



APIR

**Kansai and the Asia Pacific Economic
Outlook 2021-22**

Part II

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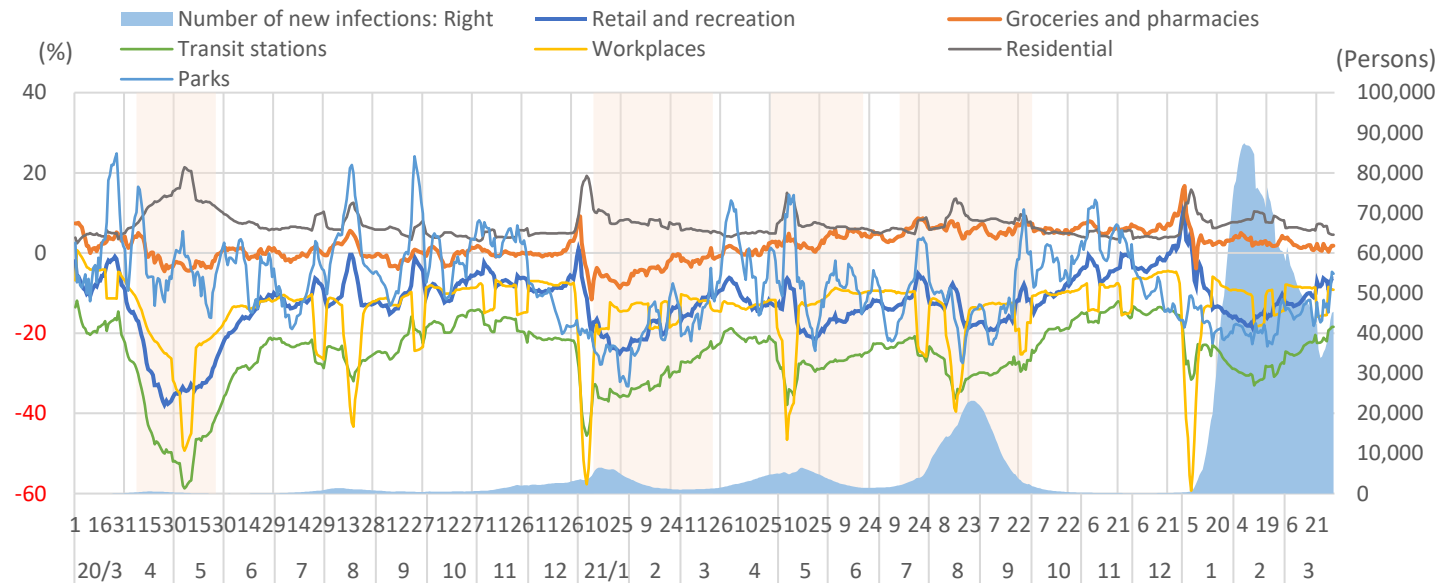
The COVID-19 Pandemic and Household Responses

- ◆ We analyzed the **people's flow** and **household consumption trends** based on high-frequency daily data by using Google "COVID-19 Community Mobility Report" and MIC "Household Survey"
- ◆ High-frequency daily data show how the visitors to the **six categories** changed compared to the reference value
- ◆ **Categories:** retail stores / entertainment facilities, grocery stores / pharmacies, parks, public transportation, workplaces, and residences.
- ◆ The epidemiological situation and the anti-COVID-19 measures had a deep impact on the people's flow.

Table 2-1-2 Place categories and target places

Category	Target places
Retail and recreation	Restaurants, cafes, shopping centers, theme parks, museums, libraries, movie theatres, etc.
Groceries and pharmacies	Grocery stores, food wholesalers, fruit and vegetable markets, luxury grocery stores, drug stores, pharmacies, etc.
Parks	Local parks, national parks, public beaches, marinas, dog parks, plazas, gardens, etc.
Transit stations	Public transportation bases (eg subway, bus, train stations), transfer stations, etc.
Workplaces	Workplaces
Residential	Residences

Source: the Community Mobility Report by Google LLC



The COVID-19 Pandemic and Household Responses

- ◆ By refraining from going out, households cut “**non-essential consumption**” .
- ◆ **The decline rate in non-essential consumption** during the state of emergency is shown in Table 2-1-3:
 - First SoE: **-41.1%**. Sectors such as public services, entertainment, dining out, etc. are highly affected.
 - Second SoE: **-19.7%**. The decline rate was halved compared to the first SoE.
- ◆ Decrease in household consumption in Kansai area (6 prefectures)
 - First SoE: **714 bn Yen (0.9% of nominal GRP)**
 - Second SoE: **350 bn Yen (0.4% of nominal GRP)**

Table 2-1-3

Non-essential consumption decline rate comparison

(Unit: JPY, %)

Item	Item of expense	First SoE (20/4/7~5/25)		Second SoE (21/1/8~3/21)	
		Expenditure	YoY change	Expenditure	YoY change
Durable goods	Cars, household electric appliances, furniture, etc.	18,574	9.4	30,937	-2.1
Semi-durable goods	Clothes, bags, jewelry, etc.	17,983	-41.3	37,161	-11.2
Non-durable goods	Food, consumables, etc.	10,013	-3.4	13,592	-1.1
Public services	Rail fares, highway fares, etc.	392	-91.8	1,890	-65.4
Dining out	Dining out	6,247	-68.0	15,642	-39.5
Entertainment	Travel fees, facility admission materials, monthly fees, etc.	5,972	-73.1	14,733	-41.8
Others	Parking fees, rent-a-car fees, etc.	6,081	-5.1	9,927	-5.3
Total		65,263	-41.1	123,882	-19.7

Source: Estimated by the author.

