the accommodation industry in Okinawa” during the 2010s. Furthermore, the section looks at an issue of the labor shortage in the industry as well as the possibility of the so-called *Minpaku*, or bed and breakfast style casual accommodations, as a driving force in the further development of the industry in the near future.

1. Number of Stays for Foreign Tourists Visiting Okinawa

First, we will focus on the number of foreign tourists. It’s changing to a number of foreign tourists who is visiting in Okinawa from Japan or other countries. Figure 14 shows that the total accommodation industry (the number of people who visited Okinawa from Japan and other countries) peaked at a little over 20 million in 2013. After this, the number of Japanese tourists flattened out, but the number of foreign tourists continued to increase every year. It increased ten times from 442,260 in 2010 to 4,603,720 in 2017. In addition, the number of people who stayed in Okinawa increased from 3.5 % in 2010 to 21.8 % in 2017. It increased 18.3 % over 10 years. Furthermore, Okinawa is ranked No.5 for foreign tourists who visited in Japan³². Thus, foreign tourists are increasing year by year. This shows that the number of foreign tourists who come from East Asia is rapidly increasing.

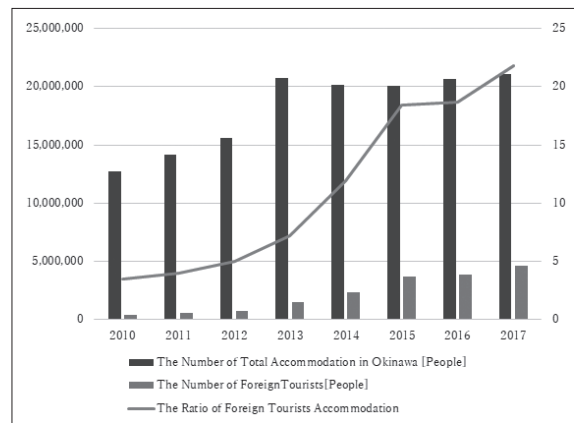


Figure 14 :The Transition of Foreign Tourists and Accommodation Numbers in Okinawa

Source: Kokudo Koutsuu-Shou Kankou-chou (Ministry of Land, Infrastructure, Transport and Tourism-Japan Tourism Agency) “syukuhaku-ryokou-toukeichousa” 2010-2017 [Based on this material, the author created graphs and tables.]

2. The Number of Accommodations in Okinawa

This section focuses on increasing accommodation facilities for foreign tourists who visit in Okinawa. The data is statistics about accommodation facilities, or the number of rooms and capacity in 2011-2017. This data shows that the number of accommodation facilities is increasing every year. The cause is

tourists who come to Japan and other countries. Actually, the number of accommodation facilities increased from 1,357 units in 2011 to 2,082 units in 2017. In total, an increase of 725 units. Furthermore, the number of rooms increased from 38,152 to 46,068: an increase of 7,916 rooms. The capacity is 96,954 people, which is an increase of about 24,449 people over 7 years.

Table 9 : Accommodation Facilities, Number of Rooms and Capacities of Okinawa Prefecture in 2011-2017

Year	2011	2012	2013	2014	2015	2016	2017
Accommodation Facilities	1,357	1,411	1,441	1,541	1,664	1,823	2,083
Number of rooms	38,152	38,891	38,905	40,243	41,037	42,695	46,068
Capacity[people]	96,954	99,061	101,111	104,724	107,190	111,982	121,403

Source : Okinawa-Ken Bunka Kankou Suports-bu Kankouseisaku-ka [Department of Culture Tourism and Sports, Okinawa Prefecture] “syukuhakusisetsu-jittaichousa-kekka” Okinawa Prefecture, 2011-2017. [Based on this material, the author created graphs and tables.]

One cause of the increase in the number of accommodation facilities is the opening of the new Ishigaki airport in 2013³³. Though previously airlines only went to the Okinawa mainland, after 2013, they were also able to bring travelers to Ishigaki Island. Therefore, accommodation facilities have been being built not only on the Okinawa mainland but also Ishigaki Island and other outer islands. Second, from 2013, obtaining a travel visa became easier for people from Southeast Asia. For this reason, after 2015, foreign tourists came not only from China, Taiwan and South Korea; Southeast Asian people began to visit Okinawa, causing a rush of construction in the 2010s³⁴.

