

General Information of Tourism Statistics in Japan

March 22, 2013

Japan Tourism Agency

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1. Introduction of Tourism Statistics in Japan

Tourism Nation Promotion Basic Law: Enacted in December 2006

Article 25: The national government shall take measures required for maintaining **statistics concerning tourism-related consumption, statistics concerning tourist accommodations, and other tourism-related statistics**, in order to help develop and implement measures relating to the realization of a tourism nation.

Tourism Nation Promotion Basic Plan: Established in March 2012

○ Maintenance of tourism-related statistics

- Implementation of economic surveys of regional tourism in cooperation with the economic censuses
- Application of common statistical standards for inbound tourists in all prefectures
- Understanding diversifying forms of accommodation
- Promoting utilization of tourism statistics

- UNWTO is an international tourism organization (established in December 2003 as a special UN organization).
- It is making efforts to promote international comparisons of tourism statistics.

Definition of tourist

- A traveler who goes to and stays in a non-everyday place for less than one year for business, leisure, or other personal purposes.
- Tourists are classified as domestic tourists (those who travel within their country), inbound tourists (foreign residents who visit the country), and outbound tourists (domestic residents who travel abroad).

TSA (Tourism Satellite Account)

- TSA is an account used to understand tourism economy systematically within the framework of the System of National Account (SNA).
 - Satellite accounts provide an adjunct framework in response to new economic activities that cannot be categorized within the traditional framework. They systematically position new activities within the SNA. In Japan, satellite accounts are being tested in environmental, nursing, NPO, and other fields.
- * Japan is recognized as a country that has introduced a TSA system.

[Reference] TSA (Tourism Satellite Account) as part of national accounts

- A TSA is used when estimating the tourism market size from travel/tourism consumption trend surveys.
- The various statistical surveys conducted by the Tourism Agency also aim to establish principle indicators for TSAs.

10 principle indicators that should be maintained within TSAs

1. Tourism consumption expenses (domestic expenses during visits to Japan)
2. Tourism consumption expenses (domestic travels + domestic expenses for travels abroad)
3. Tourism consumption expenses (expenses overseas for travels abroad)
4. Tourism consumption expenses (total domestic expenses)
5. Production accounts
6. Domestic supply and tourism consumption
7. Tourism employment
8. Tourism gross fixed capital formation
9. Collective consumption from tourism
10. Non-monetary indicators

➤ Added value created by the tourism industry
Accumulation of added value from each industry that comprises the tourism industry

Tourism GDP

➤ Number of employees in each industry that comprises the tourism industry

Tourism employment

Inter-industrial and international comparison is possible.

■ Definition of tourism as it is handled in tourism statistics

- Tourism - **Travel to a non-everyday area for whatever purpose**, such as leisure, recreation, or business
- Overnight travel - Any travel including a **stay of one or more nights** at a place away from home
- Single-day travel - A travel to **a non-everyday area the one-way distance** of which is **at least 80 km** or the time (move + stay) required for which is **at least 8 hours**.

* The above definition is used for travel/tourism consumption trend surveys.

■ What can be learned from tourism statistics?

- **Number of people who stayed at** hotels, inns, and other **accommodation facilities** (statistics on overnight travels in 2007 onward)
- **Amount of domestic travel/tourism consumptions** (travel/tourism consumption trend surveys in 2003 onward)
- **Number of inbound tourists and tourism consumptions** by prefecture (from 2010 onward)

■ How should results of tourism statistics be utilized?

- By accurately understanding **the economic effects of tourism**, the government can clarify the degree of tourism's contribution to the country and local regions and utilize the obtained information when **developing policies or engaging in marketing activities**.

The principal official statistics concerning tourism are as follows:1

* Statistics/surveys conducted by the Tourism Agency are shown in red.

Inbound/outbound tourism

○ Number of Inbound Tourists

... Released monthly by the Japan National Tourism Organization (JNTO)

○ Number of Japanese Tourists Who Travel Abroad

... Release monthly by JNTO

○ JNTO Survey on Travel Destinations by Foreigners Visiting Japan

... A survey about foreign visitors' visitation rates by prefecture, purposes of visits, etc. **This survey has ended.*

○ Consumption Trend Survey for Foreigners Visiting Japan (general statistics)

... Tourism consumptions (transportation, accommodation, and other expenses) and related matters of foreign visitors to Japan are surveyed and results arranged by nationality, quarterly period, and region are released.

Domestic tourism

○ National Tourism Survey (general statistics)

... These surveys concern consumptions for domestic travels, the number of overnight travels by Japanese people, etc. Based on these surveys, the ripple effects of tourism on production and the TSA are also analyzed and the results are released.

○ Accommodation Survey (general statistics)

... The total and actual numbers of guests lodging in each region, capacity and room occupancy rates, etc. are surveyed quarterly and results are released.

○ Statistics on Inbound Tourists by Prefecture

... In 2010, the Tourism Agency established common standards for statistical methods used to understand the trends in inbound tourists, and individual prefectures began surveys based on these standards. In the future, comparison among regions will be possible.

Tourism-related industries

○ Status of handling by major travel agents

... Information on total proceeds, agent organized travel turnover status, etc. is released.

○ Survey on Status of Ryokan (Japanese-style inn) Operation

... Based on the results of hotel business surveys conducted by the Japan Ryokan & Hotel Association, the trends in region-specific capacity occupancy rate, etc. are released.

○ Regional Tourism Economic Survey

... The purpose of this survey is to understand the basic structure of tourism industry (number of business operators, turnover size, employment/work status, etc.).

Maintenance of statistics handled by the Tourism Agency is promoted as follows:

Efforts made by fiscal 2011

Accommodation Survey (quarterly)

- Understand trends in lodging at accommodation facilities
- Conducted as general statistics approved by the Ministry of Internal Affairs and Communications in 2007 onward

Enhanced
in 2010

Available at present

- The survey target now includes accommodation facilities with fewer than 10 employees.
- Earlier release is achieved.
- Understanding of trends in new key VJC markets (India, Russia, and Malaysia)

National Tourism Survey (quarterly)

- The numbers of Japanese people's travels and nights spent during travels and the ripple effect of tourism consumption on economy are calculated. This survey has been conducted as general statistics since 2003.

Enhanced
in 2010

Available at present

- Increase the number of samples to understand amount of tourism consumption and liquidity by region, quarter, etc.
- Earlier release is achieved (release of quick estimation)

Consumption Trend Survey for Foreigners Visiting Japan (quarterly)

- Conducted as general statistics in 2010 onward
- Understand amounts of travel consumptions by foreigners visiting Japan classified by nationality, etc.

Enhanced
in 2011

Available at present

- Understand trends in consumptions by foreigners visiting Japan classified by nationality, percentages of repeat visitors, needs for visiting Japan, etc.
- The destinations are included in the survey questions since fiscal 2011.

Regional Tourism Economic Survey

- Preparation is going on for a full-scale survey to be conducted in fiscal 2012.

Start
in 2010

Preparation and study in progress

- A preparatory survey is being conducted to verify survey methods used to understand the basic structure of the tourism industry (number of business operators, turnover size, employment/work status, etc.).

Statistics on Inbound Tourists by Prefecture (quarterly)

- The survey method for prefectural tourism statistics (number of inbound tourists and tourism consumption amounts) is not standardized, so survey result comparison among prefectures is impossible.

Standardi-
zation

Partially available

- In December 2009, the Tourism Agency established the common standards for statistics on inbound tourists so that survey data can be compared among prefectures.
- In April 2010 onward, prefectures conduct surveys based on the common standards.
 - ⇒ The Tourism Agency sums up prefectural data into national data and releases the results.

2. Accommodation Survey

Survey overview

Statistics surveys are conducted (continued since 2007) on accommodation facilities in order to clarify the actual conditions of overnight travels in Japan.

Survey overview

[Target facilities]

Hotels, lodgments, resort facilities, etc. over the country

[Survey periods]

Quarterly (Jan. to Mar., Apr. to Jun., Jul. to Sep. and Oct. to Dec.)

[Survey method]

A questionnaire is mailed and the answers are examined.

[Survey items]

Basic items
Facility type, number of rooms, etc.

+

Guest status
Japanese or foreigner, number of guests, guest's place of residence (nationality for a foreigner), etc.

[Facility sampling method] Sampling stratified by the number of employees and prefecture

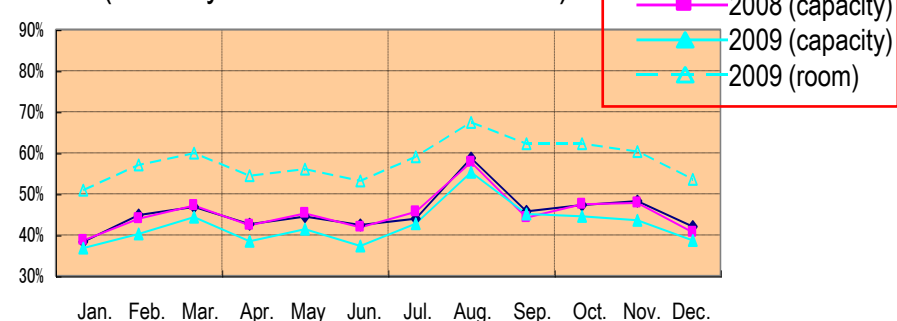
No. of employees	Sample size	Sampling ratio
10 or more	About 10,000 accommodation facilities	All accommodation facilities (exhaustive survey)
5 to 9	About 10,000 accommodation facilities	1/3
0 to 4	About 30,000 accommodation facilities	1/9



Effects

- Plan and develop correct tourism measures for particular regions and verify results.
 - More appropriately allocate resources based on actual regional accommodation conditions.
 - Understand the influence of natural disasters, harmful rumors, etc. on tourism industry and analyze the ripple effects of tourism on local economy.
- Activate private business.
 - Appropriately locate facilities and develop investment plans based on demand forecast and other information, etc.