Table 2-1-4

Consumption decline due to the state of emergency

(Unit: JPY 100 million, %)

Period	Item	Osaka	Hyogo	Kyoto	Kansai (3 pref.)	Shiga	Nara	Wakayama	Kansai (6 pref.)
First SoE (20/4/7 ~5/21)	Consumption decline	3,193	1,877	888	5,959	455	450	276	7,140
	Composition ratio	44.7	26.3	12.4	83.5	6.4	6.3	3.9	100.0
	Relative to nominal GRP (FY2020)	0.8	0.9	0.9	0.9	0.7	1.2	0.8	0.9
Second SoE (21/1/14 ~2/28)	Consumption decline	1,565	920	435	2,921	223	221	135	3,500
	Composition ratio	44.7	26.3	12.4	83.5	6.4	6.3	3.9	100.0
	Relative to nominal GRP (FY2020)	0.4	0.4	0.4	0.4	0.4	0.6	0.4	0.4

Note: nominal GRP for FY2020-estimations by APIR

Source: based on Prefectural Economic Calculations (Cabinet Office) & KEIQNo.54(APIR)

The COVID-19 Pandemic and the Responses of Firms

- ◆ A "K-shaped" recovery in which recovery is uneven across different industries.
- ◆ Changes in ordinary profits:
 - Starting with 2020 Q2 onward, **the manufacturing sector**, especially export-related companies, is supported by the global economic recovery, and **ordinary profits starts to increase** during 20 Q4.
 - By contrast, **the non-manufacturing sector continued to decline.**
 - **The decline was more pronounced for the following categories:** accommodation and food services, lifestyle-related services and entertainment, and transportation and postal services sectors.
 - **Profitability deteriorated in the face-to-face services industry.**

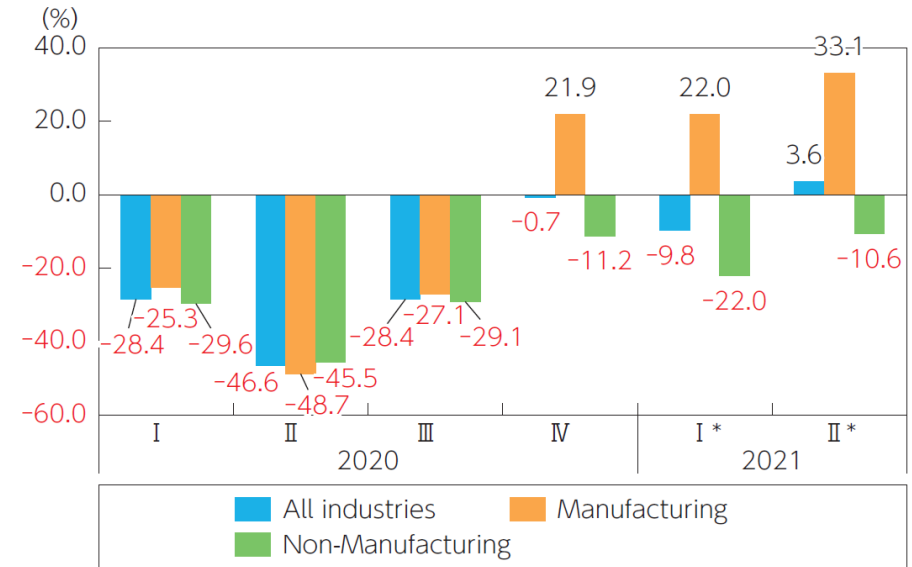


Figure 2-2-1

YoY change in ordinary profits by industry

Note: * change is relative to the same period of the pre-pandemic 2019.

Source: based on Survey of Corporate Business Statistics (Ministry of Finance)

The COVID-19 Pandemic and the Responses of Firms

◆ Earnings and financial trends in the accommodation industry (Table 2-2-1):

- **The decline was somewhat reduced by the Go To Travel campaign.** However, it widened again after the temporary suspension of the campaign(Dec. 2020).
- **The accommodation industry has a high fixed cost ratio.** While it is difficult to expect improvement in sales, **labor costs will be controlled by adjusting working hours and personnel.**
- Retained earnings also decreased significantly. Procured funds through interest-bearing debt to secure liquidity.

◆ Earnings and financial trends in the food and beverage service industry (Table 2-2-2):

- Sales and ordinary profits continue to deteriorate, although not as much as in the accommodation industry.
- This industry also has a high fixed cost ratio, and **there is significant pressure to adjust employment** in response to deteriorating profits.

Table 2-2-1 Earnings and financial trends in the accommodation industry

Unit: %

		Total					
		20Q1	20Q2	20Q3	20Q4	21Q1*	21Q2*
Revenue	Sales	-25.1	-80.0	-59.0	-46.9	-61.7	-70.4
	Ordinary profits	-1,025.6	-624.0	-245.9	-116.4	-1,531.5	-371.0
	Labor costs	1.9	-42.6	-38.6	-40.3	-23.2	-46.2
	Fixed costs ratio**	40.6	92.7	54.3	41.0	77.1	59.5
Assets	Cash/deposits	-25.2	-2.3	6.0	15.7	-4.9	-2.5
	Tangible fixed assets	-0.5	-29.7	-10.2	-15.4	-9.6	-30.6
Liability /Net assets	Short-term debts	-10.8	-32.7	-2.7	-24.7	15.9	-27.8
	Corporate bonds	-35.4	-27.6	-31.4	-36.0	-47.9	-34.5
	Long-term debts	26.4	-23.6	2.0	4.7	24.0	-18.0
	Total net assets	-0.7	13.9	-12.5	-52.2	-54.8	-49.3
	Retained earnings	-39.7	-8.1	-46.0	-66.8	-110.4	-120.7

Note: *relative to the same period in 2019 **Raw figures
Source: based on Survey of Corporate Business Statistics (Ministry of Finance)

Table 2-2-2 Earnings and financial trends in the eating and drinking services industry

Unit: %

		Total					
		20Q1	20Q2	20Q3	20Q4	21Q1*	21Q2*
Revenue	Sales	-2.1	-29.6	-8.0	-6.1	-19.2	-24.5
	Ordinary profits	-182.6	-435.6	-237.6	-103.8	-300.1	-145.7
	Labor costs	7.3	-17.4	-7.6	-3.9	-5.0	-39.2
	Fixed costs ratio**	34.7	34.0	31.4	31.7	37.5	25.8
Assets	Cash/deposits	23.6	19.2	41.9	32.7	69.6	67.4
	Tangible fixed assets	12.6	-11.5	5.4	13.3	-4.5	0.2
Liability / Net assets	Short-term debts	-10.1	-28.8	-15.7	-13.0	-8.2	-7.5
	Corporate bonds	-22.7	-39.7	-44.9	-39.3	-24.0	-30.2
	Long-term debts	15.5	6.3	47.2	32.8	27.2	132.7
	Total net assets	30.8	-13.4	-7.0	-27.7	5.0	-18.2
	Retained earnings	53.9	-15.1	-54.7	-51.9	-45.1	-58.4

Note: *relative to the same period in 2019 **Raw figures
Source: Based on Survey of Corporate Business Statistics (Ministry of Finance)