In sum, an increase in the number of foreign tourists brings higher accommodation demands in Okinawa prefecture and a rush of accommodation facilities construction. Interestingly, in 2017, Taiwan and South Korea tourists’ average nightly hotel room fee is about ¥25,000 (\$231). On the other hand, Hong Kong and China tourists; average is about ¥36,000 (\$333)³⁵. This average suggests that Hong Kong and Chinese people tends to use more expensive hotels than other foreign tourists. This suggests certain strategies that the accommodation industry can use to increase revenue.

3. The Number of Employees in the Accommodation Industry

This section examines the employment situation in the accommodation industry following the increase in the number of foreign tourists who visit Okinawa. Table 10 and Figure 15 show the transition of regular workers in the accommodation industry in Okinawa. The number of regular workers in the accommodation industry in Okinawa in 2010 was 9,799 but that number increased to 12,327 in 2017. The number of regular workers increased by about 2,500 from 2010 to 2017³⁶. Also, as we can see from Figure 15, the number of employees who work as regular or part time has been increasing in the same period. In detail, during this period, the number of regular workers increased by 2,192 and part-time workers by 336. Compared to part-time workers, the employment increase for regular workers is remarkable. One of the reasons that the number of regular workers increased from 2013 to 2014 is that the number of foreign tourists who visited in Okinawa increased by one hundred thousand compared to the previous year at that time. Therefore, the increased number brought more tourist income and it connected to the expansion of employment in the accommodation industry.

Table 10 : Regular Workers in Accommodation Industry, 2010-2017

Year	2010	2011	2012	2013	2014	2015	2016	2017
Number of Regular Workers ¹	6,450	6,582	7,886	7,171	9,403	8,532	8,525	8,642
Number of Part-Time Workers ²	3,349	4,078	3,840	4,736	2,758	3,512	3,408	3,685
Total Numbers	9,799	10,660	11,726	11,907	12,161	12,044	11,933	12,327

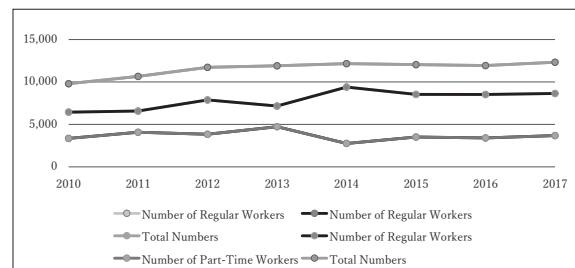


Figure 15 : Regular Workers in Accommodation Industry, 2010-2017

Source: Okinawa-Ken Bunka Kankou Suports-Bu Kankouseisaku-ka, “maituki-kinnro-youkei-tyousa-tihou-tyousa.” [Based on this material, the author created graphs and tables.]

The increasing number of foreign tourists visiting Japan has brought expansion not only for the accommodation industry but for the industry of the whole Okinawa prefecture. For example, when we look at the employment situation in Okinawa as a whole, as the number of jobs available increases, section ratio of monthly basis became 0.58 times, which is the best since Okinawa was returned to the Japanese government. The unemployment rate also decreased from about 8% in 2010 to 5-6% in 2013. In fact, during a few months of 2013, the unemployment rate dipped as low as 4% , which was the lowest level in 18 years³⁷.

In addition, as the Japanese economy has expanded and the number of available jobs increases, the number of employed people has also been rising. Therefore, the increasing employed number led to a further decrease in the unemployment rate, to around 3.8% in 2017³⁸.

4. An Issue with the Labor Shortage and a Possibility of *Minpaku*

Even though it is remarkable that most of tourists stay in resort hotels in Okinawa, the number of foreign tourists staying in vacation rentals has increased. It means that the possibility of these rentals developing the accommodation industry in the future will be high³⁹. However, since some of them are run illegally, there have been several problems such as insufficient hygiene management or negative influences on nearby local citizens causing from noise and waste. Because of that, a new law regulating private lodging businesses took effect on June 15, 2018⁴⁰. This law made it harder to run a vacation rental than before by revising the rules and regulations. This law also has led to a decrease in the number of illegally run vacation rentals. There were 2,905 vacation rentals in Okinawa on Airbnb before enforcing the law. After the law, because some of them were deleted on the page due to not meeting the rules, the number fell to 1,449 in June 2018⁴¹. Though the number of illegal vacation rentals has decreased, there are still 949 listed on the site, about which a notification was submitted to Okinawa in June 2019⁴². It is likely that these illegal rentals will cause some problems again. These problems

need to be dealt with in order to make a comfortable environment for both local citizens and tourists.

