

Whale Watching and Dolphin Watching in Japan

August 2016

NPO Japan Ecotourism Society

Foreword:

In 2009, the International Fund for Animal Welfare (IFAW) published a special report titled “Whale Watching Worldwide”. Around 7 pages in the report were devoted to fact-finding research about whale watching in Japan. 7 years since then, this year’s report will update the data on whale watching in Japan through fact-finding research by visiting 80% of the localities mentioned in this report and conducting interviews with relevant local players such as whale watching associations, unions, and businesses. These interviews will allow us to gain detailed and accurate knowledge of the current situations in whale watching localities.

The aftereffects of the 2011 East Japan Earthquake and 2016 Kumamoto Earthquake are still being felt by some whale watching localities, with numbers of whale watching participants lower than pre-earthquake levels in 2009. On the other hand, some localities have seen large increases in whale watching participants and sales in the past decade.

This report focused on addressing these points in the interview hearings:

- ① Number of businesses
- ② Number of passengers
- ③ Changes in the customer base
- ④ Price of whale watching or dolphin watching tour
- ⑤ Sales
- ⑥ Number of employees
- ⑦ Income of employees

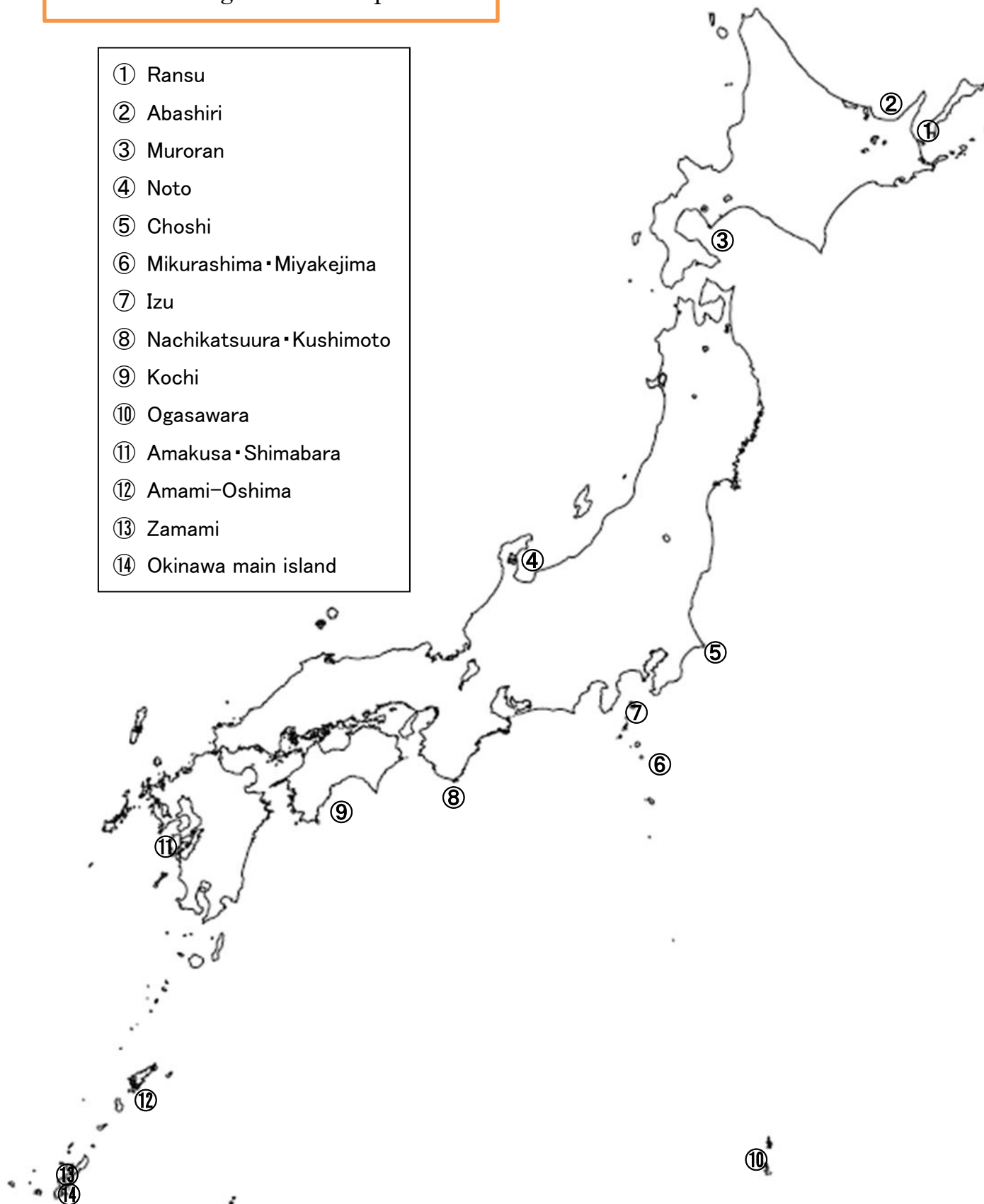
Additionally, upon conducting the local interviews, we were informed about the recent history, issues, and future plans by our interviewees.

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Localities offering whale/dolphin
watching tours in Japan

- ① Ransu
- ② Abashiri
- ③ Muroran
- ④ Noto
- ⑤ Choshi
- ⑥ Mikurashima • Miyakejima
- ⑦ Izu
- ⑧ Nachikatsuura • Kushimoto
- ⑨ Kochi
- ⑩ Ogasawara
- ⑪ Amakusa • Shimabara
- ⑫ Amami-Oshima
- ⑬ Zamami
- ⑭ Okinawa main island



Japan overall:

It is thought that whale watching in Japan first started in the 1980s. Since then, the number of whale watchers has steadily increased throughout the 1990s and 2000s. In the 2010s, due to the effects from the East Japan Earthquake and the Kumamoto Earthquake, the number of whale watchers as well as sales related to whale watching has decreased in some localities, remained unchanged in other localities while increasing in other localities.

The overall trend in the number of localities involved in whale watching and related whale watching businesses is increasing, for instance Amami-Oshima is a locality that has recently begun involving itself in whale watching while other localities and businesses have been forced to shut down due to ageing captains as well as a decrease in the number of whale watchers. The overall statistics of whale watching in Japan is shown below.

Year	Number of Businesses	Number of tour participants	Total sales	Number of workers
1998	102,785	45	560 million yen (approximately)	unknown
2008	191,970	104	740 million yen (approximately)	unknown
2015	233,627	148	910 million yen (approximately)	189

As is shown above, there is an annual increase by 20% in the number of whale watchers, 40% for whale watching businesses, and 20% for annual sales. These figures suggest that whale, dolphin watching (including swimming with dolphins) are in an upwards trend, however in the most recent survey, there were few survey results from whale watching localities and businesses in Okinawa Prefecture and combined with the overall atmosphere of the survey hearings conducted in that prefecture, it is more realistic to assume that the trend is horizontal or incrementally increasing.

- Significant effects from natural disasters:

Upon conducting survey hearings across the various localities, the effects from the Great East Japan Earthquake of 2011 were brought up as a topic of discussion by almost all localities. Even amongst the localities that did not bring it up as a topic of discussion, many had a low performance in numbers of customers and sales during 2011. There were also opinions that during this time, there was a significant decrease in consumer appetite for tourism, as well as an overall decrease in interest in marine recreation that were to blame for the low performances since 2011.

Additionally, there was the opinion that the Kumamoto earthquake of 2016 significantly affected the major dolphin watching areas of Amakusa and Shimabara, and although there has been a small recovery, the effects there are still being felt.