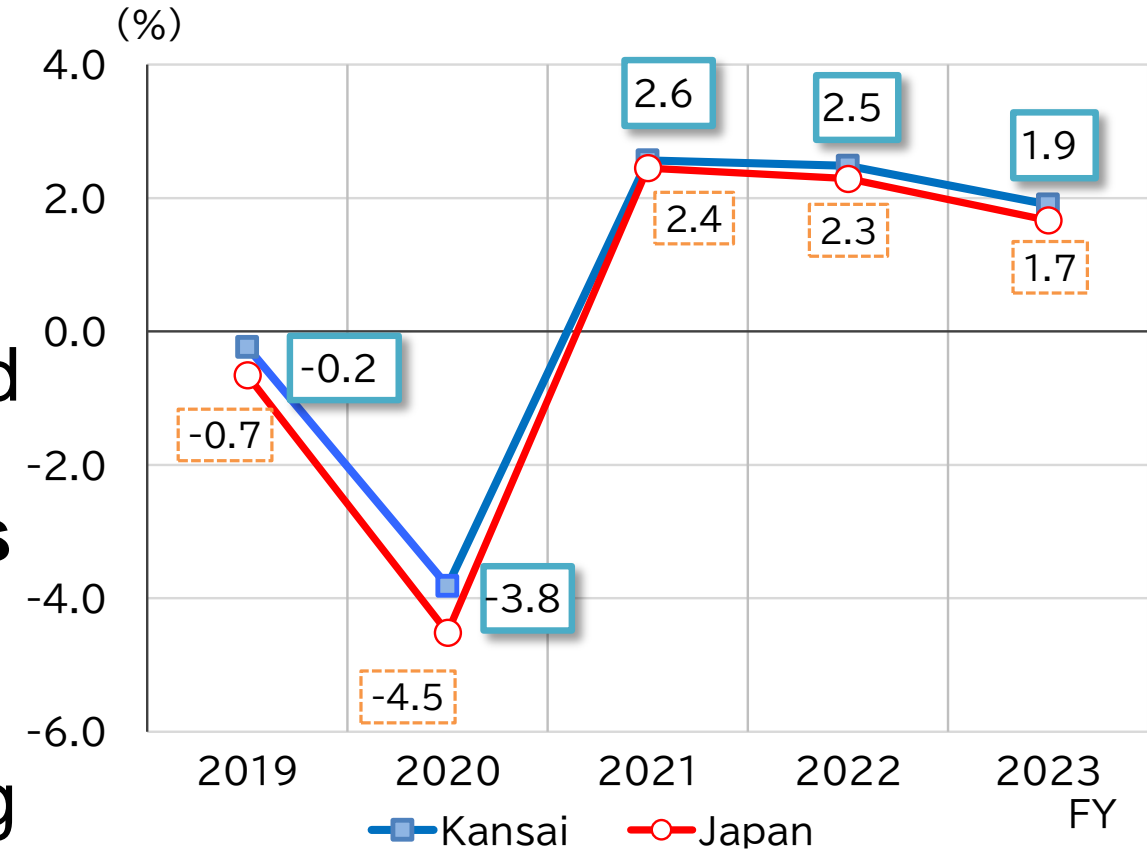
- ◆ GDP bottomed out at 89.9 in Q2 2020. Thereafter, it recovered for two consecutive quarters. However, due to the prolonged SoE in 2020, it repeatedly increased and decreased QoQ.
- ◆ In 2021 Q4, GDP significantly recovered from the previous quarter to 97.1. However, it was still 2.9% lower than the pre-pandemic peak (19 Q3) and has not yet recovered to its pre-pandemic level (19 Q4).
- ◆ By 2021 Q2, U.S. GDP had already recovered its pre-pandemic level. **Japan's GDP recovery process is very slow.**

GDP change compared to recent peak
(2019 Q3=100)

	GDP	Goods imports	Services import	Private final consumption expenditure	Private capital investment	Government spending	Goods exports	Services exports
19Q3	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
19Q4	97.2	98.3	96.0	96.4	94.5	100.2	99.1	100.5
20Q1	97.7	93.9	95.1	97.1	95.5	100.1	96.9	87.4
20Q2	89.9	94.3	87.5	88.8	91.8	101.1	78.7	75.3
20Q3	94.7	86.9	83.8	93.5	88.6	103.1	88.5	71.2
20Q4	96.4	93.1	84.2	95.0	88.5	104.1	99.2	74.5
21Q1	95.9	96.1	85.8	94.2	89.5	103.2	101.3	76.4
21Q2	96.5	98.9	91.5	94.9	91.2	103.1	104.5	78.9
21Q3	95.8	98.2	90.2	94.0	89.6	103.4	103.8	80.0
21Q4	97.1	98.5	88.3	96.5	89.1	102.5	105.4	78.5

Comparison of Baseline Forecasts for Kansai and Japan

- ◆ **Kansai will outpace national growth from FY 2021 to FY 2023, thanks to the contributions of public demand and net exports**
- ◆ **Public demand in Kansai is expected to grow faster than in Japan as a whole due to public works projects in preparation for World Expo in 2025**
- ◆ **In terms of external demand, strong exports to China and other regions in Japan are factors boosting growth**



Comparison of Forecasts for Kansai and Japan

Source : APIR "Kansai Economic Insight Quarterly No.58"

APIR's economic forecast: Kansai vs. Japan

- ◆ Stronger COVID-19 containment measure: weaker private consumption
- ◆ Strong public investment
- ◆ High exports growth