Once again, the more accommodation facilities Okinawa has for tourists, the more the cities earn as tourist income. However, although the increasing number of accommodation facilities has brought new employment, it has caused the problem of serious labor shortage across the whole industry. It will be necessary to construct a new accommodation facility carefully so that this problem stops. In fact, the biggest hindrance to meeting the demands of increasing tourism is a serious accommodation labor shortage. Nobuyuki Okamoto said, “when it comes to economical effort in a hotel, the problem of labor costs needs to be focused on as much as the management of expenses. The future of the accommodation industry will be dark if you keep labor costs per employee low”⁴³. The solution to the problem is one of the important tasks in developing an accommodation industry in future. There are some solutions to the problem, such as the increasing employment of foreign workers, adopting IT, or refurbishing an accommodation for the purpose of decreasing the necessary labor.

Through our examination, we could clarify that the increasing number of foreign tourists to Okinawa, especially coming from East Asian countries, has been leading to an increase in the demands for lodgings during the 2010s. Furthermore, increasing lodging demands from foreign tourists visiting Okinawa has brought continuous construction of accommodation facilities such as hotels, condominiums and vacation rentals. This relates to the dramatic increase in the number of guest rooms and overall guest capacity. As a result, the demand for labor in the accommodation industry has risen and it has facilitated employment in all of the labor markets in Okinawa. However, we cannot say that the supply of labor has caught up with the increasing employment in the accommodation industry. This issue has been gradually becoming worse. It is vast task for the developing accommodation industry to cope with this problem.

IV: Initiatives to Advance Tourism in the *Yanbaru* Region

The previous sections examined the economic and employment effects brought about by the tourism boom of the 2010s on the entire Okinawa Prefecture. This section shows how the *Yanbaru* region has been trying to incorporate the recent dynamism of Okinawa’s tourism into development of its own regional economy and industry, with particular focus on the two ongoing tourism related projects in the region - that is, the “Motobu port cruise liner hub project” and the “UNESCO World Natural Heritage registration project of the Yanbaru region.” Through the consideration of these two projects, the section shows the possibility of future development of the Yanbaru region, in where Meio University is located.

1. The Motobu Port Cruise Liner Hub Project

First, the “Motobu Port Cruise Ship Base Formation Project” is a large-scale tourism project promoted by the Japanese government and Okinawa Prefecture, and is intended to form an international cruise ship base at the Central Port by 2021⁴⁴. As Figure 16 shows, the cruise population from Asia has increased by about 2.7 times over the decade from 2005 to 2015, compared with a 1.7-fold increase in the global cruise population over the same period. It is understood that the cruise population in Asia is increasing with the increase of the wealthy through economic development. The Japanese government Ministry of Land, Infrastructure, Transport and Tourism focused on this situation, and designated six international cruise bases to be built through public-private partnerships: Yokohama Port, Shimizu Port, Sasebo Port, Yatsushiro Port, and Hirako Port in mainland Japan, and the Headquarters Port of Okinawa Prefecture. The target of five million cruise passengers to Japan was set in 2020.

The current port of Motobu is smaller than Naha port, and the number of cruise ships that call at it is very small⁴⁵. However, by realizing the “Headquarters Port Cruise Ship Base Formation Project,” a target of 220,000 passengers by 2030 is aimed for. As a specific numerical target, by 2030 the town of Motobu plans to host 200,000-ton cruise

ships 26 times; 150,000-ton cruise ships 26 times; and 70,000-ton cruise ships 52 times⁴⁶, mainly targeting tourists from China, Taiwan and Hong Kong. Under the plan, the Genting Hong Kong Group will be in charge of the construction of the passenger terminal building at the Port of Motobu, and the Genting Hong Kong group and local organizations will jointly manage and operate the passenger terminal after completion. The 15 years after the port opens will also give Hong Kong priority by allowing two-thirds of the total cruise ships to be sailed. If the project is completed and operational by 2021 as planned, the port will be one of the leading international cruise hubs in Japan, with large numbers of cruise ship passengers from Hong Kong and other East Asian regions landing directly in the area. As a result, it is expected that the economy and industry in the Yanbaru region will be greatly promoted⁴⁷.

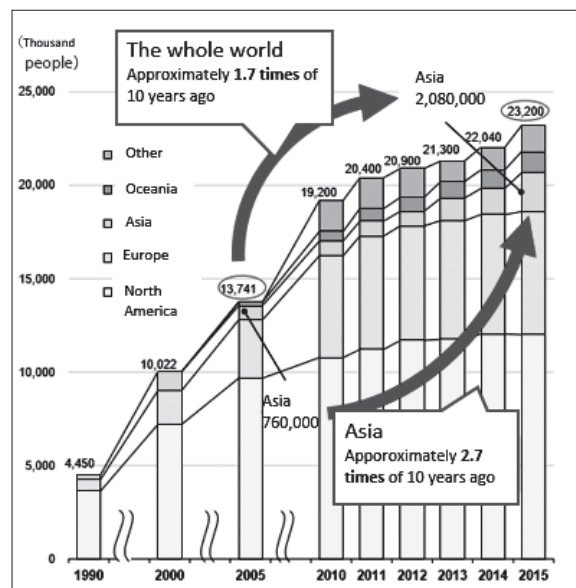


Figure16: Transition of cruise ship population in the world.

