



**RUGBY
WORLD CUP™**
JAPAN 日本 2019
ORGANISING COMMITTEE

THE ECONOMIC IMPACT OF RUGBY WORLD CUP 2019™



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01 Economic benefits of hosting Rugby World Cup 2019

Summary – analytic framework and impacts	3
Rugby World Cup 2019 in numbers	5
Impact numbers in categories	7
Useful actions to expand the impact	8

02 Case studies

Iwate Prefecture, Kamaishi City	9
Kanagawa Prefecture, Yokohama City	11
Kumamoto Prefecture, Kumamoto City	13

*Cases are selected from different regions and include cities hosting the final and recovering from natural disaster.

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- This report summarizes the results of analysis of the economic impact of the Rugby World Cup 2019, to be held in 2019 in Japan. It was produced in accordance with a service agreement between the Rugby World Cup 2019 Organising Committee (the requestor) and Ernst & Young ShinNihon LLC (the provider) for the purpose of analyzing the impact within Japan of socioeconomic activity associated with the Rugby World Cup 2019.
- A variety of rounding methods were used to derive monetary figures cited in this report. As such, rounding differences may occur between related figures in the report.

Summary – analytic framework and impacts

Purpose of the report

As one of the world's biggest major global sporting events, the Rugby World Cup™ (RWC) brings with it a variety of economic benefits. The economic impact of Rugby World Cup 2019™ estimates those benefits and provides information that local authorities and private businesses in the host cities can use to maximise the benefits from the tournament.

This report reviews the history of previous tournaments and describes the expected economic impact as well as points for boosting that impact. It also presents case studies of actual efforts by three host cities. The impact numbers in the report reflect economic impacts expected before and during the tournament, not counting those afterwards.

Our approach to measuring the benefits

Our economic impact analysis examines the direct economic impact from increases in spending and demand from stadiums and other infrastructure, tournament operations, and fans, and then uses inter-industry analysis to estimate the primary and

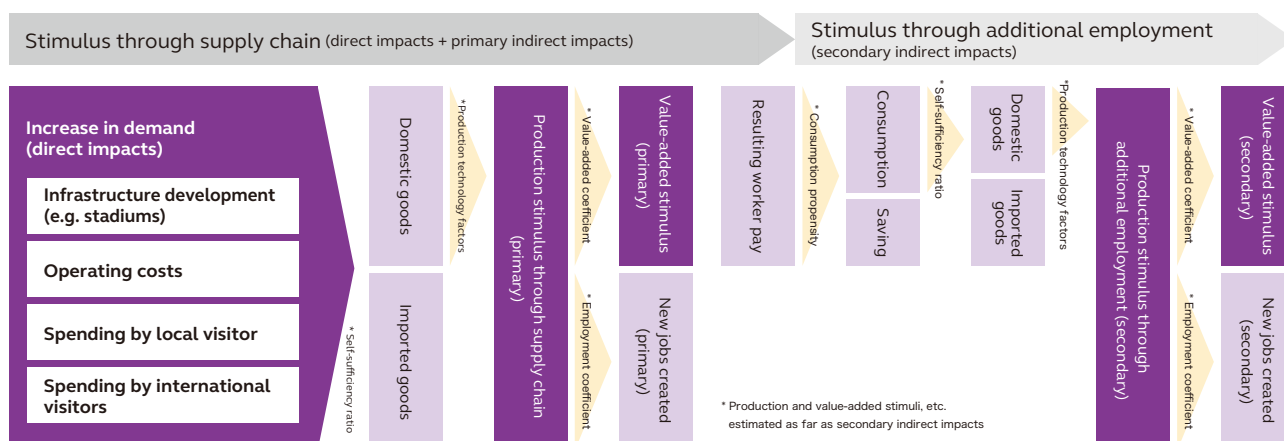
secondary indirect impacts.

Estimates are based on data and projections available as of September 2017, and may be significantly affected by future developments in hosting plans and economic trends.

Analytic framework

	Direct impacts	Primary indirect impacts	Secondary indirect impacts
Pre-tournament preparations	<ul style="list-style-type: none"> • Infrastructure development (stadia etc.) • Operating costs 		
Delivering the Tournament	<ul style="list-style-type: none"> • Operating costs • Spending by local visitors • Spending by international visitors 	Increased demand throughout supply chain in Japan	Increased spending arising from additional employment
	Increase in demand	Production/value-added stimulus through supply chain	Production/value-added stimulus through additional employment

Analytic flow chart



Summary of the benefits

Since the first Rugby World Cup in 1987, the tournament has grown in size and stature, and it is not unusual for fans from around the world to stay in the host country for several weeks. Through increases in international visitors, infrastructure investment, and prudent use of the tournament, host countries*1 can enjoy continued economic benefits even after the tournament.