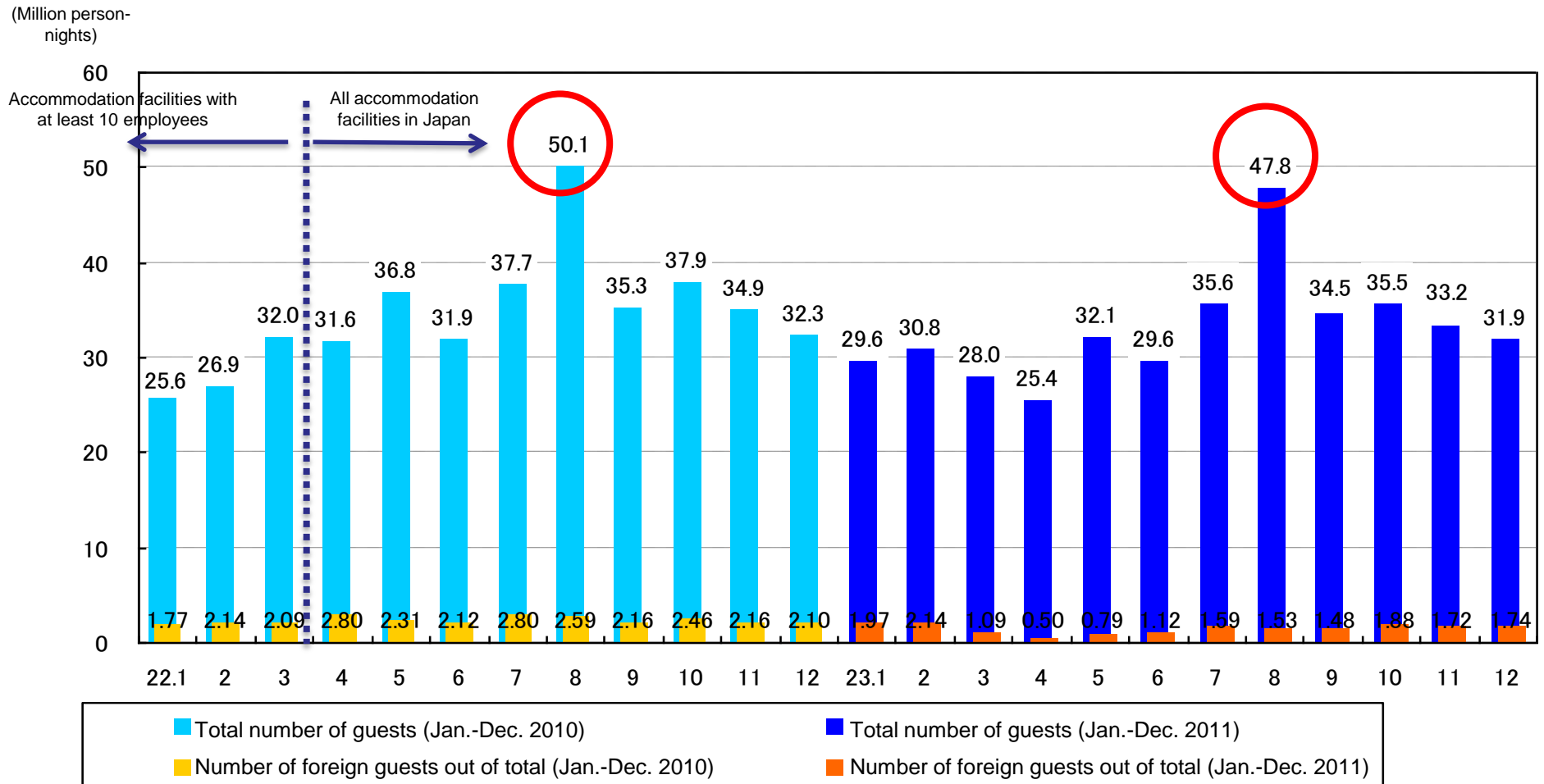
Changes in capacity and room occupancy ratios (January 2007 to December 2009)



[Output example 1] Changes in the monthly total number of guests

- The number of guests in Japan peaks in August when people take summer vacations.

Changes in the total number of guests (January 2010 to December 2011)

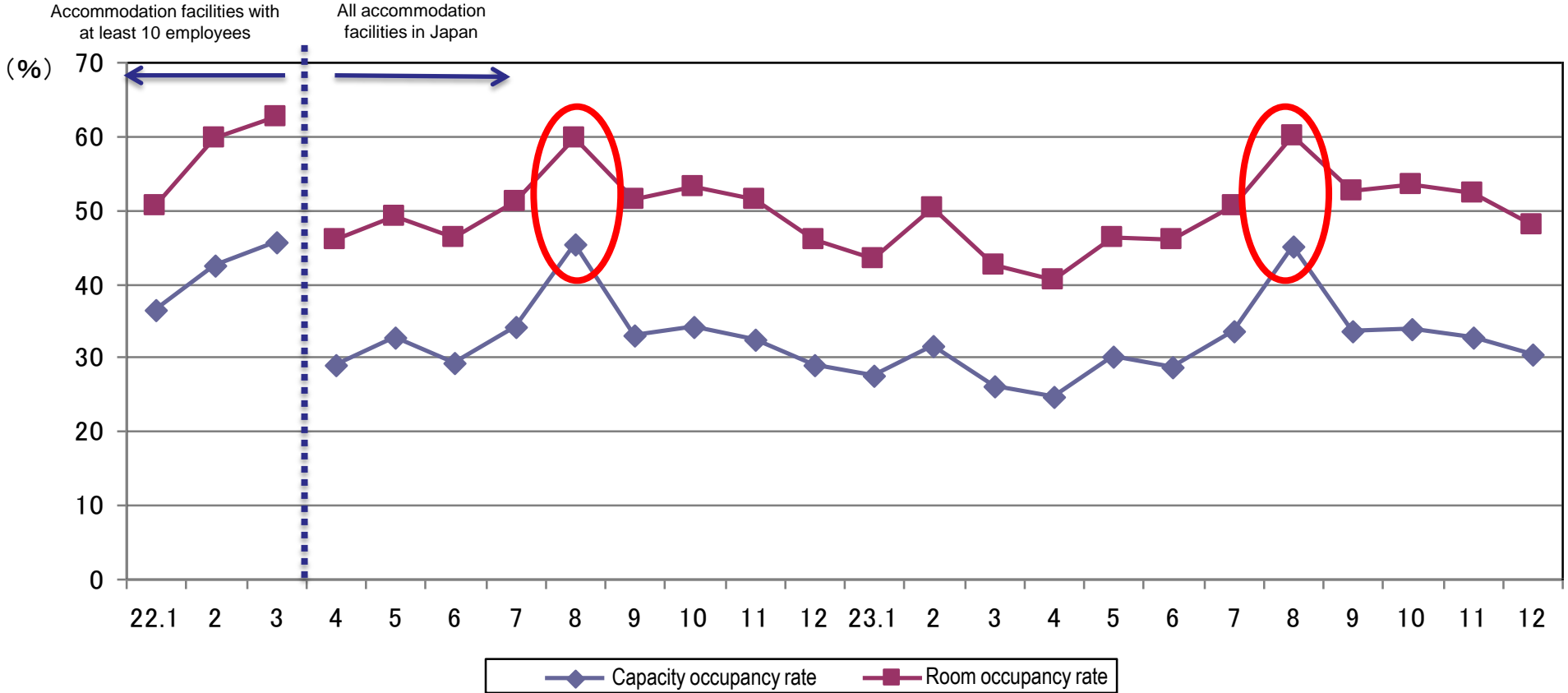


* The Jan. to Dec. 2010 values are confirmed. The Jan. to Dec. 2011 values are based on tentative 1st, 2nd, 3rd, and 4th quarterly values.

[Output example 2] Changes in monthly accommodation facility occupancy rates

■ A similar tendency is also observed in the time-series changes in monthly **capacity and room occupancy rates**.

Changes in capacity and room occupancy rates (January 2010 to December 2011)

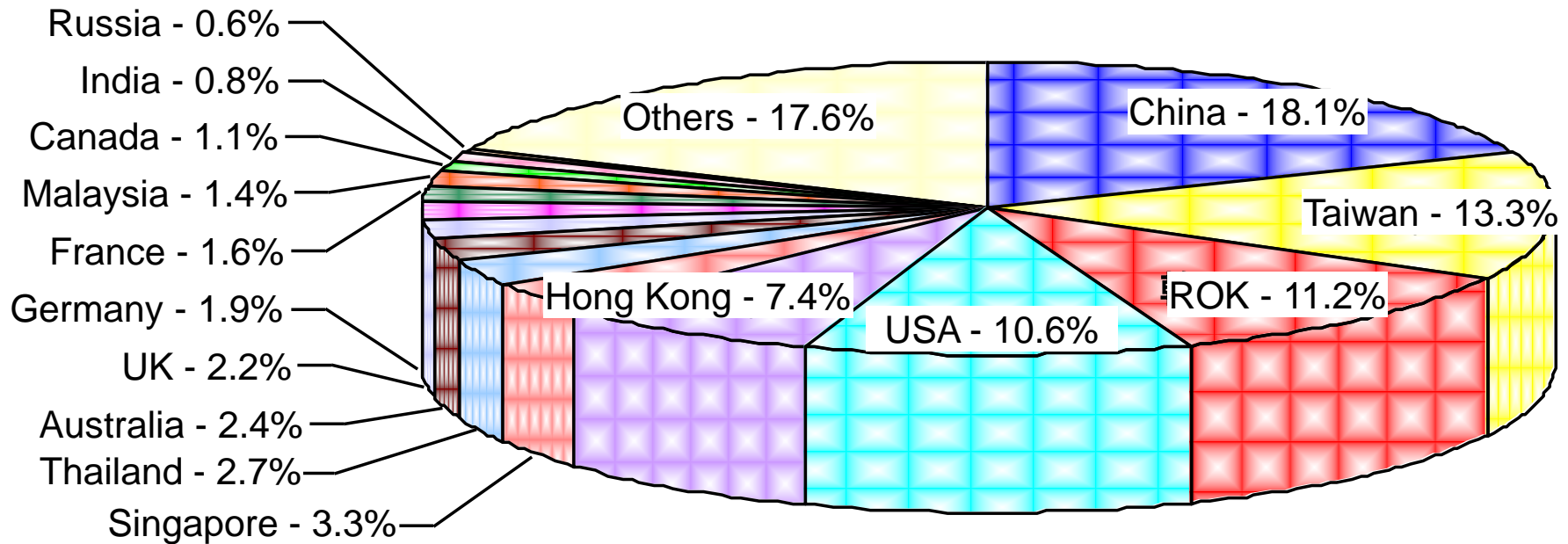


* The Jan. to Dec. 2010 values are confirmed. The Jan. to Dec. 2011 values are based on tentative 1st, 2nd, 3rd, and 4th quarterly values.

[Output example 3] Number of guests by nationality (shares in %)

- China, Taiwan, and the Republic of Korea (ROK) rank first, second, and third, respectively, in the total number of foreigner accommodation guests. Guests from the top three countries represent more than 40% of all foreign guests.