Source: Kokudokoutu-syo kouwankyoku sangyoukouwann-ka (Ministry of Land Infrastructure, Transport and Tourism Port Authority Industrial port section), Ministry of Land, Infrastructure, Transport and Tourism, 2017.

However, contrary to these optimistic expectations, there are some challenges that can lead to the direct promotion of the region’s economy due to the surge in cruise passengers visiting the region. One of the issues is the delay in the development of tourist facilities and commercial facilities around the Headquarters Port, and a significant shortage

of human resources to accommodate cruise ship passengers. Now, there are “Ocean Expo Memorial Park” and “Churaumi Aquarium,” which are meccas for Okinawa tourism, but since they are state-owned facilities, the town of Motobu will not directly profit from increased tourism to those sites. Moreover, according to the staff of the Motobu Planning, Commerce and Tourism section, one proposal at present is to make a facility to show traditional performing arts and to showcase “Japan’s earliest cherry blossom festival.” However, the cherry tree can only be used as a sightseeing resource for a small amount of time in the spring.

Another issue is the delay in business development to satisfy the needs of “shopping and food” demanded by Chinese people, who make up the majority of tourists⁴⁸. Figure 17 shows the unit price of consumption by category of Okinawa prefecture travelers who arrive by sea route. According to the data from Naha Port, which is based on the unit price paid by foreign tourists by country, the ratio of the combined value of “souvenir and shopping expenses” and “food and beverage expenses” is about 80% for the total passengers, while for Chinese tourists it is about 82%. It is understood that “Souvenir and shopping expenses” and “Food and beverage expenses” are still higher than for tourists from other countries⁴⁹. Hanasaki Marche, a resort market that recently opened in Motobu town, is a tourist facility specializing in gourmet food and shopping targeting Chinese tourists. Unfortunately, the Hanasaki Marche is not large enough to meet future cruise passenger demand.

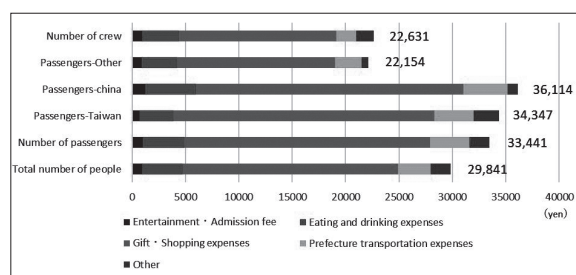


Figure 17: Cost of consumption for Okinawa travelers from sea routes by item.

Source : Okinawa-ken bunka kanko supoutsu-bu kannkouseisakuka (Department of Culture, Tourism and Sports, Okinawa prefecture)

2. The UNESCO World National Heritage Registration Project

The most likely future demand from cruise ship travelers that will be connected to the promotion of the Yanbaru region is Eco-tourism, which is becoming more popular around the world. The Yanbaru region has precious plants and animals, a beautiful natural environment made by the sea and forest, and so is valuable as a sightseeing resource. Shibasaki interviewed passengers about the value of four cruise lines which arrive in and depart from Japan: Oceania cruise, Hosojima cruise, Chichijima cruise and Miyazaki Kouchi cruise item by item. When comparing three different aspects of travel—Nature, History/Culture, and Leisure—Nature and History/Culture scored higher than Leisure, and Nature was also valued more than History/Culture⁵⁰. The subjects of this investigation was mainly Japanese tourists not Chinese. However, these results show that cruise ship tourists tend to be interested in the Nature. From this data, it is expected that the Yanbaru natural environment will appeal to tourists and it will support the development of Eco-tourism businesses.

One of these actions is the World Natural Heritage registration project. If the Yanbaru World Natural Heritage registration is successfully completed, the region will be able to market itself as a sightseeing resource, which will increase foreign tourists’ interest in Yanbaru and thus increase the number of tourists to the region. The Ministry of the Environment designated the Yanbaru forest as a national park in 2016. One training park in the Northern area that was owned by the United States Armed Forces was returned to Okinawa⁵¹. After Okinawa Prefecture received this, the Okinawa and Japanese governments applied to the UNESCO World Heritage registrations committee.