- Changes over the past few years in the customer base:

Another common topic brought up during the survey hearings was the “changing customer base” of whale watchers. In recent years, Japan has been making efforts in bringing in foreign tourists, with figures approaching twenty million in 2015. In this year’s survey hearings as well, there were numerous views expressed such as “the number of foreign visitors are increasing” or “roughly one third of whale watching passengers are foreign visitors” and so on and indeed, our surveyors saw first hand, many foreign tourists participating in whale watching voyages. There was also the view that amongst foreign visitors, the Germans, British and French are the most interested in whale watching and dolphin watching.

- Incomes of workers:

At present, the most commonly discussed topic within the whale watching industry, as well as the eco-tourism industry as a whole in Japan, is the issue of income. Eco-tourism workers employed as guides in various localities across Japan receive an overwhelmingly low income

when compared to other professions as well as to their foreign peers.

Due to this, there are few people who are interested in becoming eco-tourism guides, while people with strong interests in nature or marine life who may be interested in working as eco-tourism guides are few and far between, exacerbating the lack of manpower within the industry. In this year`s survey hearings, we put an effort into collecting data on income, believing it is important for the continued development of the whale watching industry.

The survey found that the highest level of income was a 3.2 million yen salary or a monthly wage of roughly 130,000yen to 150,000yen, (in many instances, room and board is included in this figure) while the lowest level of income was an 80,000yen monthly wage in some places.

As stated previously, the survey conducted this year showed that there are localities where the numbers of visitors and sales are increasing, remains unchanged, or has decreased to one-tenth of peak levels; details follow.

1. Ransu (Hokkaido)

Year	Number of Businesses	Number of tour participants	Total sales	Number of workers	Monthly wage
2008	3	6,380	unknown	unknown	unknown
2015	5	19,709	120 million yen (approximately)	15 (approximately)	130,00 yen ~160,000 yen

Whale watching in Ransu began relatively recently, around ten years ago. Killer Whales and Sperm Whales can be sighted a short voyage from the harbor, contributing to Ransu's status as the fastest growing whale watching spot in Japan.

Total number of passengers on tour boats leaving Ransu

観光船乗客数 合計

Year

Month		2006年度	2007年度	2008年度	2009年度	2010年度	2011年度	2012年度	2013年度	2014年度	2015年度
	4月		11	288	128	100	221	299	68	61	42
	5月		74	423	661	750	1,079	1,019	968	1,257	1,560
	6月		316	615	580	900	988	1,654	1,502	2,450	3,147
	7月		355	1,252	1,370	1,850	2,879	3,665	3,664	3,857	5,367
	8月		1,225	2,300	2,329	4,900	5,091	7,390	7,907	7,142	6,739
	9月		577	1,332	1,157	1,750	1,907	2,460	2,121	2,585	2,659
	10月		94	170	194	450	289	507	361	403	175
	11月		24	-	-	-	-	-	43	22	20
	12月		0	0	-	-	-	-	30	0	0
	4~12月合計		2,652	6,380	6,419	10,700	12,454	16,994	16,664	17,777	19,709
	4~12月前年比			240.6%	100.6%	166.7%	116.4%	136.5%	98.1%	106.7%	110.9%

(Ransu Town Tourism Association)

KEY:

yellow highlighted box= total number of passenger from April to December

blue highlighted box= % change in numbers of passengers compared to previous year

Whale watching season:

Whale watching season in Ransu usually is from the end of April through to early October. Most whale watching businesses offer bird watching voyages during the winter, however whale-watching voyages during the summer months bring in four times as many passengers.

Whale watching style:

Ransu`s whale watching businesses possesses 4 relatively large tourist boats, each with a capacity of 50-60 passengers. Normally, there are two voyages per day, one before noon and one in the after noon. (Adult fare is 8,000yen) The waters off Ransu are relatively calm, allowing most voyages to take place as scheduled.



(Whale watching scene in Ransu, 2016)

Chances of encountering whales:

In Ransu, it is possible to see many different species of whales after only a short voyage from the harbor, which is unique amongst whale watching spots. Ransu also has parks, as well as a park on a hill from which it is possible to

view whales. (A similar park exists on Chichijima and Hahajima in Ogasawara Islands.)

A table showing the probability of encountering whales is below;

Probability of encountering whales in Ransu

Month

月	1月	2月	3月	4月	5月	6月	7月	8月	9月	10月	11月	12月
統計シーズン数	6	6	6	6	6	6	6	6	6	6	6	6
想定イベント	(連休)	流氷期	流氷期	整備							連休	連休
オオワシ		●	●									
オジロワシ		●	●	△								
ミスナギドリ類				○	●	●	●	○	△	△		
トド												
ゴマフアザラシ		△	○									
クラカケアザラシ					△							
オットセイ												
マッコウクジラ						△	◎	●	●	○		
ツチクジラ		△				△	△	△	△	△		
ミンククジラ						△	△	△	△	△		
イシイルカ				△	◎	●	●	●	●	●		
ネズミイルカ												
カマイルカ												
シャチ				○	○	○	△					

期待度の目安！

- 発見率70%以上 >70% chance
- ◎ 発見率50～69% 50～69% chance
- 発見率30～49% 30～49% chance
- △ 発見率10～29% 10～29% chance
- 発見率10%未満 (1, 11, 12月は「情報不足」です) <10% chance (data missing for Jan, Nov, Dec)

作成: Hal Sato, SLW (2006年～2010年データまで)

(Shiretoko Nature Cruise)

KEY:

second row from top: combined number of seasons

third row from top: status of tours

(January, November, December: tours closed, February & March: ice floe, April: preparation)

far left hand column: species of animals encountered

(species from top to bottom: Steller`s sea eagle, White-tailed sea eagle, Shearwater, Steller`s sea lion, harbor seal, fur seal, sea otter, sperm whale, Baird`s beaked whale, Minke whale, Dall`s porpoise, porpoise, Pacific white-sided dolphin, Killer whale)

Changes in customer base:

As mentioned earlier, Ransu has seen a steady increase in the number of whale watchers. As in other localities, the number of whale watchers from abroad has been increasing remarkably. Foreign tourists make up 30% of the passengers on winter voyages, and regarding whale watching as well, the ratio of foreign tourists is increasing, and this trend is continuing throughout 2016.

Whale watching's effect on local economy:

Ransu is inside Shiretoko National Park, and ever since the National Park was registered as a UNESCO World Heritage site, expanding the tourism industry in this town of 5,300 has become a necessity. Recently, according to statistics collected by Ransu Town in 2014, tourists numbered 520,000 per year. Out of these, 64,000 tourists stayed over night in Ransu, meaning the remaining 90% of tourists came only for day trips. Generally speaking, tourists on day trips spend little money and in many instances contribute little to the local economy. However out of these tourists, 20,000 whale watchers are included, and presuming that each spends at least 6,500yen for a voyage, they generate 130 million yen in sales annually for the local economy. This figure is roughly the same as what 14,000 over night tourists would generate annually, based on the national average of 9,250yen per night spent by tourists on over night accommodation. Thus, it can be said that whale watching contributes relatively more to the local economy than other tourist activities.

Employment figures and pay:

In Ransu, the main whale watching businesses hire crew other than a captain on their boats. The number of businesses is not many, compared to other localities, yet the value of these businesses is that they offer employment opportunities for young people. Additionally, the level of income for workers is high compared to other localities regardless of whether the worker is qualified in the operation of tourist boats, and in one case, a non qualified worker makes 3 million yen per year.

Future plans and issues:

This year's survey hearings showed that in terms of numbers of tourist boat passengers, sales, and worker income, Ransu saw the highest growth in the country. Whale watching businesses in Ransu cooperate with one another,

and there is no conflict between businesses or with the locality, as is sometimes the case, and because of this cooperation, the chances of encountering a whale are increasing.