	Kansai					Japan				
	FY	2019	2020	2021	2022	2023	2019	2020	2021	2022
Private final consumption expenditure	▲ 1.0	▲ 5.8	1.8	2.3	1.4	▲ 1.0	▲ 5.4	2.6	2.5	1.4
Private residential investment	▲ 0.9	▲ 1.8	▲ 1.1	0.6	1.8	2.6	▲ 7.8	▲ 1.4	▲ 0.6	1.2
Private non-residential capital investment	0.4	▲ 4.7	1.2	2.9	2.9	▲ 0.6	▲ 7.5	1.3	2.5	2.7
Government final consumption expenditure	1.7	3.0	2.3	1.5	0.9	2.1	2.5	1.9	0.9	0.9
Public fixed capital formation	1.2	5.8	1.5	2.5	2.5	1.6	5.2	▲ 7.3	▲ 1.3	2.0
Exports	0.5	▲ 2.8	7.8	5.1	3.3	▲ 2.2	▲ 10.5	12.8	4.5	3.5
Imports	0.3	▲ 1.2	5.0	4.7	3.1	0.2	▲ 6.7	6.3	2.3	3.0
Real GRP/GDP	▲ 0.2	▲ 3.8	2.6	2.5	1.9	▲ 0.7	▲ 4.5	2.4	2.3	1.7
Private demand (contribution)	▲ 0.7	▲ 4.2	1.0	1.7	1.4	▲ 0.7	▲ 4.6	1.4	1.7	1.3
Public demand (contribution)	0.4	0.8	0.5	0.4	0.3	0.5	0.8	▲ 0.0	0.1	0.3
Net exports (contribution)	0.1	▲ 0.4	1.0	0.4	0.3	▲ 0.4	▲ 0.6	1.1	0.4	0.1
Nominal GRP/GDP	0.8	▲ 3.1	1.8	3.6	2.3	0.2	▲ 3.9	1.4	3.3	1.9
GRP/GDP deflator	1.0	0.7	▲ 0.8	1.1	0.3	0.8	0.6	▲ 1.0	1.0	0.2
Consumer price index	0.6	▲ 0.2	0.0	1.2	0.9	0.6	▲ 0.4	▲ 0.0	1.4	0.8
Industrial Production Index	▲ 4.5	▲ 8.2	5.1	3.2	2.7	▲ 3.8	▲ 9.5	5.9	3.0	2.5
Unemployment rate	2.6	3.1	3.0	3.0	3.0	2.3	2.9	2.8	2.7	2.6

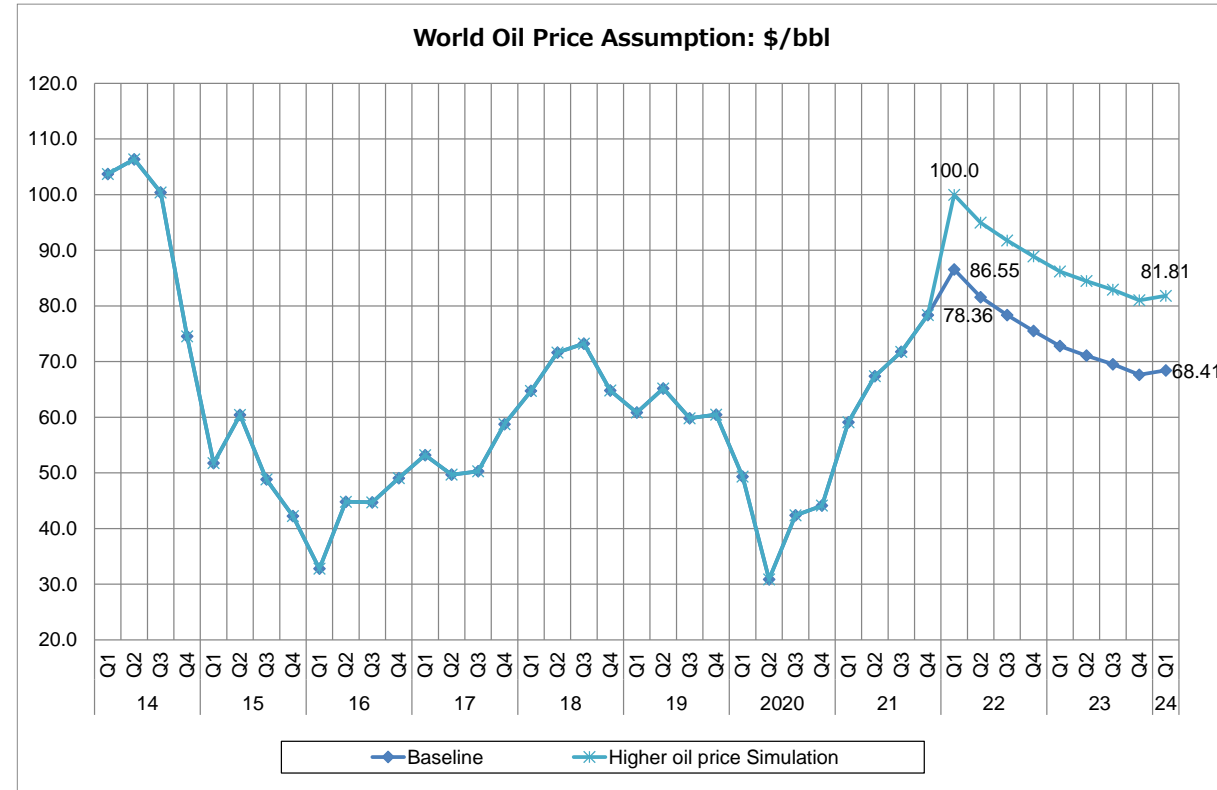
Notes: Unit= %. Figures for all components except 'Total unemployment rate' are growth rates. Forecasts for the Japanese economy are sourced from APIR's Economic Forecast and Analysis No. 137.

The risk of crude oil price hikes

- ◆ A simulation of oil price spike due to Russia's invasion of Ukraine
- ◆ World crude oil price in Jan-Mar 22: USD 86.6 ⇒ USD 100

(%)	FY2022	FY2023
Real GDP	-0.1	-0.3
Consumer price index	0.1	0.4
Corporate Goods Price Index	1.2	3.1
Private final consumption expenditure	-0.0	-0.2
Private non-residential capital investment	-0.0	-0.2
Export	-0.3	-1.2
Import	-0.0	-0.3

- ◆ Combined effects of prolonged high oil prices
 - Trade contraction, falling stock prices, a weak yen
 - Further decline in growth rate and inflation



- ◆ Until the pandemic outbreak, the number of foreign visitors was on a steady upward trend despite the 2011 Great East Japan Earthquake and the natural disasters that hit Japan in 2018.
- ◆ However, in 2020 it reached only 4,115,828 (-87.1% YoY), as the COVID-19 pandemic brought severe restrictions on international mobility.