However, registration has not yet been able to be successfully completed. One reason is that the “Vast forests of the US north training trace were not included and the recommended areas are divided into 24 areas, which means that there are several enclaves. These were one of the problems”⁵² In detail, the plan is to register Tokuno island, the Yanbaru area, and Iriomote island. The ruined North training

area was not included in the recommend range. Other concerns include threats to naturalized species, traffic accidents involving tourists, and creatures taken out of the forest⁵³. But, the World Heritage registration action started in 2015 and the Yanbaru National Park was designated in 2016. Now, Okinawa Prefecture has aimed to have the Yanbaru re-registered as the World Natural Heritage for 2020.

If the Yanbaru World Natural Heritage registration is successfully completed, an increase in tourism is also anticipated. As an example, tourism increased in Yakushima because of the World Heritage registration. In 1993, at the time of the World Heritage registration, the number of tourists who visited Yakushima was 209,219. That number increased to 314,766 people by 2003 and more than 400,000 by 2007. Though the number decreased to 298,311 in 2013, comparing 1993 to 2007 shows an increase of nearly 100,000 people since 1993. Further, in the case of Yakushima, the increase in the number of tourists helped develop the guide business. Although the guides accounted for just 0.3 % of the whole working population in 1995, the rate became 2.3% in 2014⁵⁴.

In other words, an increase in tourism could develop a third industry as a spreading effect. Since this is possible of Eco-tourism, Kunigami Village in the Yanbaru region opened a lecture. Kunigami Village invited Matsuda who works as an interpreter of the nature in Shiretoko, Hokkaido as a lecture. He introduced the fact that there are some guides working in Shiretoko who have been earning 200,000 yen per day. Therefore, he mentioned that Yanbaru “will have the same possibility as Shiretoko”⁵⁵. Also, because the service industry is a branch of the labor productivity field in Okinawa, service industry’s availability is quiet high⁵⁶. Our university, Meio University, held a two-month English conversation lecture at no cost for the purpose of training people who want to be able to give visitor information and work as tour guides in order that Yanbaru will be registered as a World Natural Heritage.

In this way, if the “national cruise ship base project” on Motobu port will succeed and the Yanbaru will be registered as the World Natural Heritage, an increase of tourists will be anticipated. Also, an increase of tourists will bring sightseeing

income to the Yanbaru area and it will help to develop third industries such as guide business or many kinds of jobs connected to tourism. Actually, there are several problems in order that it can be successful. However, assuming that both two projects may succeed, we can expect that these have great impacts to the economy on Yanbaru.

Conclusion

This paper statistically examined the economic and employment effects on Okinawa prefecture brought about by the rapidly increasing number of East Asian inbound tourists during the 2010s, with particular focus on the impacts on the transportation and accommodation industries. The paper argues that the rapidly increasing number of foreign inbound tourists, especially those from East Asia, has significantly helped to promote Okinawa’s economic development and to create new employment opportunities for Okinawan people during the 2010s.

Our study shows that the number of foreign tourists visiting Okinawa prefecture increased about 9.5 times between 2010 and 2017. It reached approximately 2.9 million in 2018 and is expected to surpass 3 million very soon. Indeed, more than 80 % of these foreign inbound tourists visiting Okinawa came from Taiwan, China, Korea and Hong Kong during the 2010s. The study also demonstrates that each East Asian inbound tourist spends more than one domestic tourist from the mainland of Japan during their stay in Okinawa. It is clear that the dramatic and consistent increase in the number of East Asian inbound tourists has become a driving force behind the Okinawa tourism boom of the 2010s. This boom, in turn, has helped to considerably increase industrial sales related to the tourism industry, to increase production in other industries in Okinawa through the activation of general consumption caused by a gain in income, and to create new employment opportunities for many Okinawan people over the last decade.

Our study demonstrates that the rapidly increasing number of East Asian inbound tourists has largely helped to develop the aviation, shipping and accommodation industries. The number of passengers at Naha International Airport increased

8.7 times from about 407 thousand in 2010 to about 3.6 million in 2017, and the number of landings at the airport also tripled from about 3,400 times to 11,900 times during the same period. Construction of a second runway at Naha Airport is now underway in order to cope with the dramatically increased demand for landing and taking off of aircraft. Also, there has been a significant number of East Asian inbound tourists traveling to Okinawa by sea. In 2018 alone 243 cruise ships sailed to Okinawa. Taking account of the advantage of bringing in large numbers of foreign tourists at once, the Okinawa prefectural government has set up an initiative to make the prefecture the center of the cruise network throughout East Asia. Thanks to strong accommodation demand created by the current foreign inbound tourism boom, the number of accommodation facilities, hence the number of guest rooms, in Okinawa has significantly increased over the last decade. This led to the creation of a large number of new employment opportunities in the industry.