Although currently not an issue, gathering more tourists is the key for continued success in Ransu. The Shiretoko region includes the two towns of Utoro and Ransu, with the majority of tourists to the region visiting Utoro. For instance 1.14 million tourists visited Utoro, while 520,000 tourists visited Ransu in 2014, or in other words, Utoro received around double the number of tourists than Ransu. Regarding over-night tourists, Utoro has a concentration of large-scale resorts, drawing in 410,000 guests compared to 64,000 guests in Ransu. The disparity in number of over-night guests between the two towns has thus increased to 6.4 fold. Additionally, there are 40 individuals offering optional tours in Utoro, more than in Ransu. As mentioned earlier, the benefit of whale watching on the local economy of Ransu is that the amount of money spent by one tourist on one whale watching voyage is roughly equal to the amount spent by one over-night guest. With even more cooperation with Utoro, (there is already cooperation with a number of tour businesses and hotels in Utoro) it is hoped that whale watching businesses in Ransu can expand further, (existing businesses acquiring more boats or an increase in number of businesses) ultimately leading to an increase in numbers of workers as well as an increase in income.

2. Abashiri and 3. Muroran (Hokkaido)

Year	Number of Businesses	Number of tour participants	Total sales	Number of workers	Monthly wage
2008	Unknown	Unknown	Unknown	Unknown	Unknown
2015	3	Unknown	Unknown	Unknown	Unknown

1. Number of whale watching businesses in Abashiri and Muroran:
Abashiri: 1
Muroran: 2
2. Total annual passengers:
Unknown
3. Number of workers:
Unknown
4. Whale watching season:
Abashiri: April~October
Muroran: May~August
5. Recent History:
Abashiri: whale watching began in 2008
Muroran: there has been an increase of 1 whale watching business since 2012
6. Whale watching style and price:
Abashiri: 8,000yen per adult
Muroran: 6,000yen per adult
(boats consist mostly of small recreational fishing vessels)
7. Uniqueness of Muroran • Abashiri:
A relatively wide variety of whale species can be seen in both localities.
8. Future potential and issues:
Depending on the business, some have seen a decrease in number of participants, while others have seen an increase, and there were no particular concerns that were mentioned during the survey hearing.

4. Noto (Ishikawa)

Year	Number of Businesses	Number of tour participants	Total sales	Number of workers	Monthly wage
2008	Unknown	Unknown	Unknown	Unknown	Unknown
2015	14	around 20,000	around 40 million yen	around 20	Unknown

1. History of Dolphin watching in Noto:

Dolphin watching in Noto began in 2008, which we found out during our survey for that year. Within the next decade, there was a great increase in dolphin watching, and now, dolphin watching businesses in Noto boast a fleet of 12 vessels as well as 2 businesses that offer activities such as swimming with dolphins.

2. Current situation:

Dolphin watching cruises mainly depart from Noto Island, and in 2015 there were 20,000 passengers participating in Dolphin watching cruises. The average price for a dolphin-watching cruise is around 2,000yen per adult.

3. Significant increase in numbers of tourists in the area:

Noto Island is relatively close to cities such as Kanazawa and Toyama, both of which are seeing more tourist visitors due to the convenient and fast access provided by the recently opened Hokuriku Bullet Train. Some dolphin watching businesses have seen a 30% increase in visitors compared to the previous year.

4. Price of dolphin watching cruise:

The price for a dolphin-watching cruise with durations of 1 to 1.5 hours is around 2,000yen to 3,000yen per adult. Some businesses have very quick

turn around between cruises and offer up to 7 cruises per day. The majority of dolphin watching boats are fishing vessels with a capacity of around 10 passengers.

5. Issues:

Although the number of participants in dolphin watching is increasing significantly, there are still some issues. Dolphins that can be seen off Noto are Indo-Pacific Bottlenose Dolphins, and the pod of 11 is frequently sighted far from the coast, lowering the chances of encountering them on a cruise.

5. Choushi (Chiba)

Year	Number of Businesses	Number of tour participants	Total sales	Number of workers	Monthly wage
2008	Unknown	Unknown	Unknown	Unknown	Unknown
2015	1	4,000	Unknown	Unknown	Unknown

1. Number of dolphin watching businesses:

1

2. Total annual passengers:

Around 4,000 people

3. Number of workers:

2 full time employees, 2 civil servants

4. Recent history and current issues:

The first cruise business was set up in 1998. Various activities such as dolphin watching whale watching, sunset cruises are run by the tourist boat businesses in Choushi.

The most pressing issue at present is the lack of increase in the number of dolphin watching participants. It has been 18 years since the first business was set up, yet Choushi remains relatively little known as a dolphin-watching locality. With this in mind, dolphin watching workers from the younger generation are actively using social media and blogs to create public awareness for Choushi as a tourist destination. Advertisements on travel websites such as “Jyaran” (じゃらん) are costly and not an option.

Additionally, business has not recovered to pre-2011 earthquake levels and is still around 70% of pre-2011 levels. This is true for Choushi as a whole. Choushi has other tourist attractions such as a Geopark and a Japanese cultural heritage site, which are promoted by the local government just as much as it promotes dolphin watching. A cruise that the local government is creating that incorporates visiting the Geopark and Japanese cultural heritage site will hopefully bring in more dolphin watchers as well.

5. Other relevant points:

24 species of whales and dolphins have been confirmed as sighted off the shores of Choushi. Another attraction is that there is no off-season and it is possible to see whales, dolphins and fur seals year round. Choushi is located at the southernmost point for fur seals migrating south during winter. Along the coast, many Indian Porpoises can be spotted, and there are thought to be around 200 to 300. Some of the porpoises in the pod are rearing their young, a sight which may bring in more tourists.

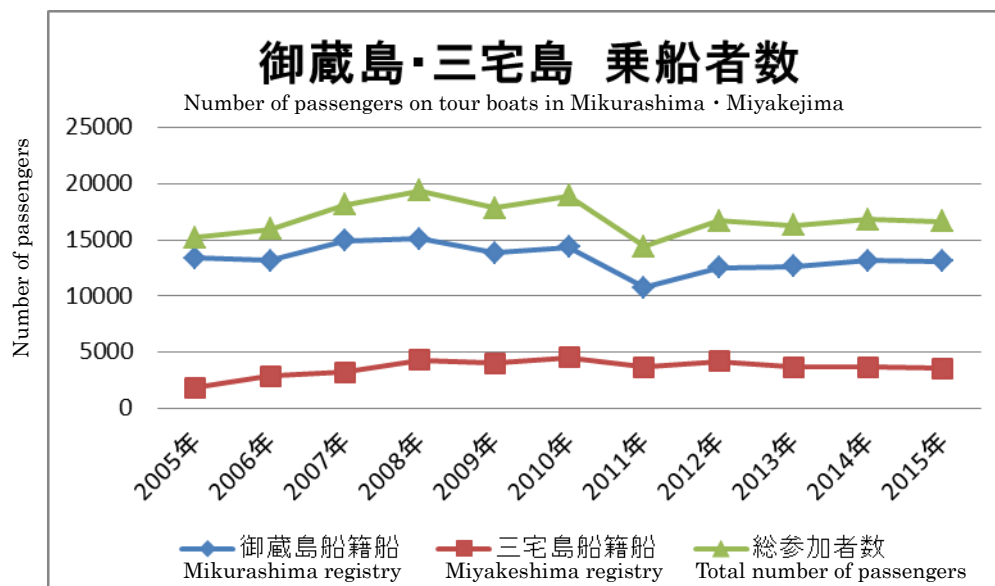
6. Mikurashima • Miyakejima (Tokyo)

Year	Number of Businesses	Number of tour participants	Total sales	Number of workers	Monthly wage
2008	Unknown	19,372	Unknown	Unknown	Unknown
2015	25	16,619	130 million yen (approximately)	50~60	80,000yen ~ 110,000yen

Mikurashima and Miyakejima are two isolated islands administered by Tokyo. They are roughly 200 km from mainland Tokyo, and while being readily accessible from Tokyo by ferry or helicopter, it is difficult to say that this has closed the distance between them. Dolphins reside in the waters off Mikurashima, yet Miyakejima is very close by, and dolphin watching cruises depart from both islands. Dolphin watching season runs from April to early-November.