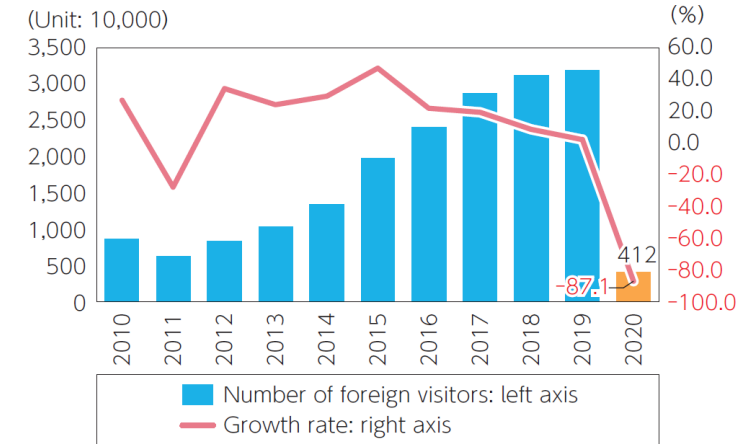


Figure 4-1-1

Evolution of foreign visitor numbers and annual growth rate: 2010-20

Source: Prepared based on *Foreign Visitors Statistics*, published by the Japan National Tourism Organization (JNTO)

- ◆ Comparisons of Japan’s total travel expenditure in 2019 and 20 (Figure 4-1-4).
- ◆ Domestic tourism generated the largest share of the total. In 2020, the restrictions imposed on people’s flow during SoEs led to significant drop in domestic tourism expenditure, which was approximately 9.9 trillion yen.

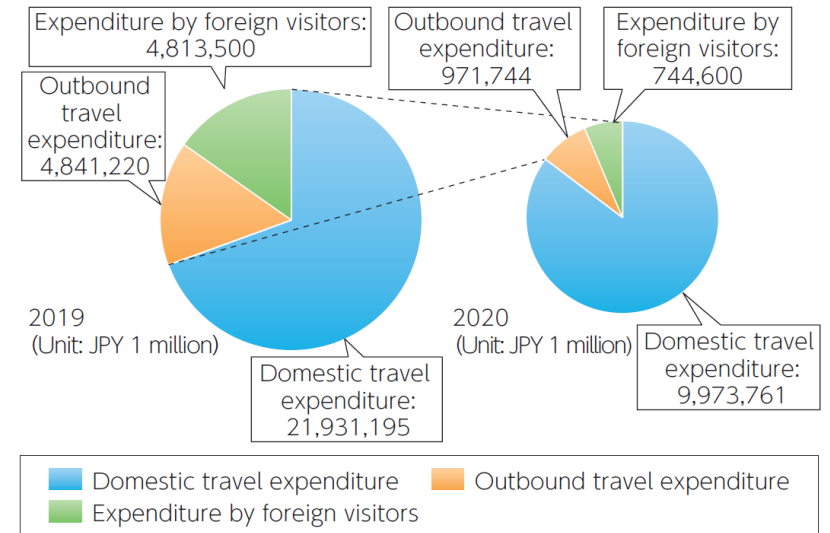


Figure 4-1-4

Travel expenditure: 2019-2020 comparison

Note: Outbound travel by Japanese nationals is counted as services imports and it includes overseas travel-related payments. Moreover, due to the COVID-19 pandemic, collecting data for Q2, Q3, and Q4 of 2020 was suspended. For this reason, the expenditure generated by foreign visitors in 2020 is an estimate calculated using the travel expenditure per capita in Q1 2020.

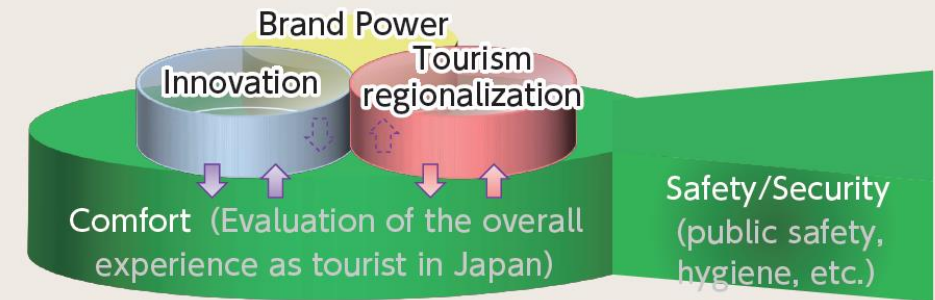
Source: Prepared based on *Travel and Tourism Consumption Trend Survey* and *Consumption Trends of International Visitors to Japan Survey*, published by the Japan Tourism Agency (JTA).

- ◆ **An analytical perspective for future inbound tourism strategies**
- ◆ Inbound tourism demand analysis must take into consideration “**safety, security and comfort**” as fundamental factors, in addition to “**brand power**”, “**innovation**”, and “**tourism regionalization**”.
- ◆ “**Safety and security**” are factors which influence decision-making before the trip, while “**comfort**” is what the visitors should feel during and after the trip.
- ◆ If we can instill the feeling of comfort even before the trip, it may be possible to raise foreign visitors’ expectations.

A: Last year’s Venn diagram



B: Updated Venn diagram



Timeline

During the trip-post-trip

Pre-trip

Figure 4-1-12

An analytical perspective for future inbound tourism strategies

Source: APIR

Future Roles and Challenges for DMOs

- ◆ Regional development cannot be carried out by the government alone, and the role of **DMOs will become even more important for future inbound tourism strategies.**
- ◆ In order to be registered in Japan, a DMO must fulfill a number of basic roles and functions, and meet the five requirements shown in Table 4-3-2.

Table 4-3-2 Role of DMOs

Basic roles of DMOs
(1) Build consensus on regional tourism development among various stakeholders
(2) Constantly collect and analyze various data, formulate strategies (branding) based on a clear concept and data, set KPIs and establish a PDCA cycle
(3) Promote local initiatives for destination development, such as improving tourist attractions which increase the region's overall attractiveness; transportation access, including intra-regional inter-connectivity; and the tourism infrastructure, including multilingual signage.
(4) Coordinate, develop, and promote consistent strategies for tourism-related projects implemented by related parties
Requirements for registered DMOs
(1) Play a central role in building consensus on regional tourism development among various stakeholders
(2) Collect data constantly, formulate strategies, set KPIs, establish a PDCA cycle
(3) Coordinate, develop, and promote consistent strategies for tourism-related projects implemented by related parties
(4) Acquire legal personality, clarify the responsible parties, ensure that data collection and analysis is done by experts.
(5) Ensure stable operating funds

Source: Prepared by the author based on "What is a Destination Management Organization (DMO)?" published on the Japan Tourism Agency's website.

Future Roles and Challenges for DMOs

- ◆ Characteristic of DMOs is related to the fact that the “value” of tourist attractions is in large part given by “invisible” factors such as history and culture.
- ◆ The DMOs of the post-pandemic era will have to create “stories” that are based on the regional culture and history and to develop their marketing strategies.