It is clear from our analysis that the rapidly and consistently increasing number of East Asian inbound tourists during the 2010s has largely helped to develop the aviation, shipping and accommodation industries. These developments, in turn, have promoted Okinawa's overall economic development and created new employment opportunities for many Okinawan people during the 2010s. As a result, Okinawa's tourism industries in general and accommodation industry in particular have been facing a serious problem of labor shortages as labor supplies have consistently failed to meet the demands over the last decade.

Our study illustrates that the *Yanbaru* region, where Meio University is located, has been trying to incorporate the recent dynamism of Okinawa's tourism into development of its own regional economy and industry by implementing the "Motobu port cruise liner hub project" and "the UNESCO World Natural Heritage registration project." While successful completion of the two projects still remains unclear, the future prospect of tourism in the *Yanbaru* region is now becoming more positive than otherwise.

Notes

- 1 Okinawa-ken bunka kanko supoutsu-bu Kankouseisaku-ka, "Heisei 30-nendo Nyuiki Kankoukyaku Tokeigaikyoku", Okinawa-ken, March 2019.
- 2 Okinawa-ginkou, "2019 (Heisei 31) nendo Okinawa-keizai heno mitooshi ", Okigin-chousageppou, January 2019, p.10.
- 3 Okinawa-ken bunka kanko supoutsu-bu Kankouseisaku-ka, "Heisei 30-nendo Nyuiki Kankoukyaku Tokeigaikyoku", Okinawa-ken, March 2019.
- 4 Koji Kitada, "Okinawa-ken ni okeru kanko no kokusaika", Chirigaku-ronshu, 2011, vol.86, no.1, pp.24-40.
- 5 Okinawa-ken bunka kanko supoutsu-bu Kankouseisaku-ka, "Heisei 30-nendo Nyuiki Kankoukyaku Tokeigaikyoku", Okinawa-ken, March 2019.
- 6 Okinawa-ken bunka kanko supoutsu-bu Kankouseisaku-ka, "Heisei 26-nendo Nyuiki Kankoukyaku Tokeigaikyoku", Okinawa-ken, March 2015.
- 7 Okinawa-ken bunka kanko supoutsu-bu Kankouseisaku-ka, "Heisei 30-nendo Nyuiki Kankoukyaku Tokeigaikyoku," Okinawa-ken, March 2019.
- 8 By the way, the item of "others" shows a ratio 26.0 % and 19.6 % each in both 2019 and 2017, showing the tourists who come from areas in Asia such as Singapore and Thailand. They are visiting Okinawa with the Low-cost carrier such as Peach Aviation and Jetstar Asia Airlines. The source: Okinawa prefecture, culture tourism sport division, sightseeing policy section, The entry into a zone tourist statistics general condition in 2018, Okinawa prefecture, March 2019.
- 9 The cause for the decrease in tourism revenue and consumption per tourist in 2011 and 2012 in comparison with 2011 is thought to be connected to the effects of the Great East Japan Earthquake and a decrease in hotel charges at resort hotels. Source: Okinawa-ken bunka kanko supoutsu-bu Kankouseisaku-ka, "Heisei 23-nendo no kankoshunyu ni tsuite" Okinawa-ken, 2012.
- 10 The data comes from 2012, 2015, and 2017