1. Numbers of passengers on dolphin watching cruises:

There is a local ordinance on Mikurashima that obligates dolphin watching and dolphin swimming businesses to obtain a license and disclose passenger numbers. As a result, there are very detailed figures available, as is shown below.



2. Rules for Dolphin swimming on Mikura and Miyake Island:

The rules issued by the localities are the following;

Rules and Manners:

In order for dolphins and humans to maintain a good relationship, some voluntary rules have been established. Participants in dolphin swim tours are urged to follow the voluntary rules.

- Do not interfere with feeding, mating, birthing and other natural activities of the dolphins.
- Do not approach pods that have young dolphins.
- Do not attempt to approach pods of dolphins that do not approach human swimmers.
- Do not touch or attempt to touch the dolphins.
- Do not feed the dolphins.
- Do not approach dolphins while scuba diving.
- Refrain from using whistles and diving computers or any other equipment that emits artificial sounds.
- When taking photos underwater, do not use a flash.
- Do not take photos using selfie-sticks.

(Mikurajima Tourism Association)

3. Business operating method:

There are differences in operating methods, price and types of boat between dolphin swim tours on Mikurashima and Miyakejima.

	Business operation	Type of boat	Price per adult
Mikurashima	Dolphin swim tours run as main business	Most are small fishing vessels	7,300y~9,000yen (7,500yen is the most common)
Miyakejima	Dolphin swim run as an optional attraction by Scuba Diving businesses	Most are medium-sized motor yachts used for Scuba diving tours	14,000yen

4. Current situation of dolphin watching industry workers:

There are estimated to be 50 to 60 individuals, including business owners involved in dolphin watching and swimming with dolphins on Mikurashima and Miyakejima.

The situation of worker`s pay on Mikurashima is shown below;

Company A: 100,000 yen per month (room and board, heating and lighting are paid for by the employer, and there are bonuses during peak tourist seasons)

Company B: 80,000 yen per month (room and board paid for by the employer)

Company C: A worker receives a wage of 3,500 yen per cruise

Company D: A worker receives a wage of 5,000 yen per cruise

Company E: A worker receives a wage of 3,000 yen per cruise (Guides who have worked for over four years receive an additional 4,000 yen per cruise)

Company F: Including pay for hours worked at the site of accommodation, 110,000 yen per month (room and board, lighting and electricity, food paid for by employer as well as an annual 40,000 yen stipend for transportation to and from the island, an annual bonus of 50,000 yen ~ 100,000 yen depending on sales during peak tourist season, and a yearly increase in annual pay by 10,000 yen)

Company G: 140,000 yen including pay for hours worked at the site of accommodation (room and board, lighting and electricity and food paid for by employer)

Most guides have two jobs, also working at their place of accommodation, which tend to be small family run hotels, or at local restaurants. It is apparent that the pay for guides on Mikurashima is low.

5. Future plans and issues:

There are thought to be two main issues.

- ① Income of dolphin watching workers, business owners.
- ② Friction between localities.

① Income:

The results from the survey hearings on Mikurashima have been described above in detail through surveys of Companies A to G. An additional point is that most of the guides are young and tend to return to the mainland off-season, and for the interest of increasing the migration of young people to an island with a rapidly aging population, increasing their income is urgent.

② Friction between localities:

Although this is true for the Izu Islands (of which Mikurashima and Miyakejima are part of) as a whole, there is a history of bad relations between Mikurashima and Miyakejima. Many localities with friendly relations cooperate with each other in business and promotion, yet between these two islands, there is no such cooperation. It is urgent

that the two islands establish a cooperative relationship in order to attract larger numbers of dolphin watchers.

7. Ito (Shizuoka)

Year	Number of Businesses	Number of tour participants	Total sales	Number of workers	Monthly wage
2008	1	Unknown	Unknown	Unknown	Unknown
2015	1	300	Unknown	1 Family	Unknown

1. Number of dolphin watching businesses:

1

2. Total annual passengers:

Around 300 people (tours take place year round)

The first dolphin watching tours had around 2,000 visitors annually, however after the 2011 earthquake and tsunami, the public's perception of the ocean increasingly became associated with disaster and fear, decreasing demand for dolphin watching tours offered by tour agencies. For instance, many students on school field trips used to participate on dolphin watching cruises, while now there are very few who do.

3. Number of workers employed in dolphin watching businesses:

A married couple runs the 1 business in Ito.

4. Recent history and current issues:

Whale watching in Ito began in 2002, and chances for spotting whales are around 60% per cruise. These chances increase to around 80%~90% during November to March. The main issue is what to do when no whales are spotted. It is possible to see Mt. Fuji from a cruise, so when there is no whale sighting, tourists have the opportunity to enjoy the view of Mt. Fuji

and Izu National Park instead. However, the couple feels that more needs to be done to keep tourists happy. (Cruises take place on fishing vessels leased to them by local fishermen)

8. Wakayama Prefecture

Year	Number of Businesses	Number of tour participants	Total sales	Number of workers	Monthly wage
2008	Unknown	Unknown	Unknown	Unknown	Unknown
2015	4	around 1,000	around 6 million yen	around 10	Unknown

1. Number of whale, dolphin watching businesses:
Nachikatsuura Town: 2
Kushimoto Town: 2
2. Total annual passengers:
Around 1,000 people
3. Number of workers employed in whale, dolphin watching businesses:
Around 10 (including business owners)
4. Whale, dolphin watching season:
Varies by business, generally from late March to end of September
5. Recent history:
First starting in 1990, whale, dolphin watching in Wakayama has the longest history out of all localities in this survey hearing. Although some businesses were set up as recently as 2000, all workers have a career in the industry of at least ten years.
6. Business up until now and recent trends:

In general, the peak in numbers of tourists was in the late 1990s, with 1.5 times more tourists than there are now. Ever since this peak, numbers have declined and have steadied in recent years.

Many business owners and workers feel that the 2011 East Japan earthquake and tsunami led many tourists away from maritime recreational activities due to fears of a recurrence of the disaster.

Many businesses also run scuba diving tours. A recent trend is the increase in numbers of foreign tourists coming not only from Asia but also from the rest of the world.

7. Other relevant points:

The chance of spotting a whale on a cruise is around 70%, and if including dolphins, the chances approach 90%. The highest chance of spotting dolphins and whales is during Golden Week, and there are only 5 to 10 days during the year where no dolphins or whales can be spotted. (Excluding days in which cruises are cancelled due to weather)

9. Kochi Prefecture

Year	Number of Businesses	Number of tour participants	Total sales	Number of workers	Monthly wage
2008	Unknown	Unknown	Unknown	Unknown	Unknown
2015	20 vessels (business owners tend to be captains)	around 6,000	30 million yen (approximately)	around 20~25	Unknown

1. Number of dolphin, whale watching businesses:

Kuroshio Town: 8 vessels

Uta: 8 vessels

Other: vessels dispersed in places such as Muroto, Tosa-Shimizu

2. Annual number of cruise passengers:

Around 6000 people

3. Number of employees

Captains + Local offices: around 20 workers

4. Dolphin, whale watching season:

Varies slightly by locality, but generally from late March to late October/

5. We were told in this year`s survey hearing that Ogata district in Kuroshio Town first started dolphin and whale watching tours in 1989. Usa began offering tours in 1996. Ogata is one of the localities with the longest history of whale watching, second only to Ogasawara Islands.