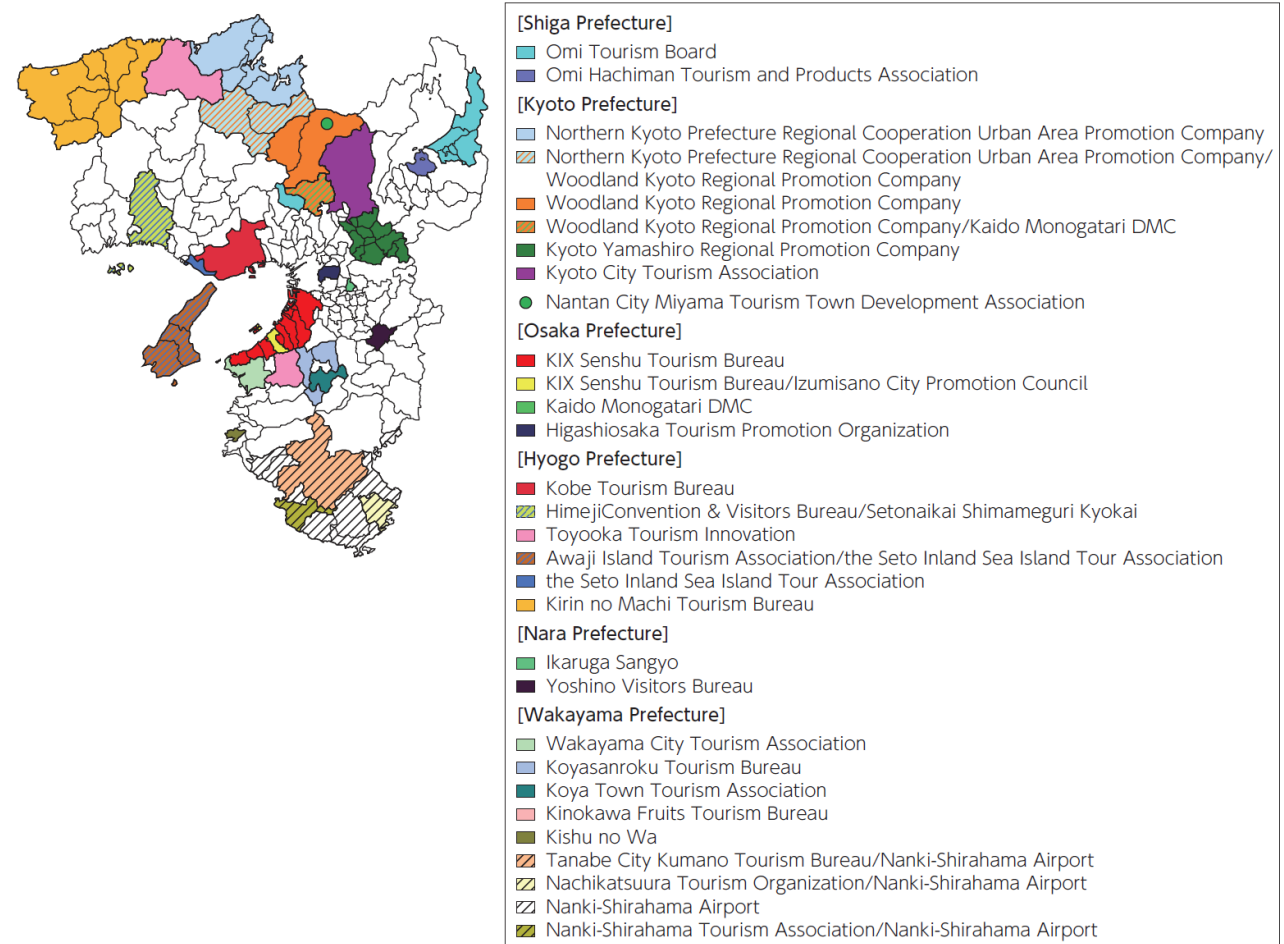


Figure 4-3-1 Geographical distribution of Kansai DMOs

Note: In addition to the DMOs listed above, there are regional DMOs that manage the entire prefecture: Biwako Visitors Bureau in Shiga Prefecture, Osaka Convention & Visitors Bureau in Osaka Prefecture, Hyogo Tourism Headquarters in Hyogo Prefecture, Nara Visitors Bureau in Nara Prefecture, and Wakayama Tourism Federation in Wakayama Prefecture.

Source: Prepared by the author based on "List of Organizations for Destination Development" published on the Japan Tourism Agency's website.

Overview of the TSA* and Outline of the Tourism Industry

◆ Comparing the impact of tourism to other industries on production, gross value added, and employment

◆ Production:

- Transportation equipment: 1st, Iron and steel: 2nd, Tourism: 21st

◆ Gross value added:

- Tourism: 14th, Transportation equipment: 28th, Iron and steel: 28th

◆ Employment:

- Tourism: 7th, Transportation equipment: 29th, Iron and steel: 33rd

What is notable for Tourism is that inducement for non-regular employees accounts for 36%, which is higher than the 22% as the average of manufacturing

***TSA: Tourism Satellite Account**

Table 4-4-5

Abstract of inducement coefficients based on compilation type 3 (38 sectors)

Production	Gross Value Added	Employment
1st Transportation equipment (2.45)	14th Tourism (0.90)	7th Tourism (0.14)
2nd Iron and steel (2.43)	27th Electrical machinery (0.77)	25th Electrical machinery (0.08)
9th Electrical machinery (1.9)	28th Transportation equipment (0.77)	29th Transportation equipment (0.07)
21st Tourism (1.68)	28th Iron and steel (0.75)	33rd Iron and steel (0.02)

Source: Estimated by the author.

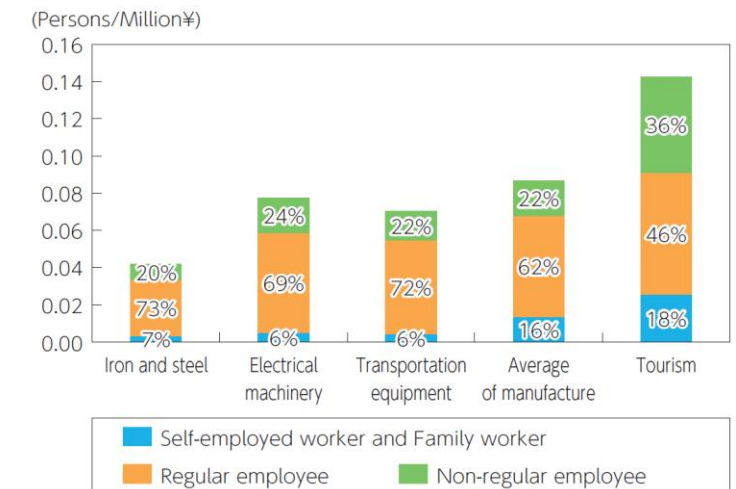


Figure 4-4-1

Ripple effect on employment by employment type

Source: Estimated by the author.