- because Okinawa performs this study every several years.
- 11 Okinawa-ken bunka kanko supoutsu-bu kanko seisaku-ka, “Okinawa-ken ni okeru ryokou, kanko no keizaihakyukoka”, Okinawa-ken, 2013-2018.
 - 12 Okinawa-ken bunka-kanko supoutsu-bu kanko seisaku-ka, “kanko tokei jittai chosa”, dai 2 sho, kengaiyaku no ryokonaiyo to kankosyunyu no suihei, 2018.
 - 13 Koji Kitada, “International of tourism in Okinawa”, Chirigaku-bunshu, 2011, vol.86, no.1, pp.24-40.
 - 14 Okinawa-ken bunka kanko supoutsu-bu kankoseisaku-ka, (Department of culture, Tourism and Sports, Okinawa Prefecture) “Okinawakenniokeru Ryokou・Kankouno Keizai Hakyuu Kouka 【Suikei Kekka】
 - 15 Okinawa-ken bunka kanko supoutsu-bu kankoseisaku-ka, (Department of culture, Tourism and Sports, Okinawa Prefecture) “Okinawakenniokeru Ryokou・Kankouno Keizai Hakyuu Kouka 【Suikei Kekka】
 - 16 “Okinawa Times” 30 March 2019.
 - 17 Number of Passengers in Japan Airport Ranking: Tokyo International Airport (1st) Narita International Airport (2nd) Kansai International Airport (3rd) Fukuoka Airport (4th) Shin Chitose Airport (5th) Naha Airport (6th).
 - 18 Kenji Tanaka says about entry foreign tourists to Japan, “It is very important to gain repeaters in order to gain travelers over the long term and increase the number of travelers arriving from now on.” Kenji Tanaka “Gaikokujin kankokyaku no hounichi sokushin-saku ni kannsuru kenkyu-Kokusai kanko no genjo no bunseki to anteiteki na ryokousha no kakutoku wo chuushin to site-” Unyuseisaku-kenkyu, 2007, vol.10, no.1, p. 14. Noboru Toguchi says, “Tourists who come to Okinawa are mainly repeaters. In other words, they know where everything is in Okinawa. Repeaters have many free travel plans, not tour types, and use rental cars to tour Okinawa. At that time, since there are many opportunities to visit and shop at various facilities, the amount of consumption per person is high. Noboru Toguchi “Kanarazu moukaru kanko biznesu.” Tokyo: Gento-sha, 2014, p. 37.
 - 19 Keisuke Kinumoto said, “The runway of Haneda Airport has increased the processing capacity of the airport,” and Naha Airport can be expected to have the same effect. Keisuke Kinumoto History of Haneda Airport 2010 https://www.jstage.jst.go.jp/article/jjca/48/4/48_4_4_7/_pdf/-char/ja[Accessed: July 18, 2019]
 - 20 Naikaku-hu Okinawa Sougou Jimu Kyoku Kaihatsu Kensetsu-bu Naha kuukou Purojekuto ho-mu peizi () “Naha-kuukou purojekuto” Naikaku-fu2017 Online.Available <http://www.dc.ogb.go.jp/Kyoku/information/nahakuukou/zousetugaiyou.html> [Accessed: July 10, 2019]
 - 21 As an outline of Naha Port, it is a special local government project established by three municipalities in Okinawa Prefecture, Naha City, and Urasoe City, and consists of four districts: Naha Futo District, Tomari Futo District, Shinko Futo District, and Urasoe Futo District.
 - 22 Nahako kanrikumiai kuruuzusuisin-ka, nahako kannrikumiai ho-mupe-zi, 2019 Online Available https://nahaport.jp/introduction/cruise_promotion/ (accessed 27 Jun 2019).
 - 23 Okinawa-ken bunka kanko supoutsu-bu kankoseisaku-ka kankobunka kikakihan “Reiwagannen (2019) 5gatsu nyuukikankokyakusuu gaikyo” Okinawa-ken, 2019.
 - 24 Mr. Shinya Hanaoka said, “The status of access transportation has had a strong impact on the choice of airports.” Shinya Hanaoka “hukusu kouku shisutemu ni okeru kinoubuntan no hyouka -syutoken hukusu kouku wo zirei tosite”,Unyu seisaku kenkyuuzyo, 2003, No.200302, p.21.
 - 25 On June 19, 2019, at 13:14 p.m., we interviewed the staff of the Planning, Commerce and Tourism Division of the Motobu Town Hall at the Motobu town hall. In addition, Mr. Hisaaki Goeku said, “In fact, it is a short-term stay, so that many of the cruise ships that call in Okinawa arrive early in the morning and leave in the evening. When we examined the schedule of port visits at Naha Port this year, only about 20% of all 293 cruise ships stayed across the date.” Okinawa Times Plus. 17 July 2019. Online. Available <https://www.okinawatimes.co.jp/articles/-/446115> (accessed 18