Total number of guests by nationality (4th quarter of 2011)

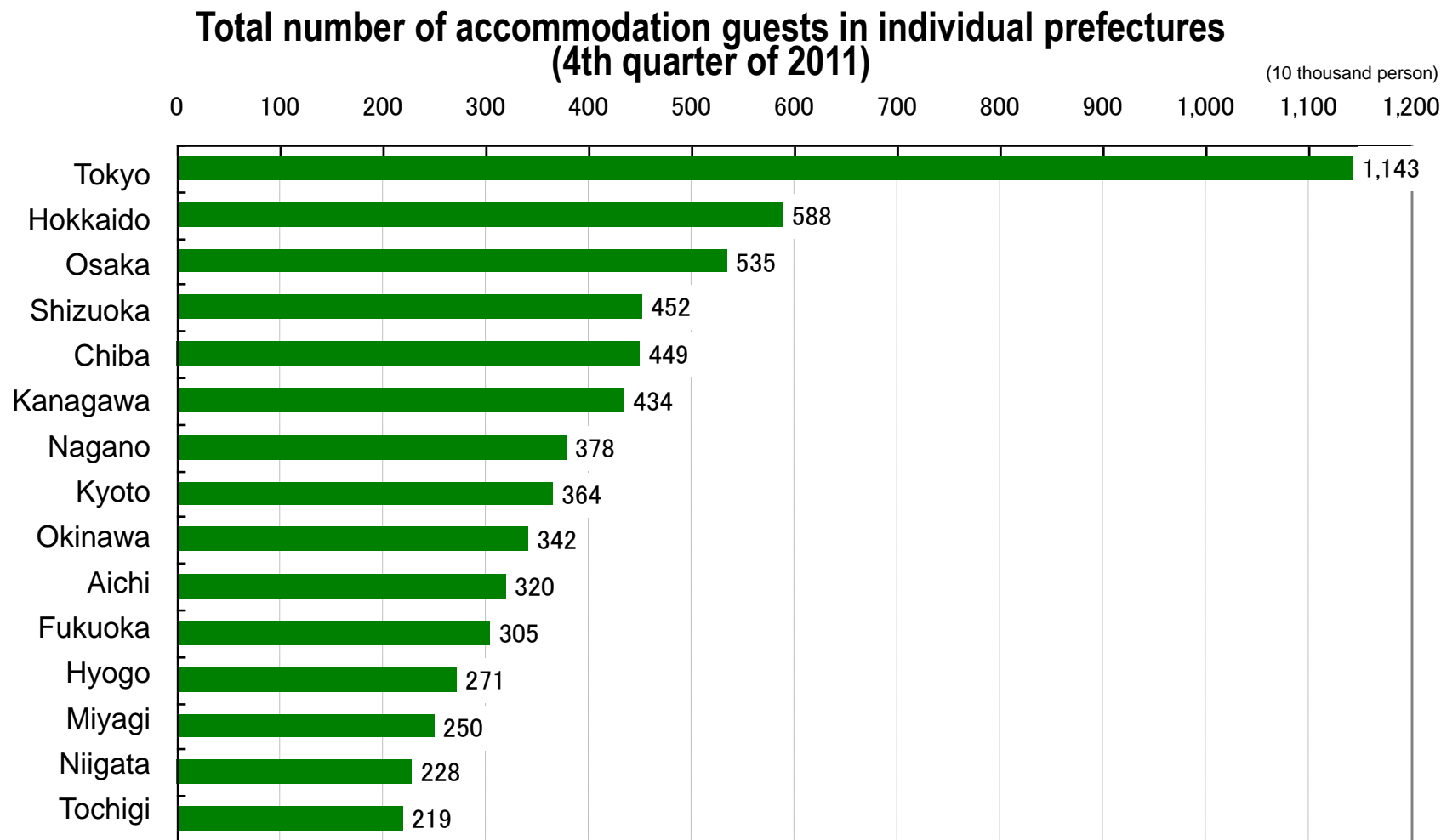


* Prepared based on the result of a survey conducted on facilities with at least 10 employees.

* Based on tentative 2011 4th quarter values

[Output example 4] Total number of guests in individual prefectures

- Tokyo, Hokkaido, Osaka, Shizuoka, and Chiba rank first, second, third, fourth, and fifth, respectively, in the total number of guests in a particular prefecture. Guests in the top five prefectures represent over 30% of all guests.

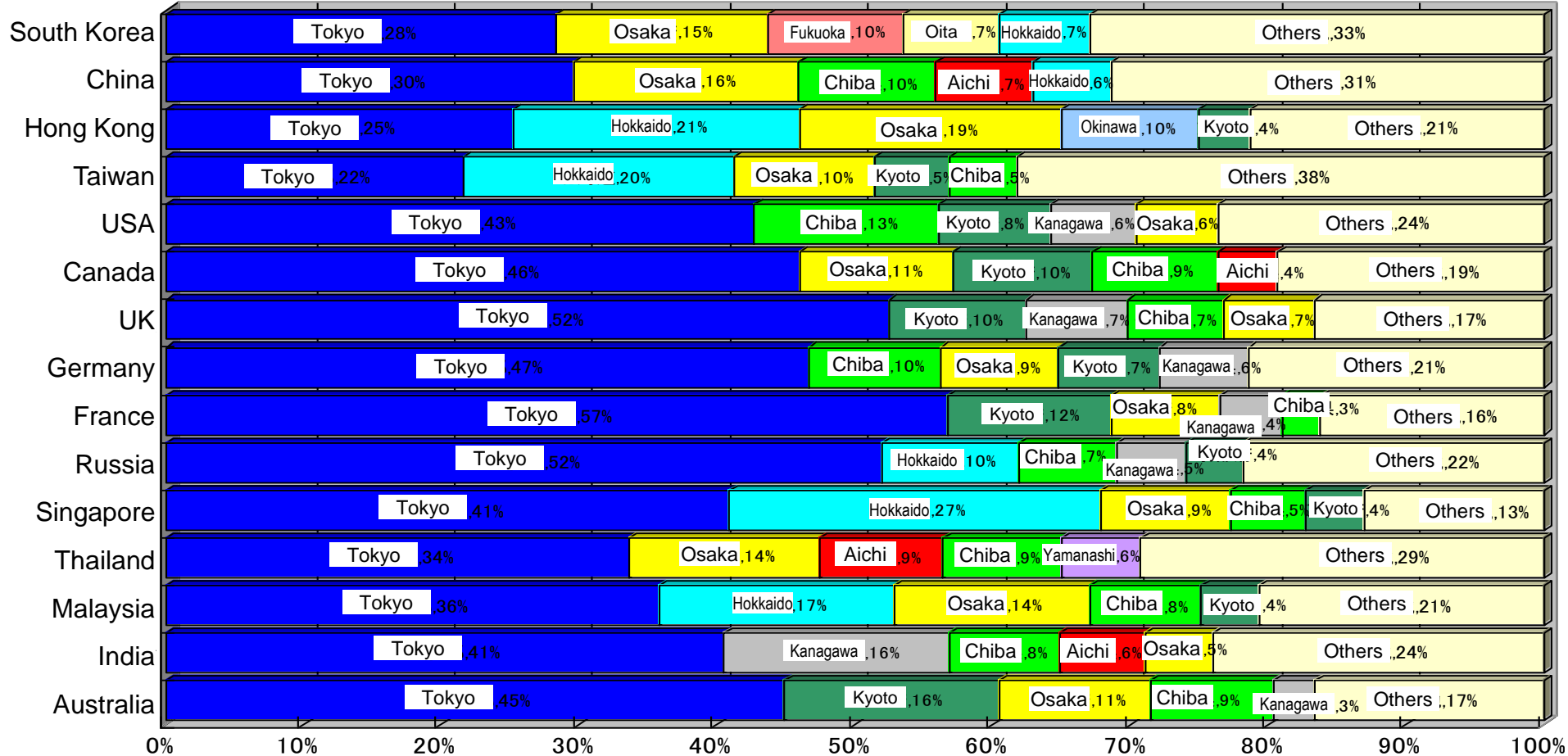


* Based on tentative 2011 4th quarter values

[Output example 5] Breakdown of the total number of foreign guests into destination prefectures

- In general, most guests stay in Tokyo, Osaka, and other large cities.
- It is noteworthy that guests from Hong Kong and Taiwan often stay in Hokkaido, whereas guests from Europe often stay in Kyoto.

Breakdown of the total number of foreign guests into destination prefectures (4th quarter of 2011)



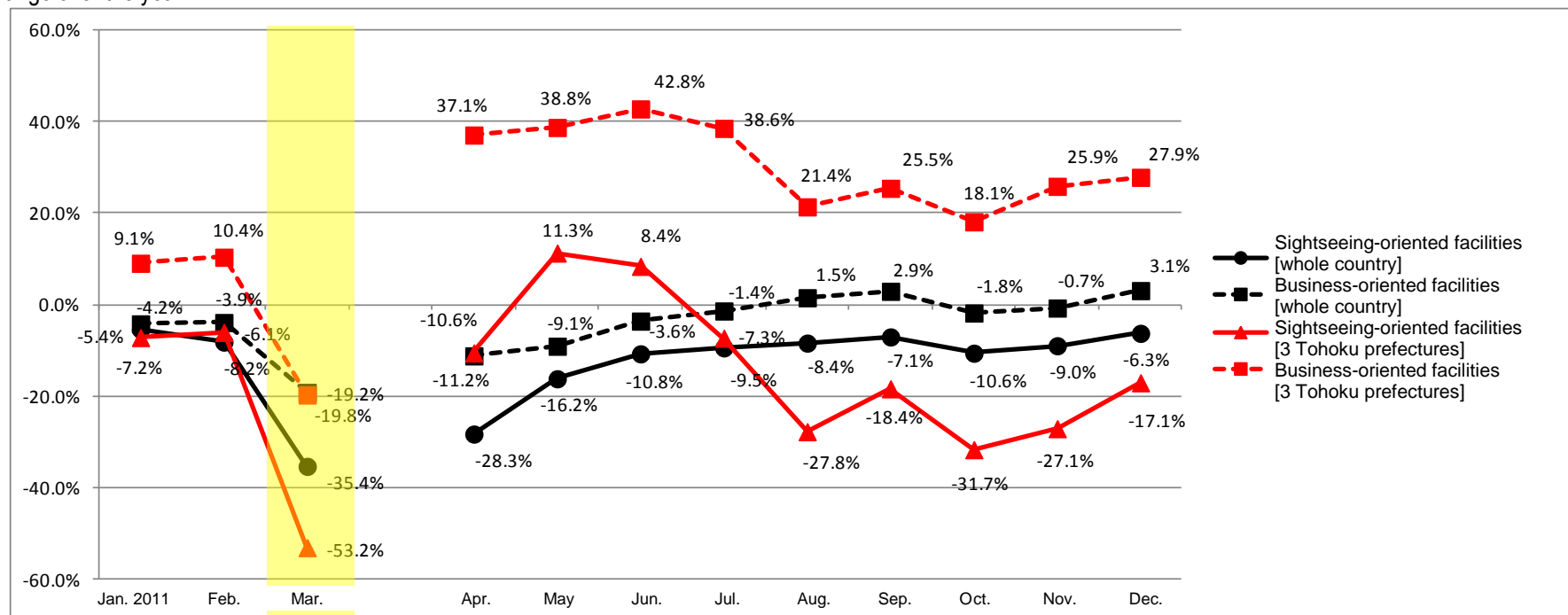
* Prepared based on the result of a survey conducted on facilities with at least 10 employees.

* Based on tentative 2011 4th quarter values

[Output example 6] Breakdown of accommodation guests by purpose

- The % change over the year in the number of guests at business-oriented accommodation facilities (*1) in the three Tohoku prefectures (Iwate, Miyagi, and Fukushima) is significantly positive in April onward. This suggests that, for the earthquake disaster and related reasons, many affected people and people engaged in recovery and restoration used accommodation facilities.
- It may be considered that sightseeing-oriented facilities (*2) also had similar accommodation demand. However, the % change over the year has stayed negative since July. This suggests that after affected people and others left these facilities, tourism demand has not recovered adequately.

% change over the year



Note: The Jan. to Mar. values concern facilities with at least 10 employees and the Apr. to Dec. values concern all facilities, including those with nine or fewer employees.

*1 Facilities that answered that sightseeing guests were less than 50% of all guests.

*2 Facilities that answered that sightseeing guests were at least 50% of all guests.

3. National Tourism Survey

Survey Overview

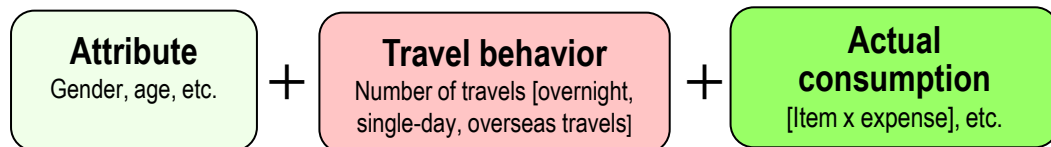
Purpose

To develop materials based on the amount of travel/tourism consumption in Japan for estimating and analyzing economic ripple effects as well as for tourism planning/policymaking.