- ◆ **The direct effect of the declining of Japanese domestic travel consumption**
 - Direct effect ⇒ Value added : -5.3 trillion yen, Employment : -106.6 ten thousands persons
 - Ripple effect (Total) ⇒ Value added : -11.5 trillion yen, Employment : -187.2 ten thousands persons
- ◆ **The direct impact of the declining of inbound tourism expenditure**
 - Direct effect ⇒ Value added: -1.9 trillion yen, Employment: -49.2 ten thousands persons
 - Ripple effect ⇒ Value added: -4.4 trillion yen, Employment: -84.4 ten thousands persons
- ◆ **The Go To Travel campaign mitigated 8% of declines**
 - Direct effect ⇒ Value added: 0.6 trillion yen, Employment: 11.5 ten thousands persons
 - Ripple effect ⇒ Value added: 1.2 trillion yen, Employment: 20.2 ten thousands persons

Table 4-5-3

The economic ripple effect of spending by tourists (Nationwide)

[Declining of domestic tourism expenditure]

(JPY 100million, persons)

	Direct effect	Total	Primary ripple effect	Secondary ripple effect
Production	-104,690	-217,517	-180,866	-36,652
Value added	-52,998	-114,697	-92,877	-21,820
Employment	-1,066,231	-1,872,447	-1,609,327	-263,120

[Declining of Inbound tourism expenditure]

(JPY 100million, persons)

	Direct effect	Total	Primary ripple effect	Secondary ripple effect
Production	-40,689	-88,411	-73,699	-14,712
Value added	-18,788	-44,200	-35,442	-8,758
Employment	-491,877	-843,937	-738,321	-105,615

[Go to Travel Campaign]

(JPY 100million, persons)

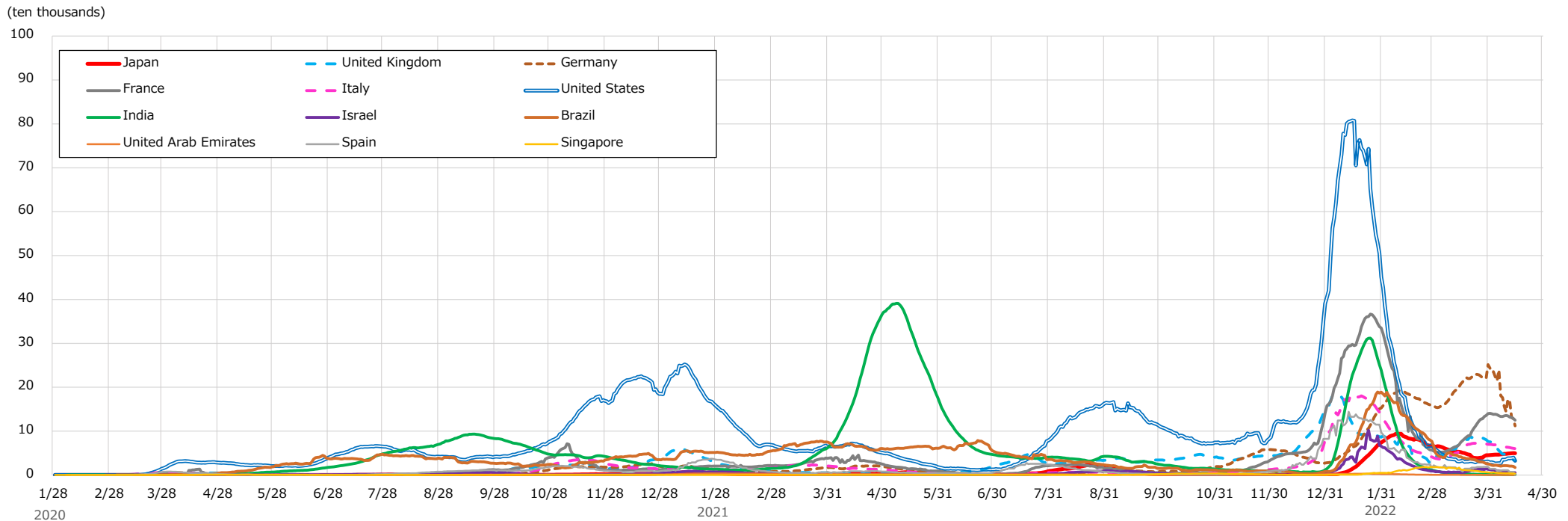
	Direct effect	Total	Primary ripple effect	Secondary ripple effect
Production	11,315	23,509	19,548	3,961
Value added	5,728	12,396	10,038	2,358
Employment	115,236	202,371	173,933	28,438

Source: Estimations by the author

Appendix

The number of new infections in countries around the world

◆ Last updated: Apr 15, 2022. The USA experienced a new COVID-19 surge caused by the new Omicron variant starting with December 2021.



GDP shares affected by the state of emergency

- ◆ On Aug 25, 2021, the state of emergency was expanded to include a total of 21 prefectures (share: 78.9%).
- ◆ The regions under the fourth state of emergency cover 80% of Japan's GDP and 90% of Kansai's GRP.

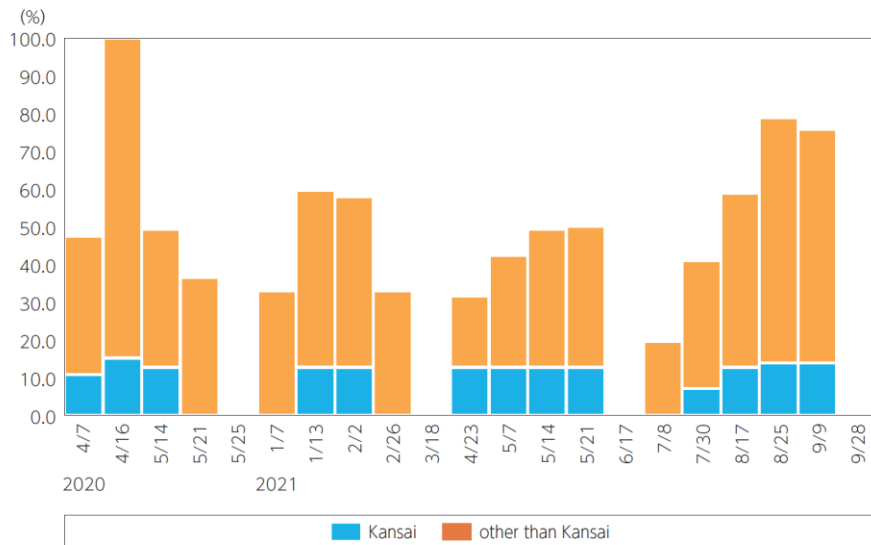


Figure 11

The national GDP share of prefectures affected by the state of emergency

Note: GRP data for each prefecture is based on nominal figures for FY2018.
Source: Prepared based on "Prefectural Accounts" (Cabinet Office)