RWC2019 in Japan could attract up to 1.8 million fans, exceeding RWC2011 in New Zealand, the last time it was held in the Asia-Pacific region. Tourism and other spending by the anticipated 400,000 overseas fans will provide economic stimulus in host cities and throughout Japan. Total direct impact from international visitors is estimated to reach around ¥105.7 billion

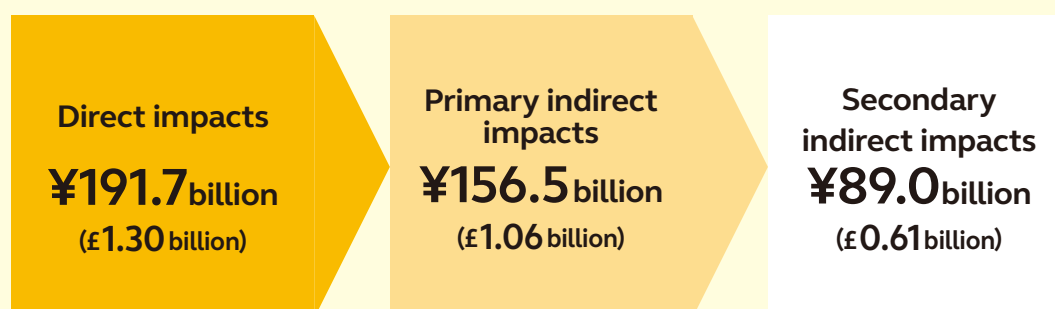
(£0.72 billion*2).

Infrastructure investment for the tournament is expected to exceed ¥40.0 billion (£0.27 billion). The anticipated boost in attention from overseas should also continue to attract visitors from around the world after the tournament.

Total output of RWC2019 in Japan is estimated at ¥437.2 billion (£2.97 billion), the resulting GDP increase (value-added stimulus) at ¥216.6 billion (£1.47 billion), the associated increase in tax revenue at ¥21.6 billion (£0.15 billion), and the increase in employment at 25,000 jobs.

It is expected that strategic actions to sustain economic impacts after the tournament would further increase the overall benefits.

Total output ¥437.2 billion (£2.97 billion)



GDP increase ¥216.6 billion (£1.47 billion)

Increased tax revenue

¥21.6 billion
(£0.15 billion)

Increase in employment

25,000 jobs

International visitors
to the tournament

400,000

*1 The Rugby World Cup may be hosted by a country rugby body, but for the convenience of readers we have used the term "host countries" in this report.

*2 This report uses a UK pound to Japanese yen conversion rate of 1 UKP = 147.12 JPY (PPP, 2016 (OECD statistics)).

Rugby World Cup 2019™ in numbers

The rising popularity of the Rugby World Cup™ worldwide

Large increase in number of teams participating

16 teams participated in the first tournament in 1987. The 9th tournament in 2019 will have 73 teams.

* The first tournament did not feature qualifying matches.

1987
16 teams

2019
73 teams

Increase in membership in World Rugby

As of January 2018, 121 Unions (territorial breakdown in the right column) and 6 Regional Associations are members of World Rugby.

Africa	23
Asia	22
Europe	41
North America	13
South America	10
Oceania	12

Large increase in spectators at tournament matches

The first tournament in 1987 sold 600,000 tickets. The tournament in 2015 sold a record of 2.47 million tickets.

1987
600,000

2015
2.47 million

Large increase in TV viewership

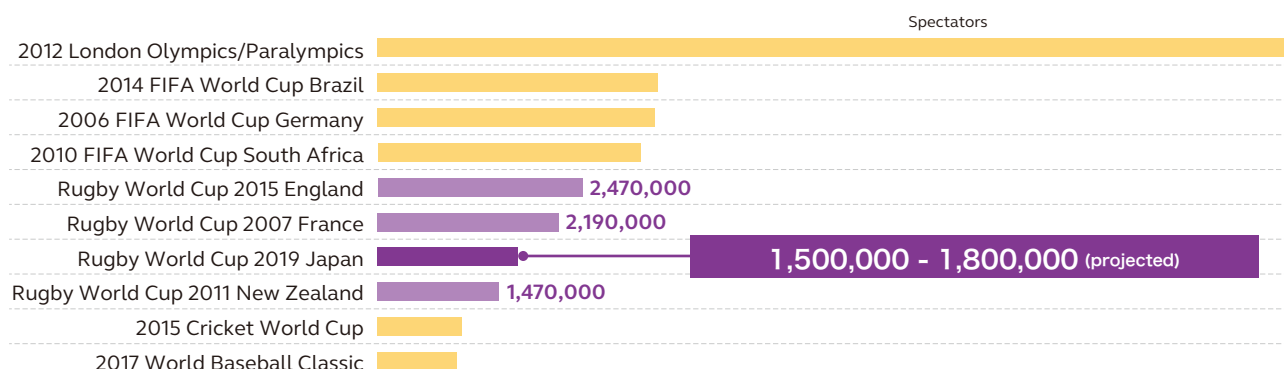
The first tournament in 1987 attracted 230 million TV viewers. With the global rise in popularity, the 8th tournament in 2015 was watched by an estimated 4 billion people.