Overview

Conduct a survey of 25,000 people per year in order to understand how Japanese people travel within Japan and abroad, how much they spend for traveling, etc. Based on the data obtained through the survey, estimate the travel/tourism consumption amounts in Japan and create a TSA.

- ◆ Survey frequency: Four times a year
- ◆ Target: Japanese people randomly sampled from the Basic Resident Register
- ◆ Method: Questionnaire distribution and collection by mail
- ◆ Sample size: 50,000 (25,000 persons x 2 times)
- ◆ Survey items

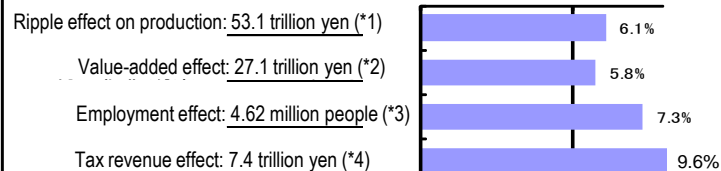


Travel consumption of 25.5 trillion yen (direct effects of 24.4 trillion yen on domestic industries)



Direct effects
 Added values of 12.3 trillion yen (2.6% of GDP)
 Employment of 2.51 million people (4.0% of all employment)
 Tax revenue of 3.4 trillion yen (4.5% of all tax revenue)

Ripple effects

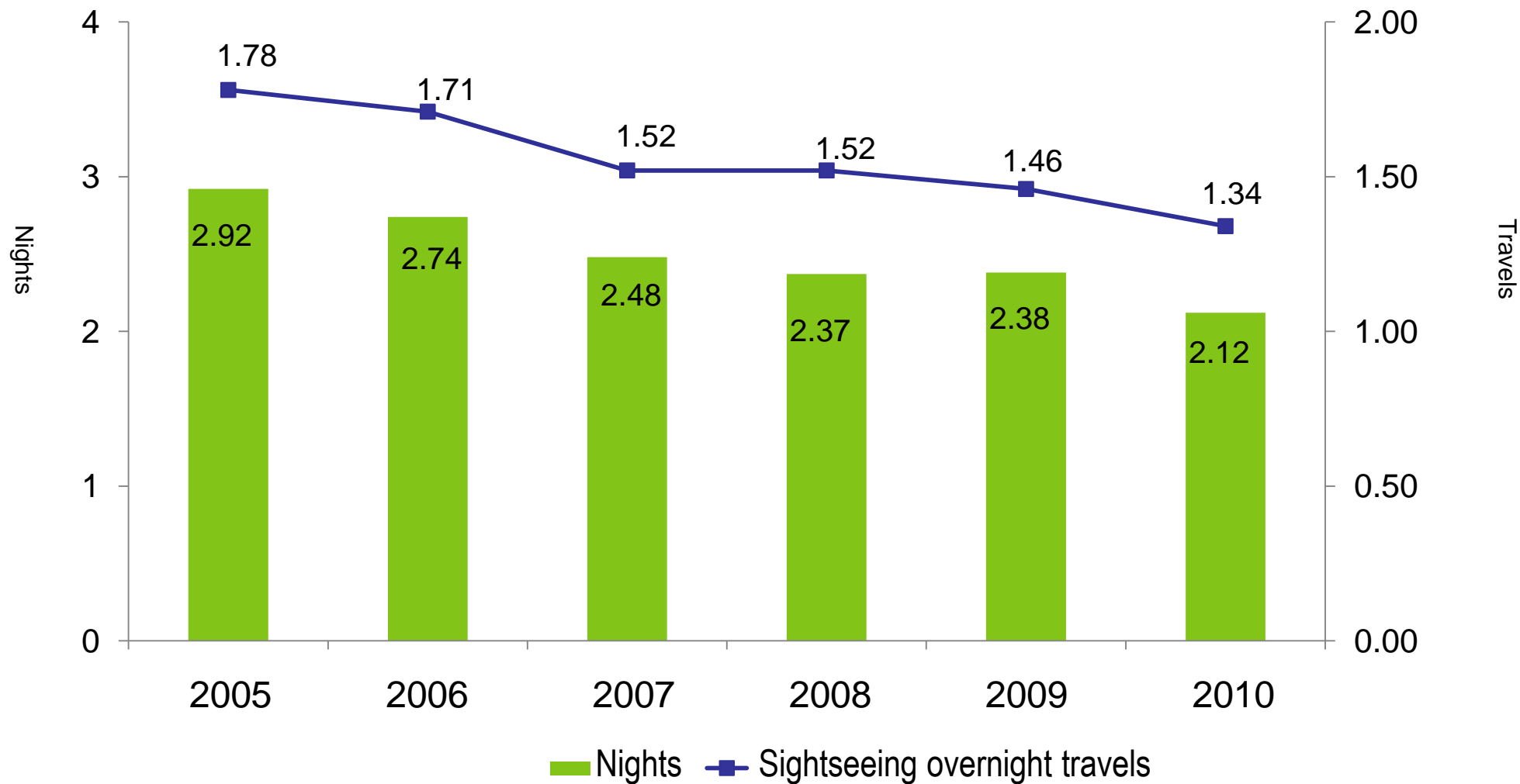


*1 Relative to the gross domestic output of 874.3 trillion yen in the SNA.
 *2 Relative to the nominal GDP of 470.9 trillion yen in the SNA.
 *3 Relative to the employment of 63.28 million people in the SNA.
 *4 Relative to the national + local tax of 76.4 trillion yen in the SNA.
 *5 The contribution referred to here means the percentage of the effects over all industries.

Effects

- It is possible to understand Japanese people's actual travel behavior by learning Japanese people's consumption for each category of items, average number per year of travels for each purpose, average number of nights spent during travels, etc.
- It is possible to perform international comparison in the output and added values of travel and tourism industries by using survey results when creating UNWTO-advocated TSAs (Tourism Satellite Accounts).

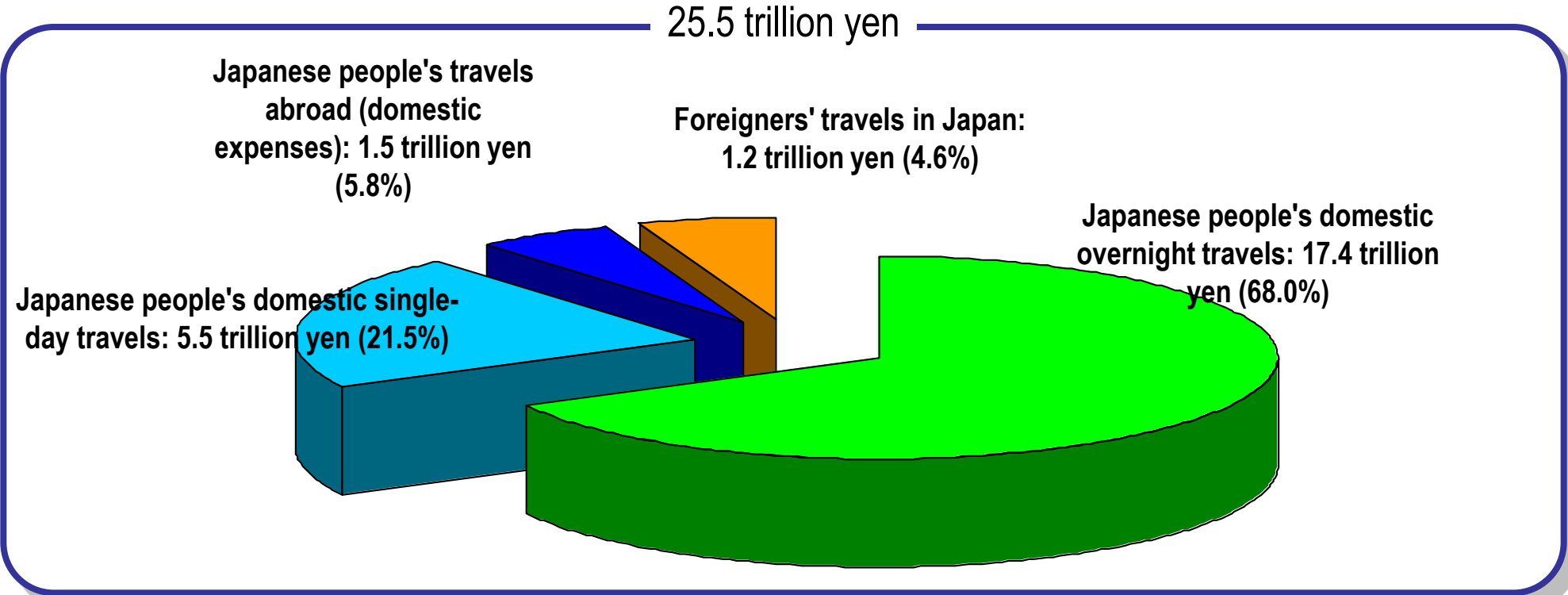
Changes in the number of domestic sightseeing overnight travels and the number of nights spent during travels per person



Note: Up to 2008, the survey target was people aged between 20 and 79. Since 2009, it is people of any age.

Source: Japan Tourism Agency "National Tourism Survey"

[Output example 2] Domestic tourism market size (2009)