- July 2019).
- 26 Mr. So-tetsu Sen has raised doubts about the economic effects of cruise passenger behavior patterns, such as the lack of acceptance of cruise ports in Japan and the limited duty-free shops and shopping facilities. So-tetsu Sen “honichi gaikokuzinkankoukyaku 4000mannin zidai ni sonaeta kyusyu inbaundo:kuruzusen kikou wo rei ni” Syokeironso, Kyusyudaigaku, 2016, vol.53, no.3, pp.55-70.
- 27 “The Japan Times” 13 April 2018.
- 28 “Asahi DIGITAL” 16 August 2018.
- 29 About the aviation industry, Naha Airport has been collecting passenger handling facility charges from March 31, 2019. Per person departing from the country, ¥1,000 (\$10) for adults and ¥500 (\$5) for children, domestic departures and arrivals are collected per person, ¥120 for adults and ¥60 for children. “Zaikei shinbun” 29 December 2018.
- 30 Okinawa-ken bunka kanko supoutsu-bu kankoseisaku-ka Online.Available <https://www.pref.okinawa.jp/site/bunka-sports/kankoshinko/yuchi/h29touyouonokaribukousou.html> (accessed (10 July 2019)).
- Okinawa prefecture also mentions five things to do in the future. (1) Promotion of the development of ports of call through the steady maintenance of international cruise bases and ports in Okinawa prefecture through public-private partnerships; (2) Attracting and promoting cruise tours around the Southwest Island; (3) Promotion of flights and cruises using abundant air routes in Japan and overseas; (4) Promotion of the arrival and departure port, base port, and home port of domestic and overseas cruise ships; and (5) Raising recognition as a cruise base by holding cruise business meetings in Okinawa, such as sea trade cruises. Of these, especially from Number 5, it can be seen that Okinawa is important in establishing an international cruise base in Japan.
- 31 “The Japan Times” 13 April 2018.
- 32 In Japan, Okinawa ranked No.11 in 2010, No.9 in 2011, No.8 in 2012, and No.6 in 2013 and 2014. It kept the rank of No.5 from 2015 to 2017. In 2017, the number of foreign tourists who stayed in Japan was as follows: Tokyo (No.1), Osaka (No.2), Hokkaido (No.3), Kyoto (No.4). (Source: Kokudo Koutsu Kankou-Cho, “Shukuhaku Ryokou Toukei Chousa,” 2011-2017).
- 33 Okinawa-ken Bunka Kankou Suports-Bu Kankouseisakuka, “Syukuhakushisetsu Jittai Chousa.” Okinawa-ken, 2011-2017.
- 34 Okinawa-ken Bunka Kankou Suports-Bu Kankouseisakuka, “Heisei 29-nendo Kankou Youran.” 2018, p 21.
- 35 Okinawa-ken Bunka Kankou Suports-Bu Kankouseisakuka, “Gaikokujin Kankoukyaku Chousa,” 2018, p 34.
- 36 Regular workers: Okinawa-Ken Bunka Kankou Suports-Bu Kankoseisaku-ka, “Gaikokujin Kankoukyaku Chosa”, Okinawa, 2018, p.41.
- 37 Ryugin Sougo Kenkyujo “Okinawa-ken keizai 2013 nen no kaiko to 2014 nen no tenbo” Ryukyuginko, 2013, p. 6.
- 38 Ryugin Sougo Kenkyujo “Okinawa-ken keizai 2017 nen no kaiko to 2018 nen no tenbo” Ryukyuginko, 2017, p. 6.
- 39 Recently, tourists can reserve minpaku freely by using Airbnb, the site that mediates between people who want to stay in minpaku and the minpaku’s owner,.
- 40 Minpaku Mipaku Seido partal site,” Jutaku Syukuhaku Jigyohou (Minpaku shihou toha?), <http://www.mlit.go.jp/kankocho/minpaku/overview/minpaku/law1.html> (accessed 6 July 2019).
- 41 AirLabo, “Okinawa-ken Airbnb Listing Suisu” (2 June - 15 June, 2018) Online Available http://airlabo.jp/article/?area_id=47000 (accessed 6 July 2019).
- 42 Okinawa Times, “Minpaku no Todokede 949 ken,Okinawa ha Zenkoku 4 banme, Sinnhoushihou 1 nen, Souon ya Gomimondai” 15 June 2019.
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- 46 Okinawa-ken doboku kennchiku-bu kouwan-ka.
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- 47 Interview with the staff of the Motobu town
government office Planning, Commerce and
Industry sightseeing section performed at the
Motobu town government office on 19 July 2019 at
13:00~14:00.
- 48 Interview with the staff of the Motobu town
government office Planning, Commerce and
Industry sightseeing section performed at the
Motobu town government office on 19 July 2019 at
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- 49 Okinawa-ken bunka kanko supoutsu-bu
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- 51 Okinawaken Kunigamison Sekaisizenisan
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- 52 “Okinawa Taimusu” 6 November 2018.
- 53 “Okinawa Taimusu” 26 December 2018.
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- 56 Andou Yumi, Miyagi Kazuhiro, Okinawa-
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