1987
230 million

2015
4 billion

Third most popular sporting event after Olympics & FIFA World Cup

The Rugby World Cup boasts more paying spectators than any other single sporting event except for the FIFA World Cup. It is also a long event: RWC2019 will last 44 days, far longer than any other tournament. The FIFA World Cup lasts 32 days, and the Summer Olympics only 17 days.



Host cities (match venues) and key figures

RWC2019 will take place in 12 venues in 12 cities, from Hokkaido to Kyushu. This wide regional spread means that economic benefits will be broadly shared.

Over 10,000 volunteer staff will help with match operations in stadiums and serve as guides for supporters in the cities.

12
host
cities

12
match
venues

**Fukuoka
Hakatanomori Stadium**
Fukuoka, Fukuoka

**1 or more fan
zones
in each city**

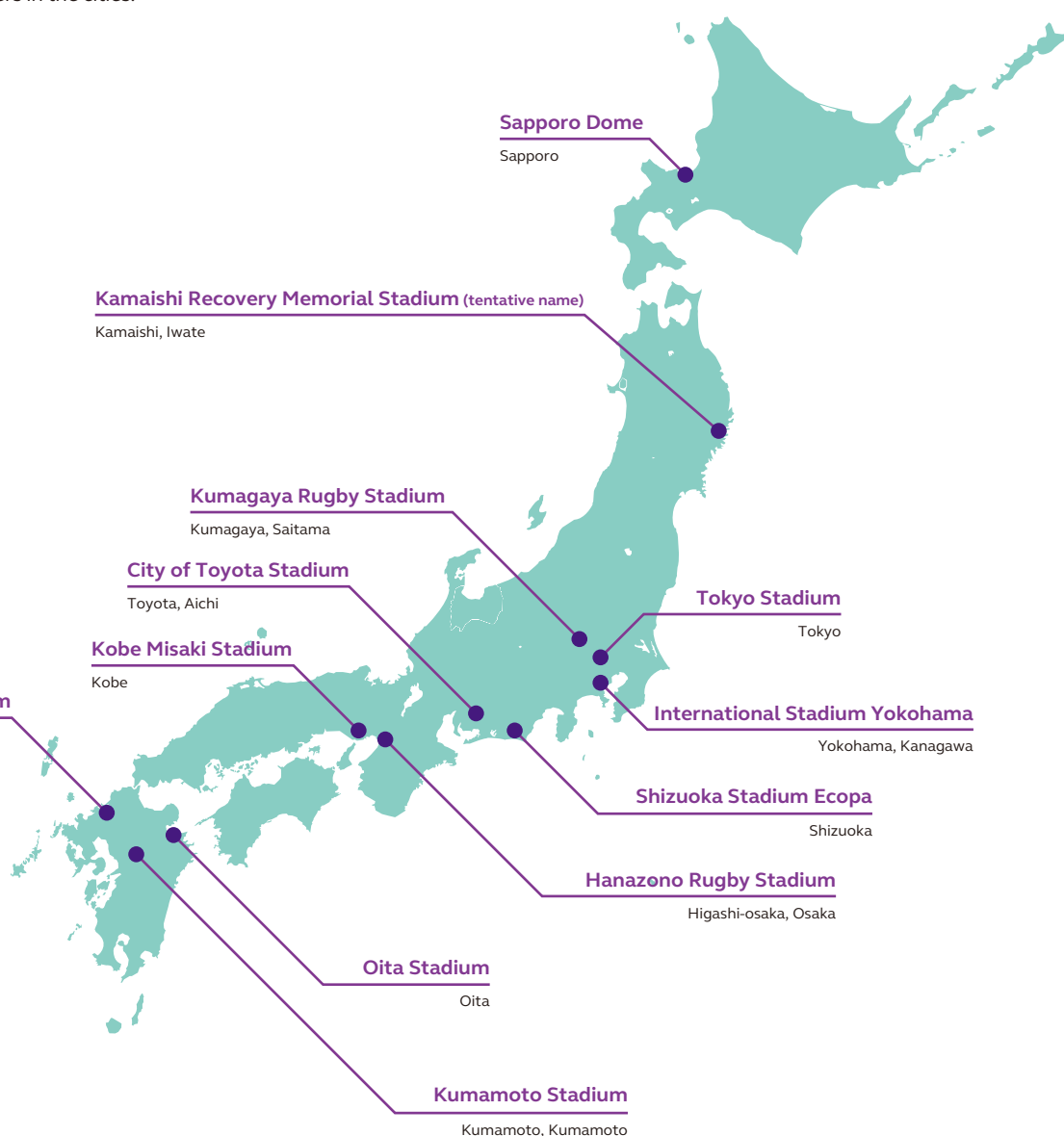
76
candidate sites
for official team
camps