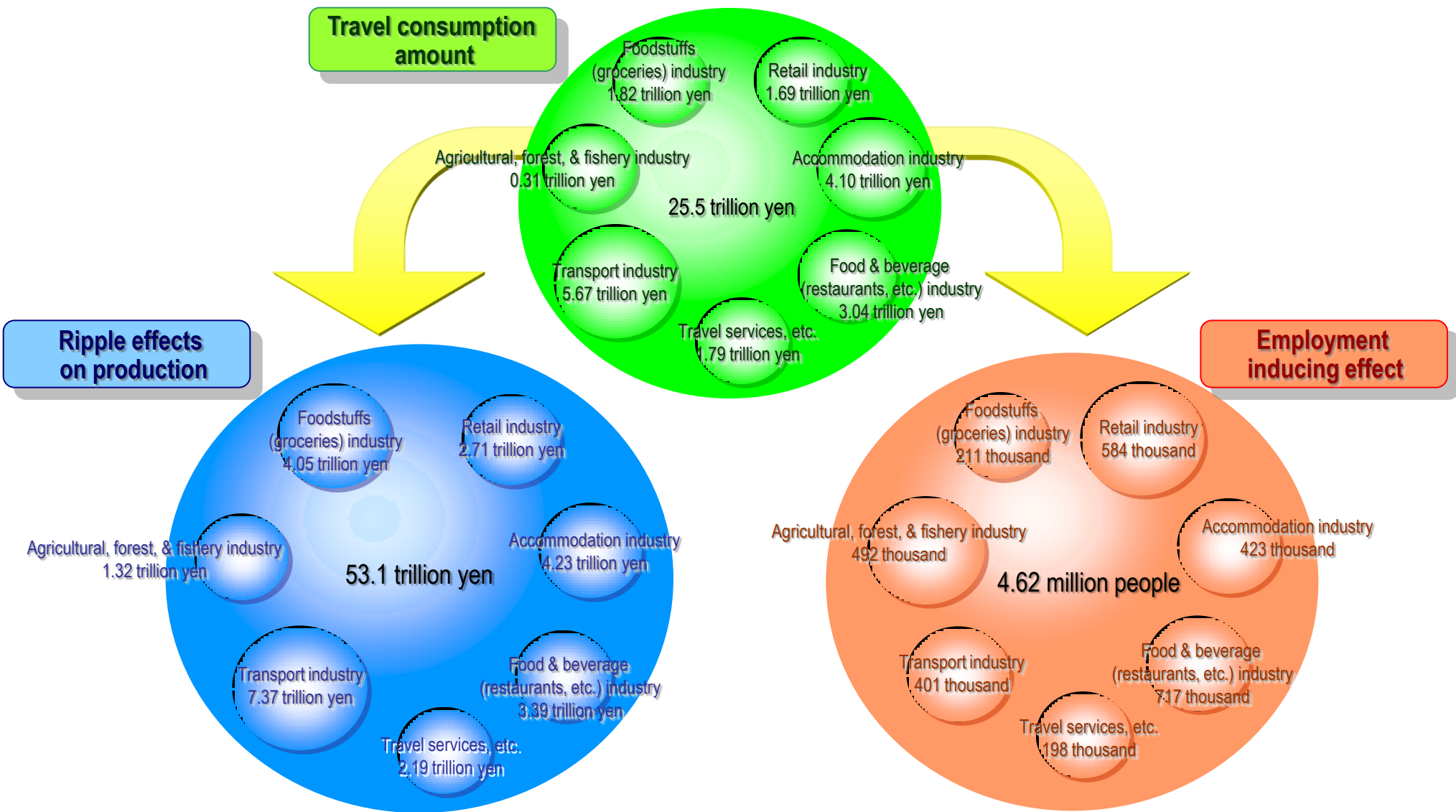


Contribution to Japanese economy (economic effect)

Ripple effect on production:	53.1 trillion yen	(6.1% of gross domestic output in SNA)
Value-added inducing effect:	27.1 trillion yen	(5.8% of nominal GDP)
Employment inducing effect:	4.62 million	(7.3% of employment over the country)
Tax revenue effect:	7.4 trillion yen	(9.6% of national and local tax)

Source: Japan Tourism Agency's press release dated April 28, 2011

Economic effect of tourism on industries in Japan (2009)

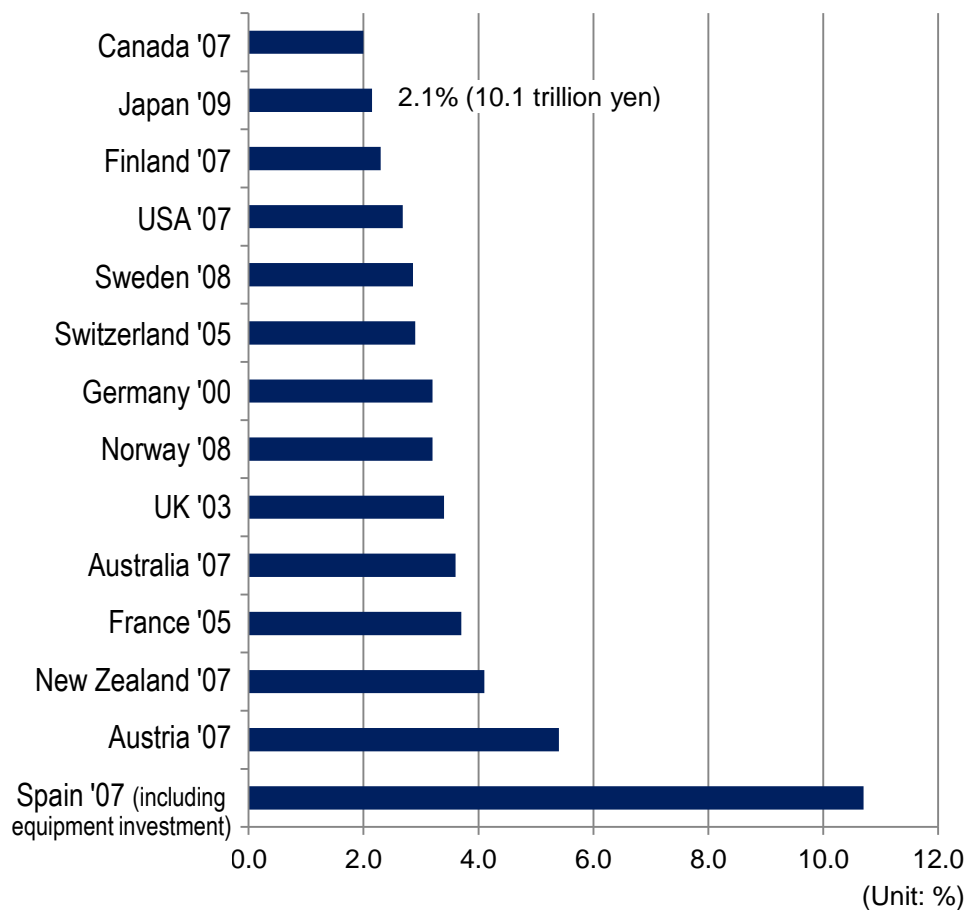


◆Ripple effects on production
 Ripple effect on production is defined as an effect that is produced over the entire industry as the result of new demand. (For example, consumption for travels or sightseeing will increase the revenue of the suppliers of the raw or intermediate material involved in the travel or sightseeing and increase the salaries of employees of the suppliers, thereby initiating new production over the entire industry. Such consequential effects are included in the ripple effects on production.)

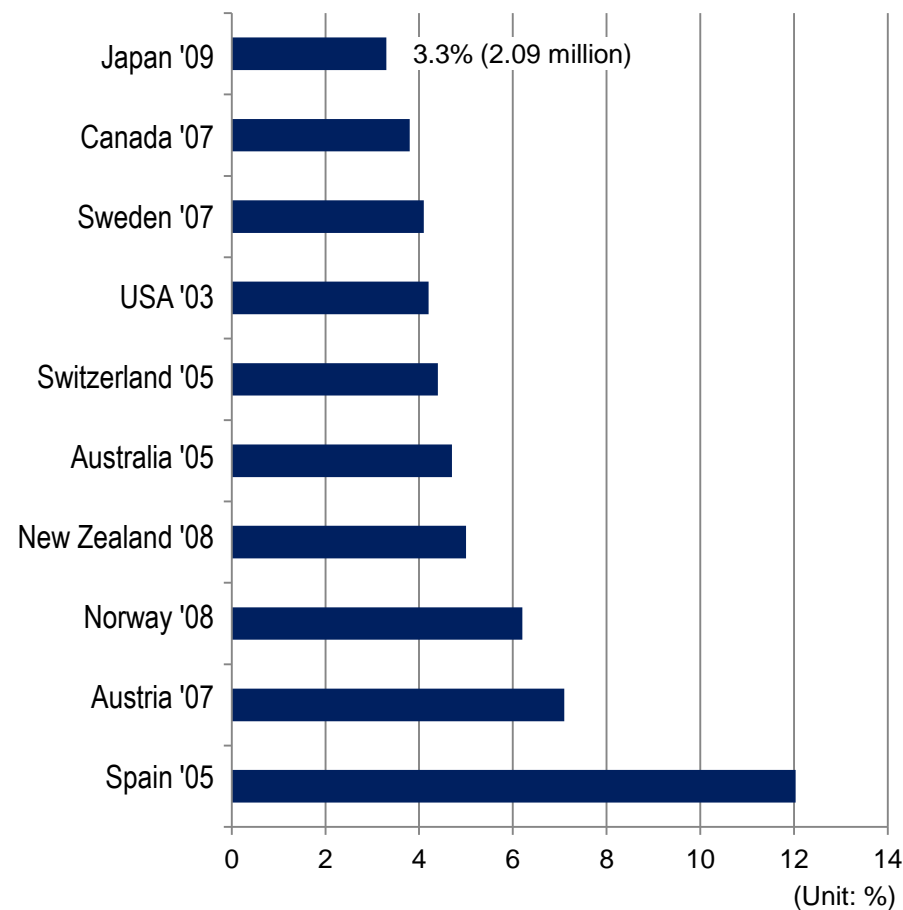
Source: Japan Tourism Agency "National Tourism Survey"

- The percentage of the tourism industry's contribution to the GDP in Japan is lower than in other developed countries.
- Similarly, the employment share of the tourism industry is also lower.

<Share of tourism in GDP>



<Employment share of tourism industry>



- ① Travel consumption amount (domestic consumption amount)
Estimated to be 25.5 trillion yen as the result of accumulating values obtained from the travel/tourism consumption trend surveys, etc.
Japanese people: Travel/tourism consumption trend surveys, etc.
Foreign visitors to Japan: Estimation based on proportional evaluation of values in JNTO surveys on consumption trends of foreign visitors to Japan, based on the International Balance of Payments Statistics
- ② Tourism GDP
Estimated to be 10.1 trillion yen in total as the result of multiplying the travel consumption amount by industry (①) by the value added ratio.
Value added ratio = value added/domestic output (by industry) ... estimated from the SNA.
- ③ Tourism GDP ratio
Tourism GDP ratio = tourism GDP (10.1 trillion yen)(②)/nominal GDP (470.9 trillion yen in the SNA) = 2.1%
- ④ Tourism employment
Estimated to be 2.09 million in total as the result of multiplying the travel consumption amount (①) of each industry by the employment coefficient.
Employment coefficient of industry = number of employees/domestic output (by industry) ... estimated from the inter-industrial relations table
- ⑤ Tourism employment ratio
Tourism employment ratio = tourism employment (2.09 million) (④)/total employment (63.28 million) (SNA) = 3.3%

4. Consumption Trend Survey for Foreigners Visiting Japan

Survey Overview

○ Statistics survey on actual consumptions of foreign visitors to Japan is conducted to accurately understand travel trends of foreign visitors to Japan.

Overview

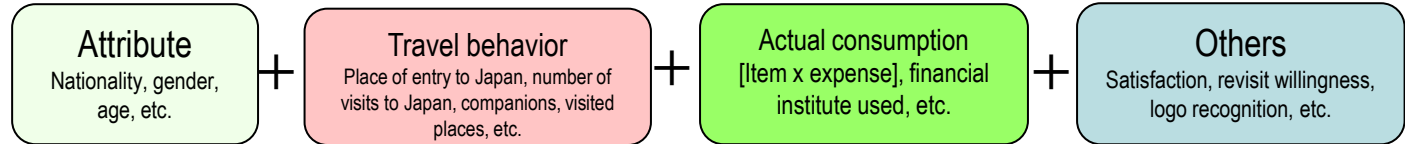
A statistic survey is conducted to understand tourism consumptions (transport, accommodation, and other expenses), fluidity, etc. of foreign visitors to Japan (mainly from 15 countries/regions included in the key VJC markets) in a way that obtained information is arranged by nationality, quarter, and local block.

<Survey overview>

- ◆ Survey frequency: Four times a year
- ◆ Target: Foreigners who are about to leave Japan
- ◆ Method: Hearing by examiners
- ◆ Survey items
- ◆ Places: 11 airports/seaports
- ◆ Sample size: 26,000 in total(6,500 per quarter)



<Survey image>



Effects

○ Develop and plan tourism policies based on needs from foreign visitors to Japan and verify the results.