6. Dolphin, whale watching style:

In general, dolphin and whale watching businesses are run as a side business by fishermen and as a result, boats used on tours tend to be small fishing vessels, displacing around 9 tons and with a capacity of around 12 passengers. Hiring boats for tours and taking reservations for tour participants is managed by a coordinating office, and not by Kuroshio Town and Usa itself.



(tour boat in Usa)



(meeting place in Kuroshio Town)

7. Recent changes:

This year's survey hearing found that there is a difference in passenger numbers between localities in Kochi prefecture. In Kuroshio Town, whale watching attracted the largest number of participants in the 1990s when tours were first established. There were around 20,000 passengers per year during that time. Since then, numbers have decreased to the point where presently there are less than 2,000 passengers per year. There also used to be whale-watching businesses near Kochi City but they have all ceased to operate.

On the other hand, due to easier access from the rest of the country compared to Kuroshio Town, Usa enjoyed record numbers of reservations and passengers this year.

8. Recent Issues in whale watching:

The most significant recent issue is that the probability of encountering Bryde's Whales, the main attraction for whale watchers in Kochi prefecture, is declining. The chances of seeing other species such as dolphins are not high either, contributing to a downward trend in customer satisfaction. This situation may have led to the wider decrease in visitors to Kochi prefecture as a whole. There is also evidence of friction between localities in Kochi.

9. Change in customer base:

Numbers of foreign visitors are increasing, and from our survey hearing in Usa, we were told that 90% were either from Europe of North America.

10. Ogasawara (Tokyo)

Year	Number of Businesses	Number of tour participants	Total sales	Number of workers	Monthly wage
2008	22	14,700	130 million yen (approximately)	Unknown	Unknown
2015	25	16,200	160 million yen (approximately)	around 50	130,000 million yen~200,000yen

Ogasawara Village is located roughly 1000 kilometers south of the city of Tokyo city and is administered by Tokyo prefecture. It is accessible only by ferry. A voyage from Takeshiba pier in Tokyo takes around 24 hours, and there is a scheduled voyage (excluding the peak tourist season of New Years, Spring Vacation, Golden Week, Summer Vacation) once every week. As a result, once on Ogasawara island, a visitor must stay for three nights before the same ferry back to Tokyo returns on it`s round trip voyage.

History of whale watching in Ogasawara:

Year	Event
1987	Plans to revitalize the Island through whale watching are first planned
1988	Fact-finding mission is sent to observe the whale watching industry in Maui, Hawaii and to learn about economic benefits. A Canadian Researcher is invited to Ogasawara and begins research on Humpback whales. Whale watching manual created for the first whale watching tour. Foreign media such as ABC, CNN, National Geographic, BBC come to

	Ogasawara to report about whale watching.
1989	Ogasawara Whale watching Association (OWA) established. Japanese media report about whale watching and introduces whale watching to the domestic audience.
1992	Voluntary rules for whale watching are added to whale watching manual.
1993	Ogasawara enjoys it`s first whale watching boom.
1994	International Cetacean Education Research Center (ICERC) symposium held in Ogasawara.
1997	Voluntary rules for whale watching are revised and edited. Sperm whale watching takes place for the first time.
2003	Dolphin research team created.
2006	Dolphin • whale watching summit held. Individual identification trackers for Indo-Pacific Bottlenose dolphin are made.
2008	Japan Eco-tourism Convention held in Ogasawara.
2011	Ogasawara is registered as a UNESCO World Heritage site
2012	Registration as World Heritage site brings about the peak of a second whale watching boom.

Whale watching and dolphin swimming businesses:

1. Numbers of businesses:

Chichijima: 24

Hahajima: 1

From 2008, 3 new businesses have been established. Out of these 25 businesses, 17 are mainly based around whale watching and dolphin swimming tours, while 8 are run by scuba diving businesses.

2. Number of workers:

Out of the 25 businesses, many are run by single individuals, yet there are over 50 workers devoted entirely to whale watching and dolphin swimming businesses, composing around 2% of the island`s population.

3. Average income of workers:

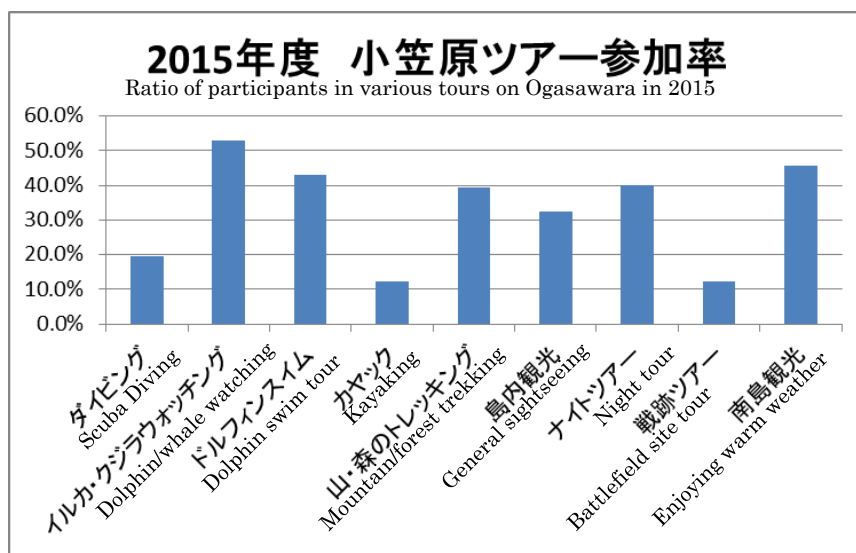
A worker, employed full time for one year has a starting monthly wage of around 130,000yen, and after five years work experience, can earn to around 200,000yen. Compared to other professions, this figure is relatively low.

4. Sales figures:

Whale watching and dolphin swimming businesses generate an estimated 160 million yen per year. Based on figures from 2008, generally, a small-scale business generates around 5 million yen annually, while a medium-scale business generates around 10 million yen annually.

5. Numbers of visitors:

According to 2015 figures, whale watching and dolphin swim participants numbered around 16,200 people and is the most popular tour amongst visitors to Ogasawara.



(Ogasawara Tourism Marketing Research)

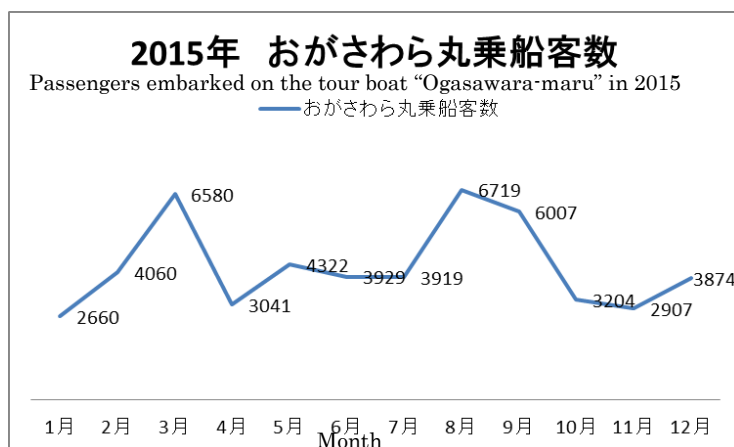
6. Price of whale watching and dolphin swim:

In 2008, whale watching and dolphin swim tours were priced on average at around 4,000yen per person for a half-day voyage. However after

Ogasawara was registered as a World Heritage site and brought about the second tourism boom to the island, the price was raised to 5,000yen per person for a half-day voyage, and to 11,000yen for a full-day voyage.