48
matches

44
days

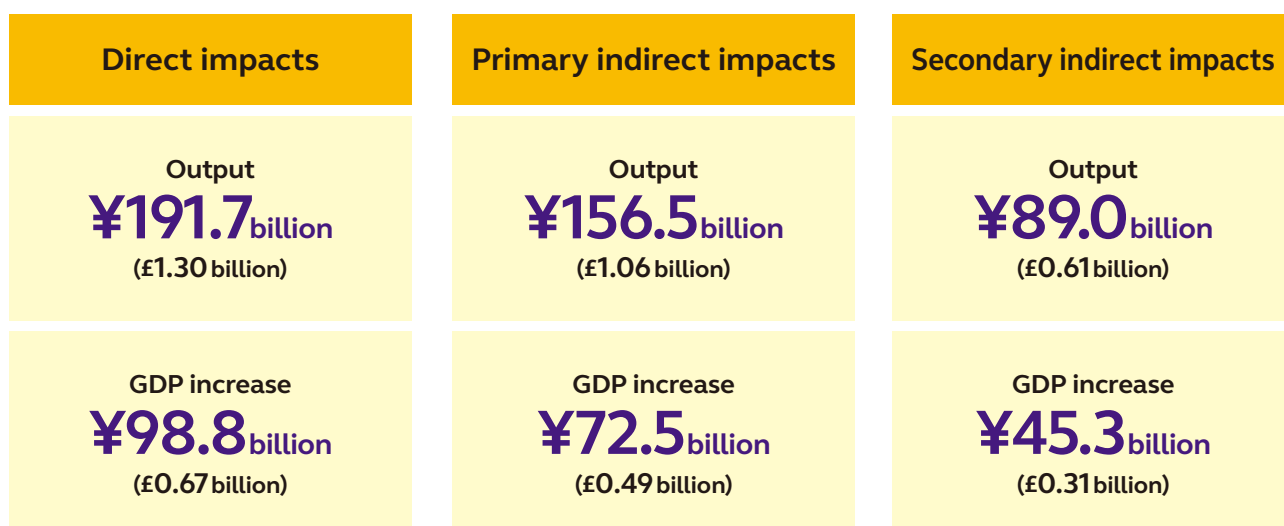
20
teams

**Over
10,000**
tournament
volunteers



Impact numbers in categories

The following is a summary of the total economic impact and GDP increase of the tournament from pre-tournament preparations through the actual tournament. The total output and GDP increase will consist of direct impacts (see breakdown), primary indirect impacts, and secondary indirect impacts. These economic benefits are described in detail below.

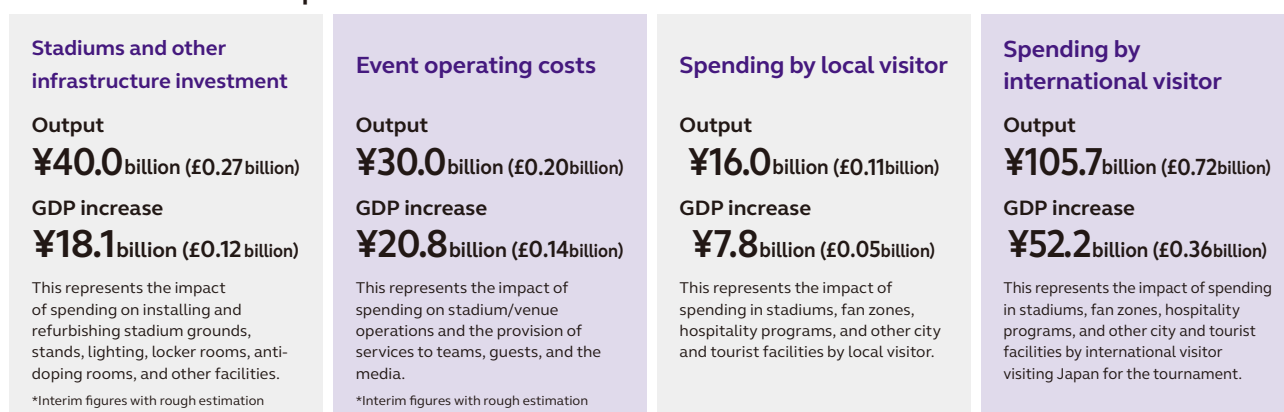


This represents the impact of spending on stadium/venue operations and the provision of services to teams, guests, and the media.