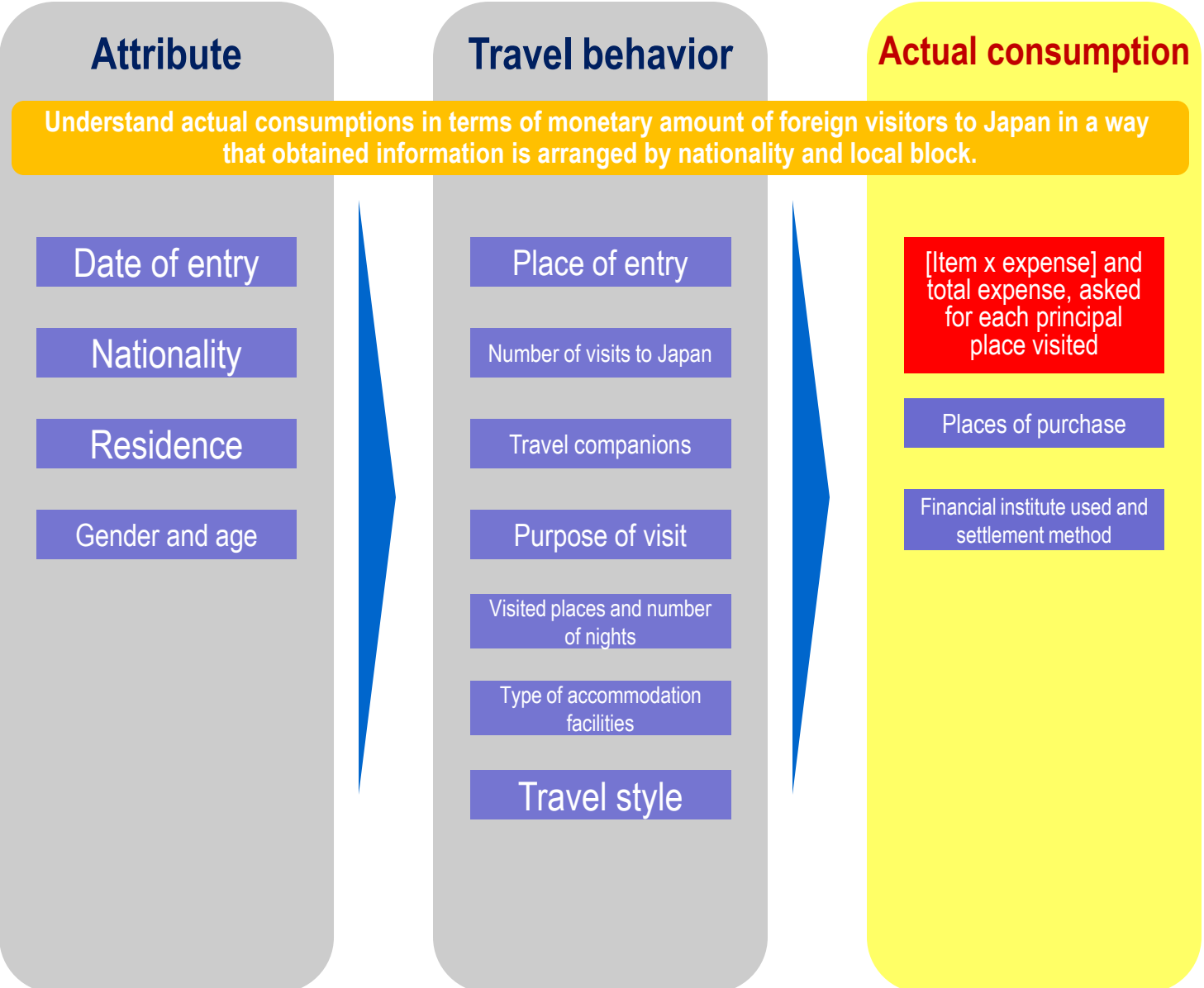
- Perform promotion activities by running PDCA cycles based on the travel trends of foreign visitors to Japan.
- Improve/maintain acceptance frameworks to suit or satisfy consumption trends and needs of foreign visitors to Japan (including the finding of nationality-specific golden routes)
- Analyze the economic ripple effects and cost-effectiveness of measures for inviting foreign tourists to Japan (on employment and tax revenue).

○ Activate business targeted at foreign visitors to Japan

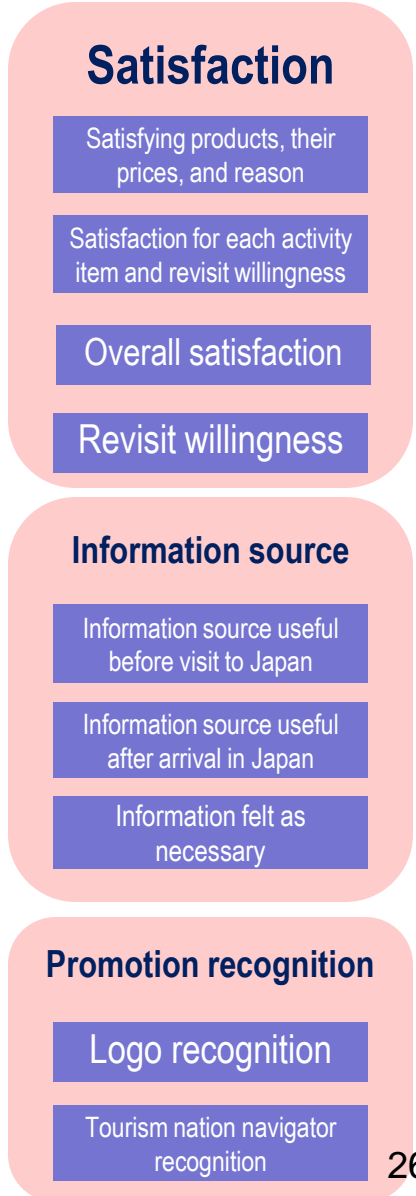
- Effectively use the results of this survey for tourism marketing (such as the development of new travel routes)
- Use the results of this survey when deciding on strategy for determining the location of commercial facilities, etc.

Survey items

General statistics (approved by the Ministry of Internal Affairs and Communications)



Awareness survey, etc.



■ Survey method

○ Target

Foreign visitors who are about to leave Japan, excluding those who have stayed here for one year or longer, permanent residents, spouses of Japanese, spouses of permanent residents, long-term residents, and other people living in Japan, transit passengers not entering Japan, and members of aircraft/ship crew.

○ Places of survey

International airline/seaway terminal boarding lobbies of principal airports/seaports (11 locations) over the country (New Chitose Airport, Sendai Airport, Narita Airport, Haneda Airport, Niigata Airport, Chubu International Airport, Kansai Airport, Hiroshima Airport, Fukuoka Airport, Naha Airport, and Hakata Seaport)

○ Time and sample size

- 1st period: Jan. 20 (Thu) to Feb. 15 (Tue), 2011 - sample size of 6,649 (including 6,498 effective for consumption amount by nationality)
- 2nd period: May 21 (Sat) to Jun. 29 (Wed), 2011 - sample size of 6,975 (including 6,886 effective for consumption amount by nationality)
- 3rd period: Jul. 21 (Thu) to Aug. 29 (Mon), 2011 - sample size of 7,030 (including 6,965 effective for consumption amount by nationality)
- 4th period: Oct. 6 (Thu) to Nov. 27 (Sun), 2011 - sample size of 6,829 (including 6,766 effective for consumption amount by nationality)

○ Method

A hearing survey is conducted by examiners who speak foreign languages using a touch-panel PC supporting 10 languages or a questionnaire. The languages are English, Korean, Traditional Chinese, Simplified Chinese, Thai, French, German, Russian, Italian, and Spanish.

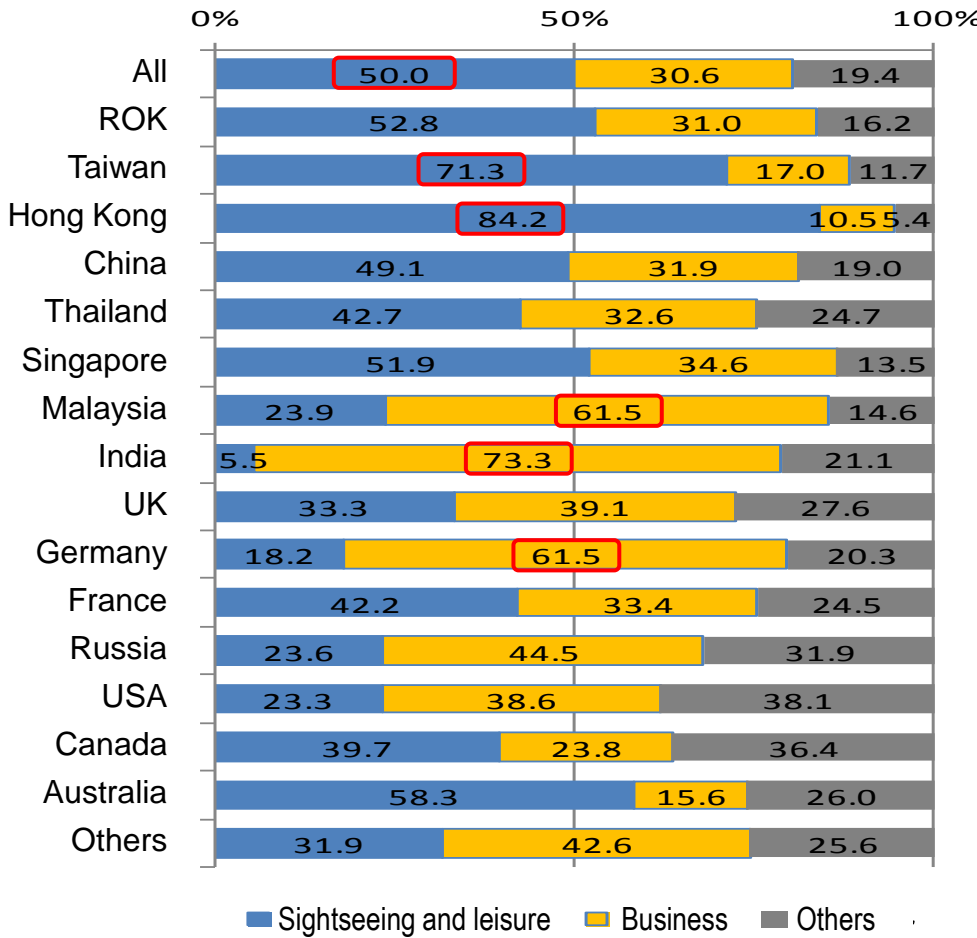
<Notes on using the results of this survey>

- The results were calculated using weighted averages based on the number of foreign visitors to Japan from each of the 15 countries/regions targeted for Visit Japan Project promotions and other countries/regions.
- The number of foreign visitors to Japan is represented by data that was estimated by the Japan National Tourism Organization (JNTO) in March 2012 based on the annual report of statistics on legal migrants, which is nationality-based statistics compiled by the Ministry of Justice.
- The foreign exchange rate data is generally represented by averages of daily data that was released by the International Monetary Fund (IMF) during the survey period. However, Taiwanese dollar and Hong Kong dollar data, which is not included in IMF data, is represented by averages created based on Federal Reserve Board (FRB) data.
- Since optional questions are not always answered by all respondents, the sample size varies from one question to another (refer to the sample size in the pertinent slide).
- Use caution when handling numeric values obtained from a small sample (refer to the sample size in the pertinent slide).