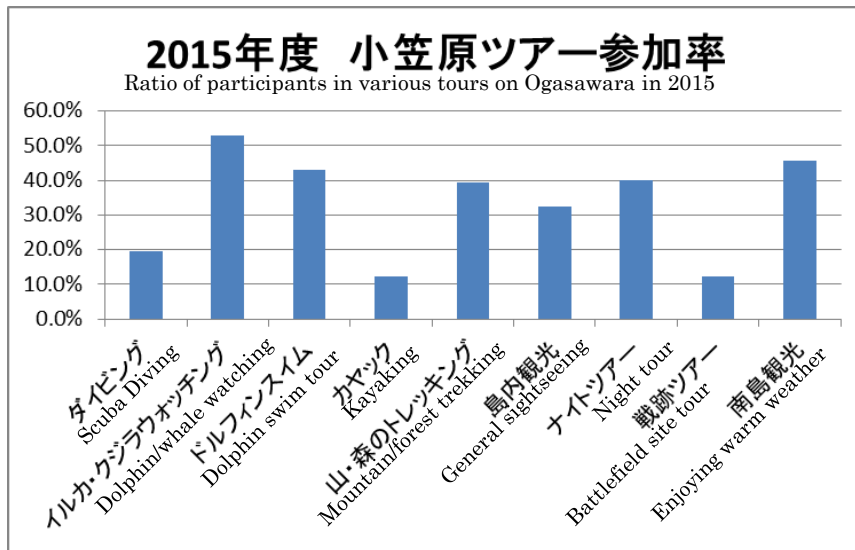
7. Effects on the local economy:

- ① Countering off season inactivity: Before whale watching tours began on the island, tourists only used to visit in the summer months, however after whale watching tours for humpback whales began, this has changed somewhat, as is shown below.



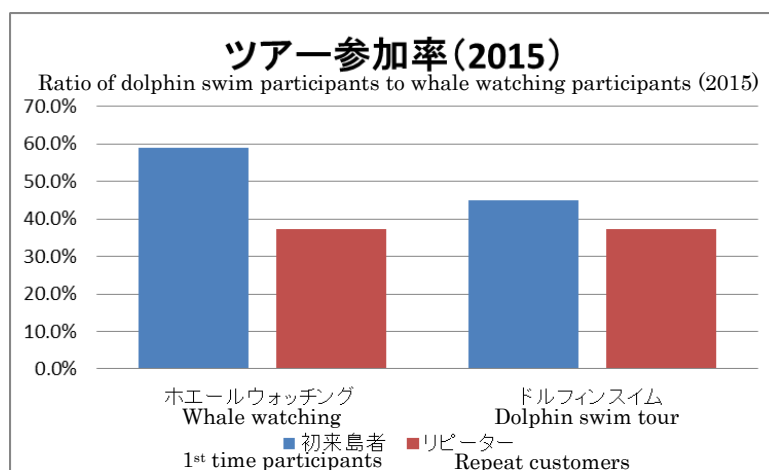
(Ogasawara Marine Transport Company)

- ② Contribution to local economy: The entire tourism industry in Ogasawara is thought to generate around 2 billion yen per year, and out of this, whale watching and dolphin swim tours directly contribute around 160million yen.
- ③ Attracting more visitors: Currently, more than 50% of visitors visit the island to participate in marine recreation activities including scuba diving. This is a much higher figure than visitors who come to the island to enjoy land based recreational activities.



(Ogasawara Tourism Marketing Research)

- ④ Repeat visitors: Many whale watching and in particular, dolphin swim tour participants choose to return to take part again, or in other words, become repeat visitors. Figures are shown below;



As is seen above, it is apparent that dolphin swim tours in particular attract repeat customers. Dolphin swim tours are particularly popular with young women, and indeed, it is not rare to find residents that moved to the island to be able to live near dolphins. Ogasawara has a low average residence age and a high birthrate, and it is thought that dolphin swim tours have contributed towards this.

	National average	Ogasawara Village
Total birth rate (2014)	1.42	1.82

8. Rules and Manners:

As mentioned earlier, Ogasawara has a set of voluntary rules that must be followed by whale watching, dolphin swim tour participants as well as businesses. Shown below;

Voluntary Rules (for whale swim tours)

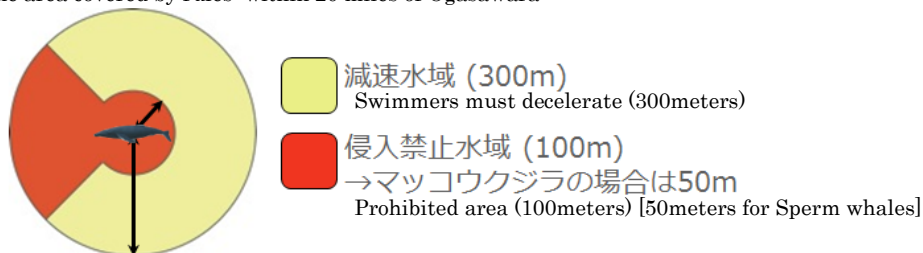
自主ルール（クジラ編）

Cetaceans covered by rules: all species of Baleen whales, Sperm whales

適用鯨種：全てのヒゲクジラ類、マッコウクジラ

適用海域：小笠原諸島の20マイル以内

Marine area covered by rules: within 20 miles of Ogasawara



- ・クジラの進路や行動を妨げない Do not get in between the whale and it's path
- ・**300m**以内に近づいたら減速する Decelerate when distance to whale is 300 meters or less
- ・クジラから**100m**(50m)以内には近づかない Stay beyond 100 meters (50 meters for Sperm whales)

(OWA)

Voluntary Rules (for dolphin swim tours)

自主ルール（イルカ編）



Regardless of displacement, only up to **4 vessels** can approach a pod at a time

- ・ひとつの群にアプローチできる船は、船の大小を問わず**4隻**まで

※ウオッチングのみの場合も含まれる

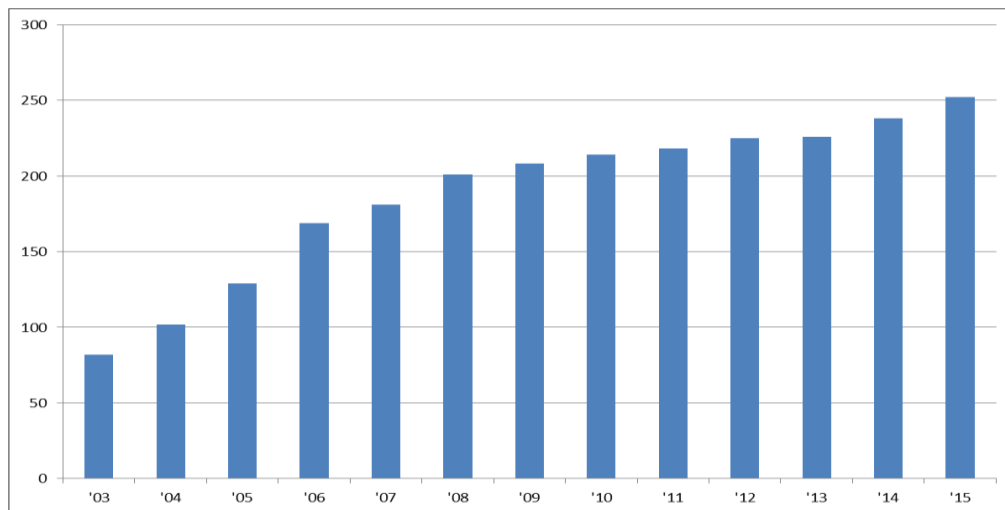
In the event of more than 2 vessels approaching the same pod, a maximum of **5 dives** per boat is permitted

- ・2隻以上の船がひとつの群にバッピングした場合は、
水中へのエントリー回数を1隻につき**5回**まで

(OWA)