This represents the impact of spending in stadiums, fan zones, hospitality programs, and other city and tourist facilities by local visitors.

This represents the impact of spending in stadiums, fan zones, hospitality programs, and other city and tourist facilities by international visitors visiting Japan for the tournament.

Breakdown of direct impacts



* No breakdown is provided for primary and secondary indirect impacts because these are calculated from direct impacts

Useful actions to expand the impact

Below is a summary of the key points for enhancing the economic impact of hosting the tournament. We assess efforts to attract inbound fans, extend international visitors' stays in Japan, stimulate consumption by international visitors, encourage more consumption of local products, and expand tax revenues which will lead to greater economic impact for the host country and host cities.

01 Showcasing Japan to the World

One of the benefits of being a host city is the increase in visitors from abroad and other parts of Japan, which leads to increased consumption (meals, hotels, transportation) and job creation in host cities and their environs.

However, visitors from other parts of Japan will simply spend money on rugby that they would have spent on other things. For this reason, the key for Japan as a whole is attracting people from abroad and ensuring they enjoy themselves.

One likely concern for international visitors is the language barrier. Posting English-language signs on streets and in hotels and stores can help make their stay more comfortable, leading to longer stays, more positive views, and ultimately new visitors.

Social media has made it easy for individuals to share opinions and feelings with others around the world, and it is hard to overstate the influence of international visitors in transmitting information abroad. Ensuring these visitors have a good time will help ensure economic benefits continue to grow for host cities.

02 Extending international visitors' stays in Japan

A key feature of RWC is its length. Whereas the Olympics lasts only half a month, RWC lasts a month and a half, creating longer stays for fans of winning teams. Moreover, fans from faraway countries tend to stay longer, with some staying as long as several weeks.

Visitors who come to Japan for the tournament are expected to spend an average of ¥20,000 per day, giving their stays a sizeable economic impact.

One effective way to extend international visitors' stays in Japan is to create an environment that makes it easier for them to stay - for example, setting up tourism programs to keep international visitors in place until their team's next match (normally 3-7 days), even when that match is in a different city.

03 Encouraging more consumption of local products

The influx of visitors from abroad and other parts of Japan will increase economic benefits for host cities. However, when these visitors consume products from other places, some of the benefits flow to those places, reducing the economic impact on host cities. In other words, encouraging more consumption of local products will help boost the economic impact both during and after the tournament.

04 Stimulating global tourism

We expect international visitors who come to Japan for RWC to stay for extended periods, and their consumption will center on tourism around host cities. However, it is not easy for international visitor to travel around tourist areas with limited English language services. With this in mind, setting up special tours in host cities and travel packages between host cities may be one way to lengthen international visitors' stays and stimulate their consumption.

05 Expanding Tax Revenues

We expect consumption by visitors from abroad and other parts of Japan to boost economic benefits for host cities, create new jobs, and in the process expand income tax and other tax revenues. Infrastructure investment and other measures that attract more visitors and encourage them to stay longer are an effective way to achieve this benefit.

Iwate Prefecture, Kamaishi City

Overview

Profile of Iwate Prefecture, Kamaishi City

Kamaishi City was chosen as one of the venues for the Rugby World Cup 2019™, which is held every 4 years, with the support of many prefectural and city residents. Rugby has always been popular in Kamaishi City. The legendary local team, Nippon Steel Corporation Kamaishi (currently Kamaishi Seawaves R.F.C.) was the first club in the history of Japanese rugby to win the All-Japan Rugby Football Championship seven times in a row. The team was the pride and hope of not just prefectural and city residents, but rugby fans all over Japan. The players who have inherited this glory overcame the difficulties of the 2011 disaster, and are continuing to shoulder local hopes for the future and create new legends.

The iron and steel industry flourished in Kamaishi for a long time. On January 15, 1858, steel was successfully continuously manufactured in the city using a Western-style blast furnace for the first time in Japan, and from the late Edo period (mid 1800s to 1867) to the Meiji period (1868-1912) the city supported the modern iron and steel industry. The biggest steel works at the time, the Hashino Iron Mining and Smelting Site was named as a Site of Japan's Meiji Industrial Revolution and became a UNESCO Cultural World Heritage Site in July 2015.