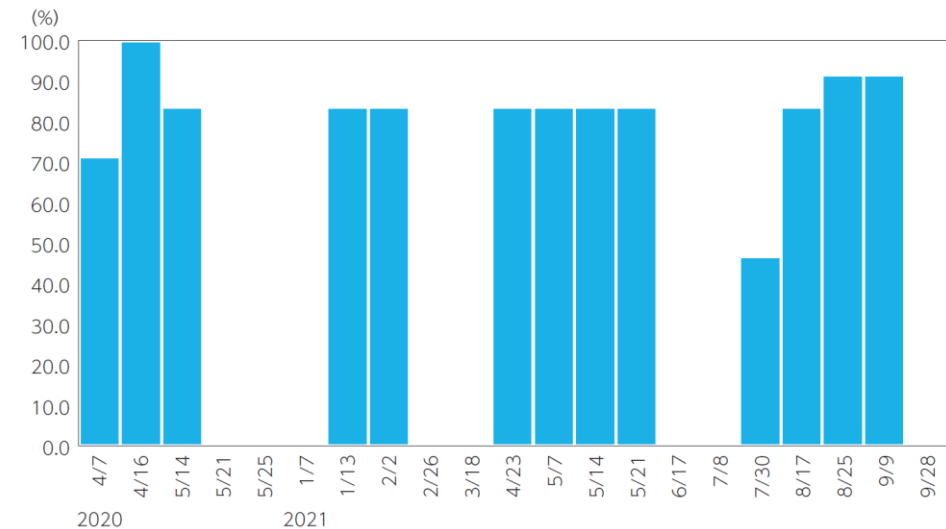


Figure 12

The Kansai GRP share of prefectures affected by the state of emergency

Note: GRP data for each prefecture is based on nominal figures for FY2018.
Source: Prepared based on "Prefectural Accounts" (Cabinet Office)

COVID-19 situation in Kansai

- ◆ In Kansai, Osaka Prefecture saw a sharp uptick in the number of infections during sixth waves.
- ◆ The healthcare system in Kansai was under severe pressure. During the 3rd SoE, the critical care beds occupancy rates in Osaka Prefecture exceeded 100%, while in Hyogo Prefecture it rose to 83%.

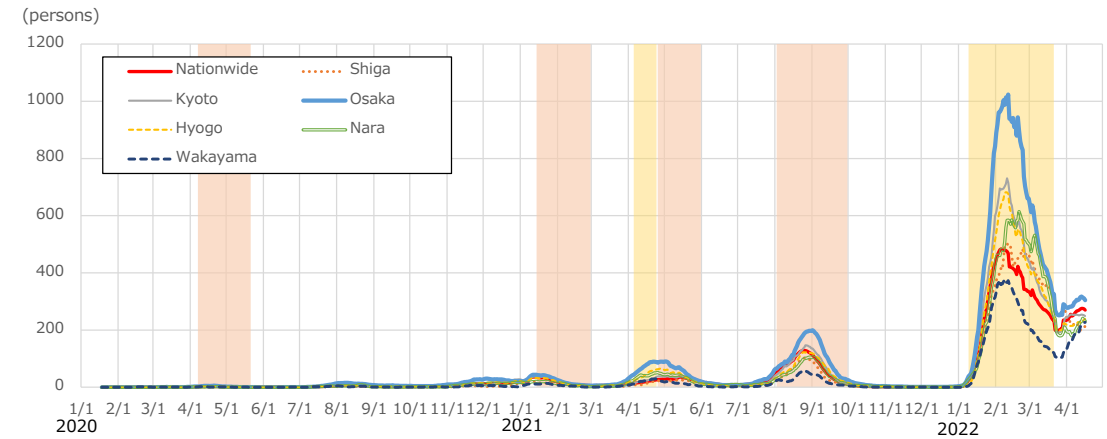


Figure 7 Number of new infections per 100,000 people in Kansai

Note: Weekly moving average. The shadowed part covers the state of emergency periods.
Source: Based on data published by the Ministry of Health, Labor and Welfare, and local authorities.

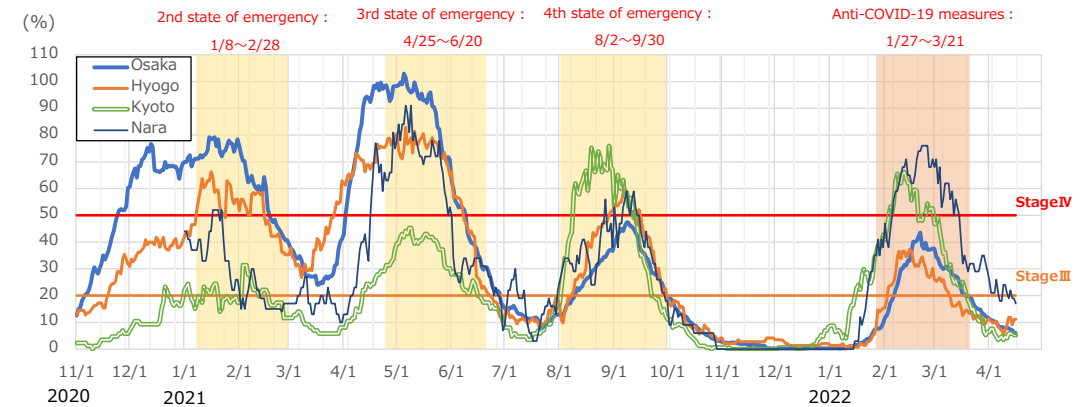


Figure 9 Critical care beds occupancy rates: Kyoto, Osaka, Hyogo, and Nara prefectures

Note: The critical care beds occupancy rate is based on the standards set by each prefecture. Each stage is a standard set by a government subcommittee until November 8, 2021.
Source: Data published by local authorities.



**Thank you for your
attention!**

APIR