9. Current status of Humpback whales and Indo-Pacific Bottlenose dolphins living in waters off Ogasawara:

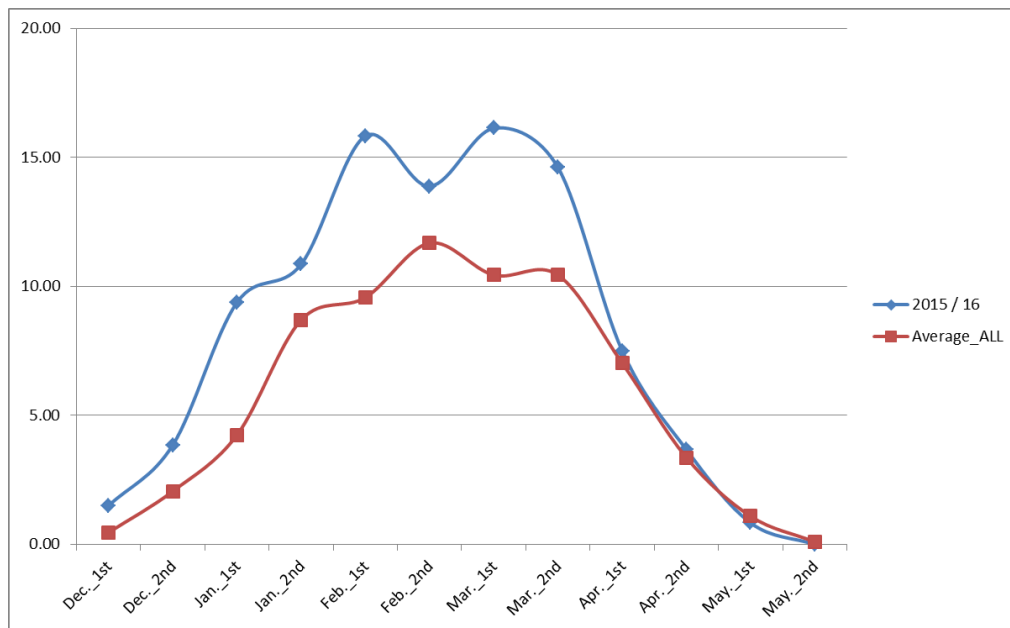
Ogasawara Island gathers information on numbers of Humpback whales and Indo-Pacific Bottlenose dolphins, and is shown in the graphs below:



(Numbers of Indo-Pacific bottlenose dolphins inhabiting waters off Ogasawara, OWA)

Starting in 2003, Ogasawara has been tagging dolphins with individual identification trackers in order to ascertain the size of the population, which is currently believed to be around 250 dolphins. The distribution and range of the dolphins are also being tracked, and since there has been no significant change in either, Ogasawara believes that dolphins swim tours have not driven dolphins away from it's waters and is sustainable for the dolphin population.

Regarding Humpback whales, please look at the graph below.



(Number of Humpback Whales inhabiting waters off Ogasawara, OWA)

The figures in the graph above were through collected through December to May from a weather station that also conducts fixed-point observation of Humpback whales. The numbers on the y-axis are the numbers of Humpback whales that were sighted in a span of thirty minutes, and on day`s where the sea condition was stable, thirty minute observations were carried out each day. Although the graph uses the newest available data, we found out from the results that especially during peak season, the numbers of whale sightings were below average. As far as we can tell from this graph, there seems to be no overall decrease in the number of Humpback whales that visit Ogasawara.

10. As mentioned previously, Ogasawara was registered as a World Heritage site in June 2011 and immediately after this, tourist numbers peaked, increasing by 60%, with whale watching and dolphin swim tour participants increasing accordingly. After this however, tourist numbers began to decrease, and currently numbers have decreased by 25% from peak levels, and accordingly, participants in whale watching tours are decreasing as well. The price of whale watching and dolphin swim tours increased when Ogasawara became a World Heritage site, and these

prices continue to be maintained, and workers earn around 130,000yen to 200,000yen per month. (in most cases, room and board is paid by the employer) Compared to the average level of income in Japan, (salary of 4.14 million yen or monthly wage of 345,000yen [data provided by Tax Bureau]) income is low, and combined with the relatively high price living expenses in Ogasawara compared to the rest of Japan, whale watching and dolphin swim tour workers must have an austere lifestyle. Job retention amongst whale watching and dolphin swimming tour workers is an important issue.

On the other hand, as mentioned earlier, the probability of encountering humpback whales and indo-pacific bottlenose dolphins is increasing and increasing numbers of foreign tourists from Europe and North America where whale watching and dolphin swim tours are popular, points a positive picture for Ogasawara.

Cetaceans that can be sighted in Ogasawara:

<i>Small Cetaceans</i>	<i>Spinner Dolphin</i> <i>Indo-Pacific Bottlenose Dolphin</i>
<i>Large Cetaceans</i>	<i>Sperm Whale</i> <i>Humpback Whale</i>



(provided by OWA)



(provided by OWA)

11. Amakusa (Kumamoto) • Shimabara (Nagasaki)

Year	Number of Businesses	Number of tour participants	Total sales	Number of workers	Monthly wage
2008	Unknown	Unknown	Unknown	Unknown	Unknown
2015	Around 15 vessels	Around 90,000	180 million yen (approximately)	Around 20	130,000yen~180,000yen

1. Number of businesses:

Kumamoto: 12

Nagasaki: around 3

2. Annual number of passengers:

Around 90,000 people

3. Numbers of workers:

Captains + Local offices + others: around 20

4. Whale watching season:

Year-round tours are available

5. Recent History:

We were told that Amakusa began offering whale watching tours around 20 years ago, while the current operating model was adopted from around 2008.

6. Whale watching in Amakusa and Shimabara:

In general, whale watching businesses are run as a side business by fishermen or by other cruise boat operators. (Some businesses run dolphin watching as a main business and whale watching as a side business.) Tour boats mainly consist of small motor yachts commonly used in scuba diving tours, with a displacement of around 9 tons, which are relatively small vessels but do confer some particular advantages. While there are offices that coordinate booking and reservations, in Amakusa the guides on the tour boats themselves try and draw in passengers, which is quite a rare thing amongst tour boat operators.

7. Uniqueness of Amakusa and Shimabara:

In Amakusa, it is possible to encounter a relatively wide variety of dolphin species only 10 minutes cruise from the harbor. Dolphin watching tours are rather short at around 1 to 1.5 hours duration. However, when embarking from ports other than Goshyoku port, extra time is needed travelling back and forth from the dolphin watching spot. There is a pod of around 200 Indo-Pacific Bottlenose dolphins living in waters nearby, and the probability of encountering them is high.

8. Changes in customer base in Amakusa:

In recent years, there has been an increase in individual participants, relative to participants on group tours. Once again, there were quite a few foreign tourists, and indeed there was a visitor from France on our same tour. Out of all foreign tourists, visitors from Europe and North America seem to be particularly high in number.

9. Issues in Amakusa:

Kumamoto prefecture, in which Amakusa is located, experienced a major earthquake in 2016 and suffered major damage. Localities involved in dolphin watching were spared from significant material damage, yet is suffering from a dramatic decrease in tourist numbers. This is also happening in neighboring Shimabara region. Participants in dolphin watching tours have also been captured by neighboring prefectures, which is a major issue concerning reconstruction in Kumamoto.

Additionally, dolphin watching tours in Amakusa have a low price of around 2,500yen for one adult. (depending on the specific region)

Workers receive various discounts, and as a result earn around 150,000yen, which is not a high level of income. One of the main issues in Amakusa seems to be how to increase the total amount of sales.