Purposes of Visits to Japan

The purpose of **one half** of all foreign visitors to Japan is **sightseeing and leisure**. Especially, the percentage of **"sightseeing and leisure"** is high among visitors from **Taiwan, Hong Kong, etc.**

In contrast, the purpose of business (exhibitions/fairs, international conferences, internal conferences (added since the Apr. to Jun. period in 2011), trainings, negotiations, or other business activities) represents 30.6% of all purposes. Especially, the percentage of **"business"** is high among visitors from **Malaysia, India, and Germany.**



Expenses spent during travel by one foreign visitor to Japan

The **expenses spent during a travel by one foreign visitor** to Japan in 2011 are estimated to be **113,917 yen on average**. The expenses prior to the travel (package tour fees or fares for the round-trip to Japan) is estimated to be 86,820 yen on average. The sum is 200,737 yen.

Data about expenses spent by travelers of each nationality during travels indicates that Russians spend the highest amount (205 thousand yen), followed by 177 thousand by Australians and 164 thousand by Chinese.

Nationality	(Persons)	(Yen/person)		(Yen/person)
	Sample size	a. Package tour fees or fares for round trip (expenses prior to travel)	b. Expenses spent during stay in Japan	c. Total expenses (= a + b)
All	27,115	86,820	113,917	200,737
ROK	5,643	46,131	63,614	109,745
Taiwan	4,860	66,795	82,508	149,302
Hong Kong	1,587	72,271	95,381	167,652
China	4,181	75,777	164,358	240,134
Thailand	900	92,482	117,963	210,445
Singapore	318	89,915	130,164	220,079
Malaysia	385	95,416	134,757	230,173
India	501	103,762	135,938	239,700
UK	739	149,482	148,897	298,379
Germany	679	161,686	131,354	293,039
France	532	149,882	147,964	297,846
Russia	325	97,001	205,207	302,208
USA	2,944	139,139	134,405	273,545
Canada	555	130,221	135,583	265,805
Australia	686	148,842	176,564	325,407
Others	2,280	148,815	159,909	308,724

Percentage of each type of souvenir by nationality (limited to main nationalities)

Data about the percentage of each type of product purchased indicates that “cakes & confections” are purchased at the highest percentage. About a half of all foreign visitors to Japan purchase cakes, followed by “other foods, alcoholic and non-alcoholic drinks, and tobaccos” and “cosmetics, medicines, and toiletries.”

Data about purchases by travelers of main nationalities indicates that the percentage exceeds 60% for “cakes & confections” by Taiwanese, Hongkongese, and Chinese and for “cosmetics, medicines, and toiletries” by Chinese.

Nationality	All		ROK		Taiwan		Hong Kong		China		USA	
	Percentage	Unit price in yen purchased	Percentage	Unit price in yen purchased	Percentage	Unit price in yen purchased	Percentage	Unit price in yen purchased	Percentage	Unit price in yen purchased	Percentage	Unit price in yen purchased
Cakes & confections	50.9%	8,067	55.3%	4,911	62.8%	7,874	60.1%	8,832	65.5%	11,933	27.9%	5,754
Other foods, alcoholic and non-alcoholic drinks, and tobaccos	45.8%	11,218	45.4%	8,238	42.1%	8,829	45.2%	10,716	49.9%	13,326	45.6%	13,394
Cameras, video cameras, and watches	9.7%	45,909	2.5%	17,090	5.4%	26,264	3.9%	34,440	29.8%	60,288	3.8%	31,194
Electric appliances	9.9%	33,286	3.7%	22,169	8.3%	23,953	5.4%	27,096	27.3%	43,623	5.0%	16,208
Cosmetics, medicines, and toiletries	34.8%	18,545	28.1%	12,383	56.8%	15,502	42.9%	11,689	65.3%	29,989	8.5%	7,084
Japanese clothes (kimono) and folkcraft objects	14.1%	13,793	4.2%	7,638	11.7%	10,431	11.9%	13,670	14.1%	13,765	24.1%	14,195
Clothes (non-Japanese), bags, and shoes	29.4%	32,544	19.0%	22,114	42.8%	34,536	52.8%	36,782	36.6%	45,921	16.2%	20,390
Cartoons, DVDs, and animation-related products	8.1%	10,019	4.8%	8,167	9.5%	10,373	10.7%	10,585	8.6%	9,559	7.4%	7,680

Expenses spent during travel by one foreigner visiting Japan for each particular purpose (limited to main nationalities)

Data about expenses spent during the travel by a traveler visiting Japan for a particular purpose indicates that a visitor coming for "sightseeing and leisure" spends 91,331 yen, a visitor coming for "business" spends 126,594 yen, and a visitor coming to visit relatives or acquaintances spends 104,465 yen, etc.

The size of the market segment corresponding to each purpose of visit can be estimated as follows: The expense amount spent during the travel for "sightseeing and leisure" is 284 billion yen, representing 40% of the total. The expense amount spent during the travel for "business", which is the sum of those for "exhibitions/fairs," "training," and "negotiations and other business activities," is 240.6 billion yen, representing 33.8% of the total.

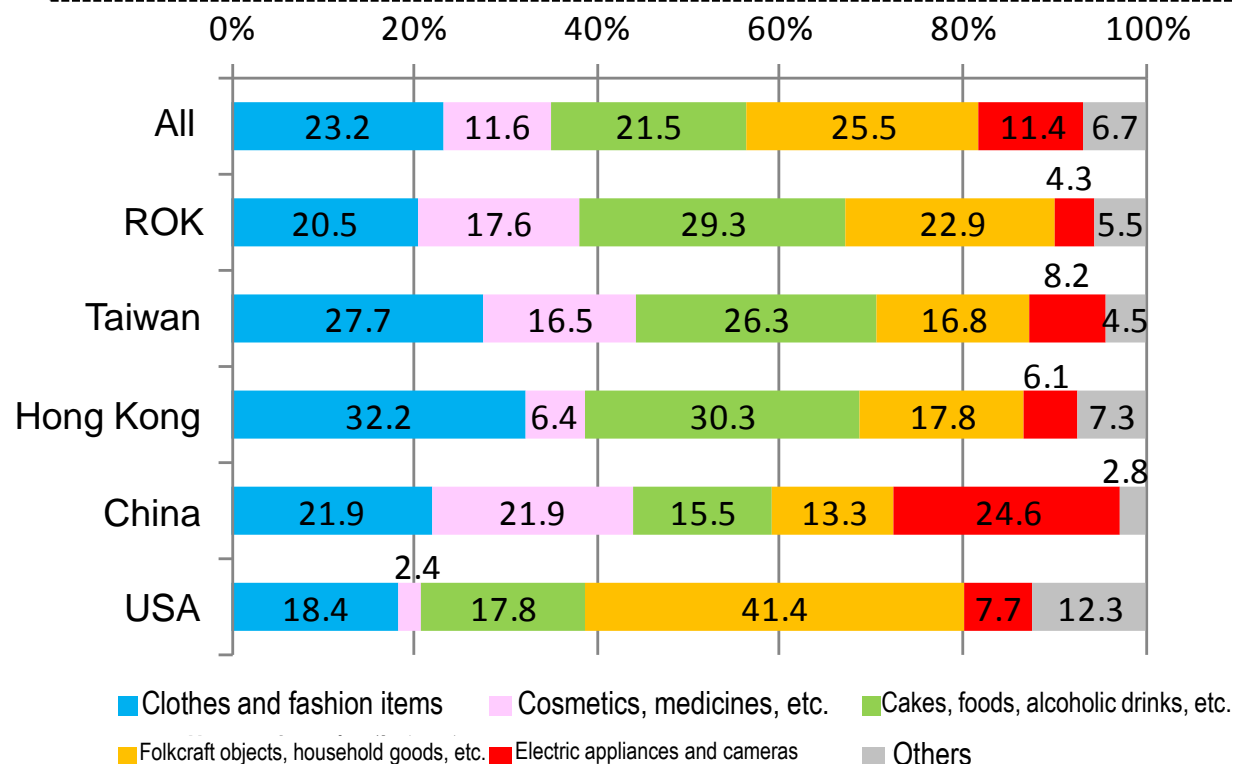
Purpose of visit		Sightseeing and leisure	Visiting relatives or acquaintances	Honey-moon	School-related travel	Event	Overseas education	Incentive tour	Business	Exhibitions /fairs	International conferences	Training	Negotiations and other business activities	Others
Expenses spent during travel (yen/person)	All	91,331	104,465	101,215	66,126	89,717	412,979	122,883	126,594	103,197	104,853	126,822	131,699	161,742
	ROK	49,406	69,106	73,905	37,790	38,974	307,872	32,960	72,952	66,790	70,640	51,601	78,124	74,360
	Taiwan	68,829	100,661	47,244	45,581	32,354	417,091	80,927	104,188	81,520	79,330	98,204	110,965	170,451
	Hong Kong	91,290	97,388	141,395	-	124,519	332,457	37,080	102,067	87,069	65,232	78,843	110,798	253,061
	China	117,258	141,157	130,744	120,121	107,352	567,359	77,643	188,311	149,068	188,537	189,162	190,712	221,857
	USA	125,445	102,761	175,912	113,440	65,029	348,665	60,000	135,875	166,490	92,523	142,007	140,001	155,351
[Reference] Consumption amount* (100 million yen)	All	2,839.8	621.1	32.2	45.0	35.9	630.3	17.4	2,405.6	122.4	192.5	361.4	1,729.2	498.0
	ROK	432.8	99.6	3.0	13.8	2.2	100.1	0.3	375.2	36.3	26.3	34.3	278.2	32.7
	Taiwan	488.0	51.4	5.9	1.3	2.1	51.5	1.7	176.0	11.9	12.3	17.1	134.7	49.0
	Hong Kong	280.3	10.3	2.2	0.1	2.4	4.3	0.4	39.0	2.5	2.2	2.8	31.5	7.6
	China	601.2	133.6	8.1	5.8	7.3	276.6	2.3	626.3	23.3	38.2	127.7	437.1	75.1
	USA	165.7	116.2	4.9	11.1	3.2	53.6	0.2	296.7	8.3	21.3	41.3	225.8	107.4
Percentage of consumption amount by purpose (The sum across a row is 100.)	All	39.9	8.7	0.5	0.6	0.5	8.8	0.2	33.8	1.7	2.7	5.1	24.3	7.0
	ROK	40.8	9.4	0.3	1.3	0.2	9.4	0.0	35.4	3.4	2.5	3.2	26.3	3.1
	Taiwan	59.0	6.2	0.7	0.2	0.3	6.2	0.2	21.3	1.4	1.5	2.1	16.3	5.9
	Hong Kong	80.9	3.0	0.6	0.0	0.7	1.2	0.1	11.3	0.7	0.6	0.8	9.1	2.2
	China	34.6	7.7	0.5	0.3	0.4	15.9	0.1	36.1	1.3	2.2	7.4	25.2	4.3
	USA	21.8	15.3	0.6	1.5	0.4	7.1	0.0	39.1	1.1	2.8	5.4	29.7	14.1
Number of foreign visitors for each purpose (10 thousand persons)	All	310.9	59.5	3.2	6.8	4.0	15.3	1.4	190.0	11.9	18.4	28.5	131.3	30.8
	ROK	87.6	14.4	0.4	3.6	0.6	3.3	0.1	51.4	5.4	3.7	6.7	35.6	4.4
	Taiwan	70.9	5.1	1.2	0.3	0.6	1.2	0.2	16.9	1.5	1.6	1.7	12.1	2.9
	Hong Kong	30.7	1.1	0.2	0.0	0.2	0.1	0.1	3.8	0.3	0.3	0.4	2.8	0.3
	China	51.3	9.5	0.6	0.5	0.7	4.9	0.3	33.3	1.6	2.0	6.8	22.9	3.4
	USA	13.2	11.3	0.3	1.0	0.5	1.5	0.0	21.8	0.5	2.3	2.9	16.1	6.9

* The consumption amount value above is obtained as the product of "expenses spent during travel" and "number of foreign visitors to Japan," so it does not include the domestic revenue contained in the package tour fees.