*The remains of the 3rd blast furnace at the Hashino Iron Mining and Smelting Site, a UNESCO Cultural World Heritage Site

Kamaishi Recovery Memorial Stadium (tentative name)

Kamaishi Recovery Memorial Stadium (tentative name) is the only new stadium in the 12 host cities that will be built to host the Rugby World Cup 2019. The stadium is to be built on the former site of the Unosumai Elementary School and Kamaishi East Junior High School that were destroyed in the 2011 Tohoku earthquake and tsunami, and relocated to safe higher ground. The ground level has been raised by five meters, and construction work is under way to have the stadium complete by July next year. The location is known around the world as an example of effective disaster prevention, as children and pupils took the initiative and evacuated to higher ground during the disaster, saving many lives. With 16,000 seats (6,000 permanent seats and around 10,000 temporary seats) it is the smallest of the stadiums that will be used, but it will welcome visitors from inside and outside Japan with typical Iwate and Kamaishi hospitality. The Fiji, Uruguay, Africa 1 and the Repechage winner teams will play in the pool matches held at the stadium.

Plan to Invigorate the Local

Kamaishi City, a city with a strong rugby history, was completely devastated by the 2011 tsunami. Hosting the Rugby World Cup 2019 in Kamaishi City is an excellent opportunity to rebuild and show gratitude for the support received from all around the world during the 2011 Tohoku earthquake and tsunami, and to show how the city has recovered.

The city will play a big role in helping the name "KAMAISHI", the city of rugby, be remembered by the people who visit and others all around the world, further develop the local area, and pass on the many legacies that will be created when the Rugby World Cup 2019 is held to the next generation.



*The Tugboat Festival, a spectacular festival distinctive of the coastal city



*Artist's impression of the completed Kamaishi Recovery Memorial Stadium (tentative name)

Area Through the World Cup

Main Programs

"Preparing a stadium that will be loved in the area for many years to come"

As there are no large-scale sports facilities capable of hosting international sports events in Kamaishi, new facilities had to be created.

The Unosumai Sports Park, where the stadium is located, was designed as a hilly landscape in the shape of a rugby ball, and includes a rest area looking over the river and park, and a green hill that can also be used as a viewing spot during events.

These features have been designed with Kamaishi's future in mind, and as well as making it a financially sustainable facility, many uses for the park after the Rugby World Cup 2019 have also been envisaged. While the facility can hold large-scale events, it has also been designed to be a park that will be loved for many years as a community area that local residents can use on a daily basis.



Artist's impression of the completed Unosumai Sports Park

Vision for how the Unosumai Sports Park / Kamaishi Recovery Memorial Stadium (tentative name) will be used

A stadium people will want to visit	A stadium that will attract people not just from Japan, but from other countries through hosting international matches
A stadium that invites participation	A stadium that provides opportunities for people from all generations to participate, that people will want to actively be involved in
An unforgettable stadium	An unforgettable stadium that will remember those lost in the tsunami and symbolize the recovery

Attracting inbound visitors using ICT technology

Informative devices that contain multilingual interpreting and translation applications are being prepared to guide foreign visitors through cooperation between the Kamaishi Tourism Volunteer Guide Association, which is made up of local volunteers centered around the Kamaishi Tourism Association, and private business owners, and work is being done with residents to improve guidance for inbound visitors and make environmental improvements to improve transportation access.

Furthermore, by installing electronic guides that can display information in multiple languages in tourist spots and commercial facilities, to improve guidance for inbound visitors, the city will make their visit more convenient and satisfying, as well as create circular synergy through mutual guidance between facilities that will help create an environment that effectively conveys the appeal of the local area.



Toramai (Tiger Dance), a form of Kamaishi City Folk Entertainment

Kanagawa Prefecture, Yokohama City

Overview

Profile of Kanagawa Prefecture, Yokohama City

Yokohama, which will host the Rugby World Cup 2019™ final, has served as a gateway to the world since the port was opened to foreign trade at the end of the 19th century, building a history of economic and cultural exchange, driving Japan's modernization and becoming a flourishing international city. Yokohama has developed into Japan's largest city after Tokyo, with an economy as large as Hungary or New Zealand and a population of more than 3.7 million.

Yokohama also boasts many famous neighbors in Kanagawa Prefecture, including Kamakura, Odawara, and Hakone. Kamakura, where Yoritomo Minamoto launched the shogunate at the end of the 12th century, reached its zenith in the 13th century as the political, military, diplomatic, and cultural center of the country. Even today, the shrines and temples of Kamakura testify to its distinguished history and rich cultural legacy from those prosperous times.

Cup final to be held at International Stadium Yokohama

International Stadium Yokohama (ISY) can claim a distinction that few other sports venues can: in 2019, it will have hosted the world's three biggest sporting events, the Olympics, the FIFA World Cup, and RWC.

The New Zealand, South Africa, Ireland, Scotland, England, France and Japan teams will meet in ISY for pool matches. The semi-finals and final match will also be played here.