(Scenes of dolphin watching in Amakusa)

12. Amami-Oshima (Okinawa) • Okinoerabushima (Kagoshima)

Year	Number of Businesses	Number of tour participants	Total sales	Number of workers	Monthly wage
2008	0	0	0	0	0
2015	9	Around 1,200	Around 7 million yen	Unknown	Around 130,000 yen

1. Number of businesses in Amami region (including Amami-Oshima and Okinoerabushima):

Amami-Oshima: 7

Okinoerabushima: around 2

2. Annual number of passengers:

1,000~2,000 people

3. Number of workers:

Unknown (most also work in scuba diving tours)

4. Season:

January to April

5. Recent History:

Ever since whale watching became popular in Okinawa, due to the fact that humpback whales can be sighted off it's shores, Amami-Oshima began feasibility studies for whale watching from around 2006. It began offering whale watching tours in 2013. There were 250 participants in 2014, and 500 in 2015, showing an upwards trend. Okinoerabushima began offering whale watching tours as an option on it's scuba diving tours starting in 2008.

6. Whale watching style:

Whale watching businesses are generally run alongside scuba diving businesses, and in one such business, is run as a side business by a fishing boat. The majority of tour boats are small motor yachts used in scuba diving tours.

7. Uniqueness of Amami region:

Amami is unique in that it offers whale swim tours, where a participant can swim alongside a whale. Once again, rules have been established for participating in swimming with whales. Whale swim tours are conducted with only a few participants at a time. Whale watching businesses on Amami-Oshima cooperate with each other, and share information, increasing the chances of humpback whale (a main attraction during winter months) encounters.

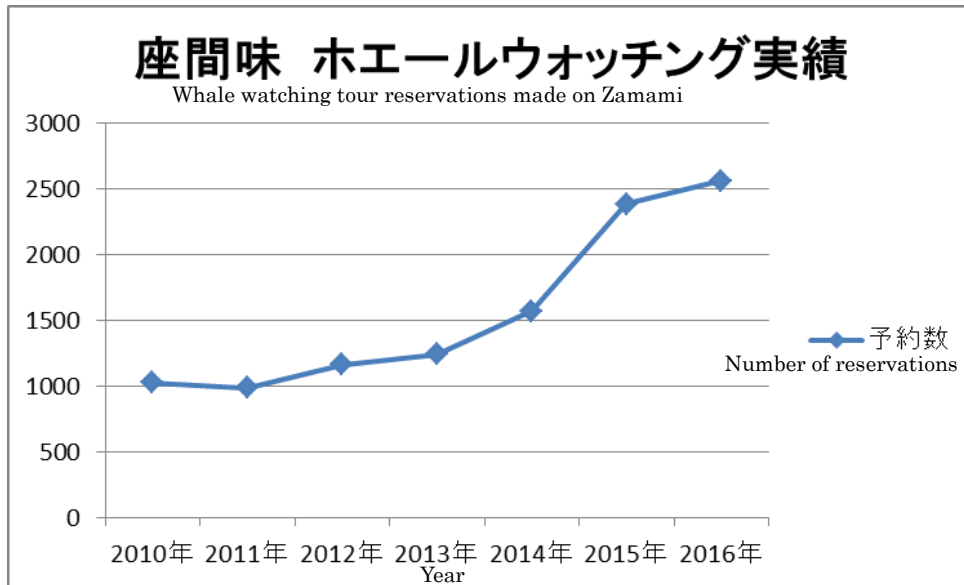
8. Issues and future potential of Amami region:

Whale watching only began very recently on Amami-Oshima, and numbers of participants remain low. On the other hand, the number of participants, while low, has doubled every year and there is much reason for high expectations. Due to this, the issue is how to respond to increasing numbers of participants in whale swim tours, while making sure that each tour group has only a few participants. Okinoerabushima has only a few whale watching businesses, and as a result there was little information of whale watching on the island.

13. Zamami (Okinawa)

Year	Number of Businesses	Number of tour participants	Total sales	Number of workers	Monthly wage
2008	22	Around 5,300	Unknown	Unknown	Unknown
2015	18	Around 6,000	3 million yen (approximate)	50	130,000yen ~200,000yen

1. Annual number of passengers:
6,000 people (includes some passengers who made multiple voyages)
2. Species of whales that can be seen:
Humpback whale
3. Whale watching tour fee:
5,000 yen per adult
4. Total sales:
30 million yen
5. Number of businesses:
18 (out of which, 15 are run as a side business by scuba diving tour businesses, 2 are run as a side business by kayak tour businesses, and one is run as a side business by a fisherman)
6. Income of workers:
150,000yen to 200,000yen monthly wage
7. Number of reservations:
See below;



8. Zamami Village Whale Watching Association:

- ① Recent history: Zamami Village Whale Watching Association was set up around 20 years ago and the businesses on the island have been conducting whale watching tours ever since. There are no businesses that exclusively operate whale-watching tours, yet whale watching is important for generating income during the off-season and has allowed businesses to retain workers year round. The income of workers used to be below the minimum wage of Okinawa prefecture, but in recent years has remained at levels equal to the minimum wage.
- ② Probability of encountering whales:
The probability of encountering whales has increased to its current level at over 90% due to an increase in the whale population as well as increased technical proficiency by tour operators.
- ③ Recent topics:
In the past few years, numbers of foreign tourists have seen an overwhelmingly increase compared to previous years. In a survey conducted in 2008, the percentage of foreigners in Okinawa was concluded to be around 5% of the population of Okinawa, however at present, this figure is closer to 30%.

9. Issues:

Although workers can earn a decent income, it is still insufficient for supporting a family. As a result, workers leaving their jobs due to marriage, childbirth or bringing up children is not so uncommon. Although worker's incomes are higher than they used to be, whale watching still does not offer stable employment. Thus, the main issue is how to create a system of wage payments that lead to stable employment and job retention.

14. Okinawa main island (Okinawa)

Year	Number of Businesses	Number of tour participants	Total sales	Number of workers	Monthly wage
2008	Unknown	Unknown	Unknown	Unknown	Unknown
2015	Around 1	Around 83,700	220 million yen (approximate)	Over 70	Unknown

1. Number of businesses offering whale watching on the Main Island:

South-Central Okinawa Main Island: 10

Northern Okinawa Main Island: 5

It is possible that there are additional shops offering whale watching tours. (researched by Okinawa Chyura-umi Zaidan)

2. Number of participant in whale watching tours:

South-Central Okinawa Main Island: around 45,020 people

Northern Okinawa Main Island: around 8,707 people

※ Additional figures obtained from survey hearing and an estimation of the number of participants in businesses that we could not obtain data from

3. Average number of guides present on a whale watching tour:
South-Central Okinawa Main Island: 3~12 workers
Northern Okinawa Main Island: 2~8 workers
4. Price of whale watching tour:
South-Central Okinawa Main Island: 4,200yen to 4,800 per adult
(4,200yen was the most common price on offer)
Northern Okinawa Main Island: 4,300yen to 4,800yen per adult
(4,500yen and 4,800yen were the most common price on offer)
※ Most shops offer a 1,000yen discount for children
5. Whale watching style:
The majority of whale watching businesses are run as side businesses.
The whale watching boats tend to be relatively large motor yachts, such as those used for scuba diving tours. Whale watching season is during the winter months. (January to April)

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Mikurashima Tourism Association
Nanki Leisure Marine Service limited
Whale watching vessel “Kiyō-maru”
Kushimoto Diving Park
Whale watching vessel “Kokai-maru”
Ogata Tour/Fishing vessel owners Association
Usa Whale watching Association
Ogasawara Whale watching Association
Sea-Tac
Club Noah Hahajima
Amami Whale • Dolphin Association
Muga-Muga Diving
GT Divers Okinoerabushima
Okinawa Churashima Foundation
15 whale, dolphin watching businesses on Okinawa main island
Other groups and individuals who responded to our research via telephone