ISY is accessible from Shin-Yokohama Station of JR Tokaido Shinkansen, JR Yokohama Line and the municipal subway lines (12-14 walk) and a 10 minute walk from JR Kozukue Station. It is within easy reach of shopping, dining, and tourist attractions. ISY also has the highest capacity of any sports facility in Japan, with about 72,000 seats. It features roof covering for three-quarters of its seats, and its two giant screens on either side of the field and around 528 speakers offer fans a close-up view of the action no matter where they sit.



Regional vitalization plans

Plan overview

Kanagawa Prefecture

"Rugby World Cup 2019™ and Tokyo 2020 Olympics and Paralympics Promotion Kanagawa Program"
Kanagawa has created the following program for leveraging the opportunity of these sporting events to contribute to a successful Rugby World Cup 2019 and Tokyo 2020 Olympics and Paralympics, as well as communicate the attractiveness of Kanagawa and generate excitement from Kanagawa for the events.

Kanagawa program for RWC2019

Kanagawa-style hospitality

Enhancing Kanagawa's appeal as an international tourist destination

The cultural charm of Kanagawa

Promoting sports through the tournament

* Excerpted from "Rugby World Cup 2019™ and Tokyo 2020 Olympics and Paralympics Promotion Kanagawa Program"

Yokohama City

"Yokohama Vision for Rugby World Cup 2019™ and Tokyo 2020 Olympics and Paralympics"

- Yokohama taking another great leap forward and creating a legacy -

Yokohama has formulated a basic approach, program pillars and program legacy for these sporting events to tell the world about the attractiveness and dynamism of Yokohama by capitalizing on the great chance presented as the world focuses on the two global sporting events of the Rugby World Cup and the Olympics and Paralympics to be held in consecutive years. The Four Pillars of the Program are:

Four pillars of the program

Yokohama-wide hospitality campaign for successful Olympics, Paralympics and RWC

A healthier Yokohama through sports

Community-building using the creativity of arts and culture

Introducing the world to Yokohama's charm

* Excerpted from "Yokohama Vision for Rugby World Cup 2019™ and Tokyo 2020 Olympics and Paralympics"

linked to the tournament

Kanagawa Prefecture,
Yokohama City

Main programs

Kanagawa 1000 Tours for Rugby World Cup spectators

The Kanagawa Prefecture Tourism Appeal Creation Committee, which was established in June 2016 and has 52 member organizations, is bringing local governments, companies, and organizations together to plan and commercialize 1000 diverse excursion tours to encourage Cup spectators to sightsee throughout the prefecture.

In addition to existing tourist destinations, the committee is also discovering and developing new tourism resources throughout the prefecture that are not listed in travel guides, and holding talks to create model routes and commercialize the tours.

These tourism resources and model routes will be promoted to a global audience through the prefecture's foreign-language tourism information website "Tokyo Day Trip – Kanagawa Travel Info."

All of Kanagawa will work together to continue promoting the tourism appeal of Kanagawa to rugby fans around the world, so that the many "spectators" coming to Japan can be converted to "tourists" traveling throughout the prefecture.

* Enhancing Kanagawa's appeal as an international tourist destination

Attracting tourists

"Planning and commercializing excursion tours around the prefecture"



Yokohama Volunteer project for "Only in Yokohama" hospitality

In 2017, Yokohama established the Yokohama City Sports Volunteer Center to support ongoing sports volunteer activities. The center recruits and registers volunteers, and provides information on major sporting events in the city like the World Triathlon Series Yokohama to make people more familiar with volunteering. It also sponsors skill-building classes and workshops to help more people get actively involved in sports volunteering activities.

Yokohama City will collaborate with the Yokohama Sports Volunteer Center so that those volunteers who support hospitality efforts during the tournament can leverage that experience to go on and contribute to the Olympics and Paralympics and beyond.

* Yokohama-wide hospitality campaign for Olympics and Rugby World Cup

Training/using volunteers to give visitors a warm welcome

"Training/using city volunteers"



Yokohama Promotional videos of Yokohama on CNN website

Yokohama is using the opportunity of hosting a large-scale sporting event to conduct an overseas promotional campaign aimed at raising interest in the city and enhancing urban planning to attract future visitors. In 2016, the city launched 15-second promotional videos on CNN's website and Instagram to give viewers a real sense of Yokohama's appeal as the host of the RWC2019 final match.

Yokohama will continue its efforts to use the tournament as an opportunity to convey the many aspects of its appeal: as an artistic and cultural city, a future city, an international city, and a business-focused city.

* Introducing the world to Yokohama's charm

Building a visitor-friendly community by enhancing inbound support, etc.

"Deploying city promotional campaign"



Kumamoto Prefecture, Kumamoto City

Overview

Profile of Kumamoto Prefecture, Kumamoto City

Kumamoto is blessed with beautiful natural vistas and rich history and culture, including the ancient grasslands of Aso; the cultural heritage sites of Manda, Misumi Nishiko, and Sakitsu; and the UNESCO-recognized Yatsushiro myoken festival. The famous “red brand of Kumamoto” symbolizes the bounty of its seas, fields, and pastures, including tomatoes, watermelons, Aso cattle, and tiger prawns. On April 14 and 16, 2016, two powerful earthquakes shook Kumamoto, claiming many lives and causing widespread building collapses and landslides. Today, the residents of Kumamoto are coming together in creative ways to recover. One milestone of the recovery will be hosting RWC2019 and the 2019 Women’s Handball World Championship, and they are working hard to make these events a success.

Kumamoto Stadium

This stadium hosted a match in June 2017 between the Japan and Romania national teams to support earthquake recovery efforts. 18,585 fans filled the stands to see the match, the first match the Japanese team had played in Kumamoto. The stadium has won high marks from players and tournament executives alike; Michael Leitch, the captain of Japan in RWC2015, said the quality of the pitch was the best the team had ever played on.

The France, Tonga, Wales and Uruguay teams will meet in Kumamoto for pool matches.

KUMAMOTO Free Wi-Fi

The prefectural government is teaming up with major transportation hubs and other public facilities to launch “KUMAMOTO Free Wi-Fi,” a free wireless Internet service that will be widely available to users in public areas.



Regional vitalization plans

Plan overview

Four lines of effort

Projecting an image of recovery from the earthquakes

Promoting and popularizing sports

1. Making this international sporting event a success and attracting camps for the Tokyo Olympics/Paralympics
2. Cultivating top athletic talent from Kumamoto to be successful in Japan and globally
3. Creating an environment where everyone can enjoy sports all their lives

Promoting inbound tourism

1. Attracting returning visitors and FITs*1
2. Developing and firmly establishing sports tourism

*1 International independent tourist: individual travelers who are not part of group or package tours

Promoting international exchange

1. Promoting direct exchange with national teams visiting Kumamoto
2. Creating convenient opportunities for visitors to come into contact with Kumamoto culture

* Excerpted from “Legacy program: Kumamoto hello program”

linked to the tournament

Main programs

Creative restoration of damaged facilities and upgrading to international standards

In the aftermath of the earthquakes, Kumamoto Stadium was used as a base for storing and distributing emergency food supplies, while serving for over three months as an evacuation spot for residents. The stadium itself also suffered partial damage and needed repairs. Under the “creative restoration” concept outlined in its “Plan for restoration/recovery from the Kumamoto earthquake,” the prefectural government is working to repair and upgrade the facility so that it can successfully host international matches. Specific upgrades include installing new 17-meter goalposts, updating and adding training gym equipment, renovating locker rooms, refurbishing the anti-doping room, installing brighter stands lighting, adding a second big screen, and refurbishing some of the spectator seats.

* Promoting and popularizing sports

Creating an environment where everyone can enjoy sports all their lives

“Creative restoration and modernization of damaged sports facilities, upgrade to international standards with universal design in mind”



Kumamoto Stadium and its 17-meter poles

Kyushu united in promoting inbound tourism through the tournament

Three prefectures in Kyushu – Kumamoto, Fukuoka, and Oita – will host tournament matches. To encourage fans to stay on and tour the island, the Kyushu tourism promotion organization is working with local governments to plan, develop, and promote integrated tours of sightseeing spots in neighboring prefectures. To foster momentum and more effectively publicize the tournament, governors and mayors from the three host prefectures held a joint meeting and adopted a “Declaration for a successful hosting of Rugby World Cup 2019 in Kyushu.” As one example, the three prefectures are working together to use their extensive contact with nearby Asia to attract visitors from Asia and other parts of the world, and to build out transportation networks linking the prefectures and their cities together.

* Promoting inbound tourism

Attracting returning visitors and FITs

“Developing tourist resources to meet diverse needs, developing and promoting excursion routes linking prefectures across Kyushu”



Meeting of governors and mayors from Kyushu's three host sites for Rugby World Cup 2019™

Enhancing hospitality with a barrier-free mindset

Accommodating large numbers of special-needs travelers and ensuring their satisfaction requires enhancing hospitality with a “barrier-free” mindset. For example, in addition to hospitality classes to help inn and restaurant staff serve international visitors better, e-learning and book-based training in English and intercultural understanding will be offered for individuals, group, and companies. Diverse options are also available to help improve hospitality for people with special needs, such as sport specific activities, virtual experiences, and support for cultural activities like art brut exhibitions. Information on barrier-free services around venues and tourist areas will also be collected and disseminated.

* Promoting international exchange

Promoting direct exchange with national teams visiting Kumamoto

“Deepening understanding of global diversity”



Hospitality classes held in prefectures