The most satisfying product purchased

Respondents were asked to answer the most satisfying of all products purchased during this visit to Japan. The answers were classified into six categories. The result is 23.2% for "clothes and fashion items," 11.6% for "cosmetics, medicines, etc.," 21.5% for "cakes, foods, alcoholic and non-alcoholic drinks, etc.," 25.5% for "folkcraft objects, household goods, etc.," 11.4% for "electric appliances and cameras," and 6.7% for "others."

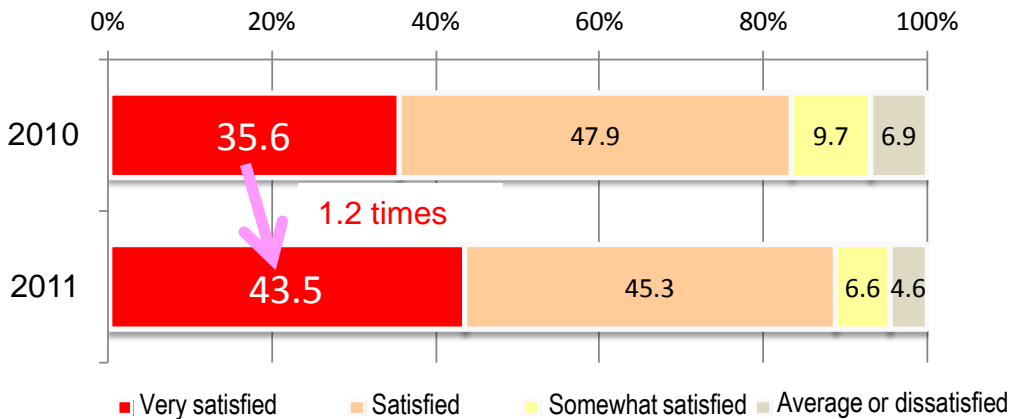
Data arranged for main nationalities indicates that South Koreans rate "cakes, foods, alcoholic and non-alcoholic drinks, etc." the highest at 29.3%, Taiwanese and Hongkongese rate "clothes and fashion items" the highest at 27.7% and 32.2%, respectively, Chinese rate "electric appliances and cameras" the highest at 24.6%, and Americans rate "folkcraft objects, household goods, etc." the highest at 41.4%.



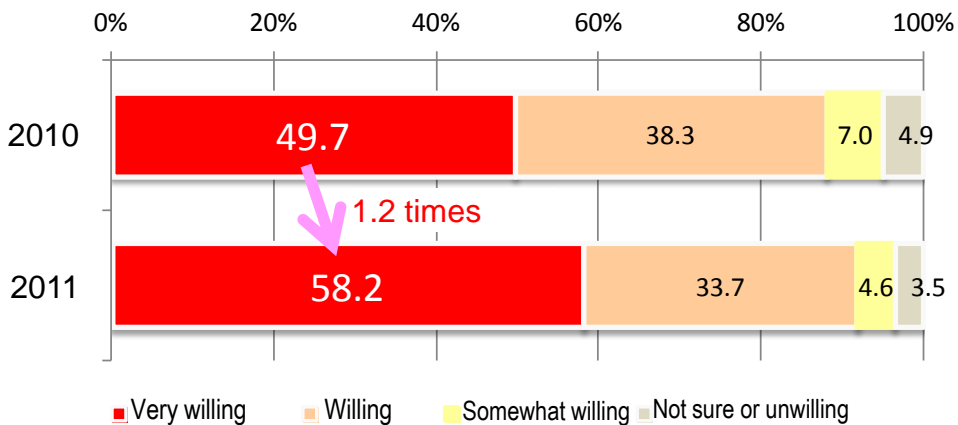
Large category	Small category
Clothes and fashion items	Clothes
	Fashion items
Cosmetics, medicines, etc.	Cosmetics
	Perfumes
	Medicines and health goods
Cakes, foods, alcoholic drinks, etc.	Cakes
	Other foods
	Alcoholic drinks and tobaccos
Folkcraft objects, household goods, etc.	Folkcraft objects and craftworks
	Household goods
	Books, picture cards, music CDs, artworks
	Cartoons and animation and character related products
	Sport-related goods
Electric appliances and cameras	Electric appliances
	Cameras
Others	Other goods
	Service
	Others

Satisfaction of travels to Japan and revisit willingness, compared with the previous year

■ The percentage of respondents who answered "Very satisfied" is 43.5%, 1.2 times the level in the previous year.
 ○ The percentage of "very satisfied" in 2011 is 1.2 times higher than the level in 2010 (35.6%).
 ○ Data arranged by nationality indicates that visitors from Thailand, Taiwan, Singapore, etc. are "very satisfied" at percentages that are particularly higher than those in the previous year.



■ The percentage of respondents who are very willing to revisit Japan is 58.2%, 1.2 times the level in the previous year.
 ○ The percentage of "very willing" in 2011 is 1.2 times higher than the level in 2010 (49.7%).
 ○ Data arranged by nationality indicates that visitors from France, Singapore, Thailand, etc. are "very willing" to revisit Japan at percentages that are particularly higher than those in the previous year.



5. Statistics on Inbound Tourists by Prefecture

(Statistics on Inbound Domestic and Foreign Tourists by Prefecture)

1. What are common standards for statistics on inbound tourists?

The common standards that apply all over the country specify survey and aggregation methods for surveys conducted to obtain **the number of inbound tourists, per-capita tourism consumption amounts, tourism consumption amounts, etc.**

2. Background of common standard establishment

Before the common standards were established, since individual prefectures used their own survey and aggregation methods when taking statistics on inbound tourists, **it was impossible to compare data among prefectures.**



The Tourism Agency established common standards in December 2009 so that **resulting statistics were easily compared among prefectures** and began in April 2010 to apply them to prefectures in sequence.

- The commencement of common standard application makes it possible to compare tourism statistics and trends among regions.
- Resulting statistics can be used as objective and reliable basis for developing strategies or policies concerning tourism promotion for individual regions.

Study processes for common standard establishment

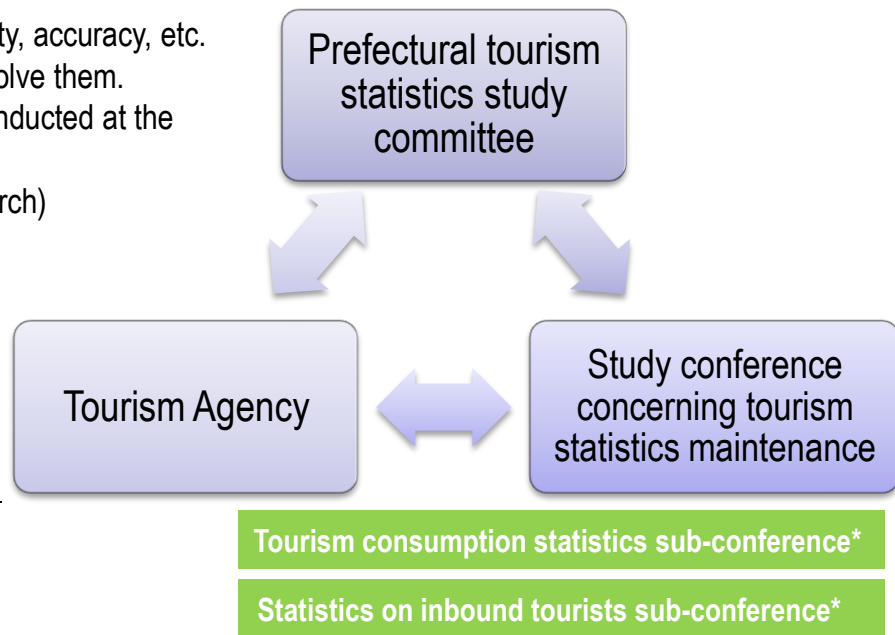
- May 2005 **Establishment of the study conference concerning tourism statistics maintenance**
- Aug. 2005 Suggestion concerning tourism statistics maintenance in Japan
- Dec. 2006 Enactment of the Tourism-based Country Promotion Basic Act
- Jun. 2007 Cabinet approval of the Tourism Nation Promotion Basic Plan
- Apr. 2008 **Study conference's interim report on tourism statistics maintenance (April 22, 2008)**
Compilation of guidelines for statistics on inbound tourists and tourism consumption and other statistics, including survey and estimation methods, etc. that ensure survey reliability with consideration on the reduction of burden imposed on prefectural governments as survey agents.

Fiscal 2008

- A test survey was conducted in Niigata and Okayama Prefectures to assess the validity, accuracy, etc. of the drafted guidelines and study to identify problems and the direction in which to solve them.
- A test on the method for determining the number of inbound tourists to streets was conducted at the Bikan Historical Quarter of Kurashiki City.
- Joint meeting for statistics on inbound tourists and tourism consumption statistics (March)

Fiscal 2009

- Test surveys were expanded to a total of 14 prefectures.
- **Holding of prefectural tourism statistics study committee (Apr., Aug., and Oct.)**
- Joint meeting for statistics on inbound tourists and tourism consumption statistics (Sep. and Dec.)
- **Prefectures were asked about opinions (Oct. and Dec.)** so that their opinions would be reflected on the guidelines.
- Study conference concerning tourism statistics maintenance (Dec.)

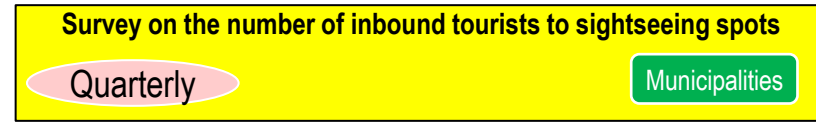


In December 2009, the Common Standards for Statistics on Inbound Tourists and Survey Procedure were established.

Survey process



○ Identify sightseeing spots, festivals, and events and check what spots and events are added, modified, or abolished as of January 1 every year.
 → Check whether each spot or event is included in the target of statistics.



○ Check the number of inbound tourists to sightseeing spots, etc. that are handled as the basis of statistics.
 → Ask those who manage sightseeing spots, etc. hold festivals/events, etc. to present monthly reports on the number of people who visited the sightseeing spots and festivals/events held in the prefecture.
 ⇒ **Total number of inbound tourists**



○ Check tourists visiting sightseeing spots in the prefecture for parameters, such as the percentage of tourists with each attribute, the average number of spots visited, and the average per-capita consumption.
 ⇒ **Actual number of inbound tourists**



○ Prepare the following data of each prefecture and release it:

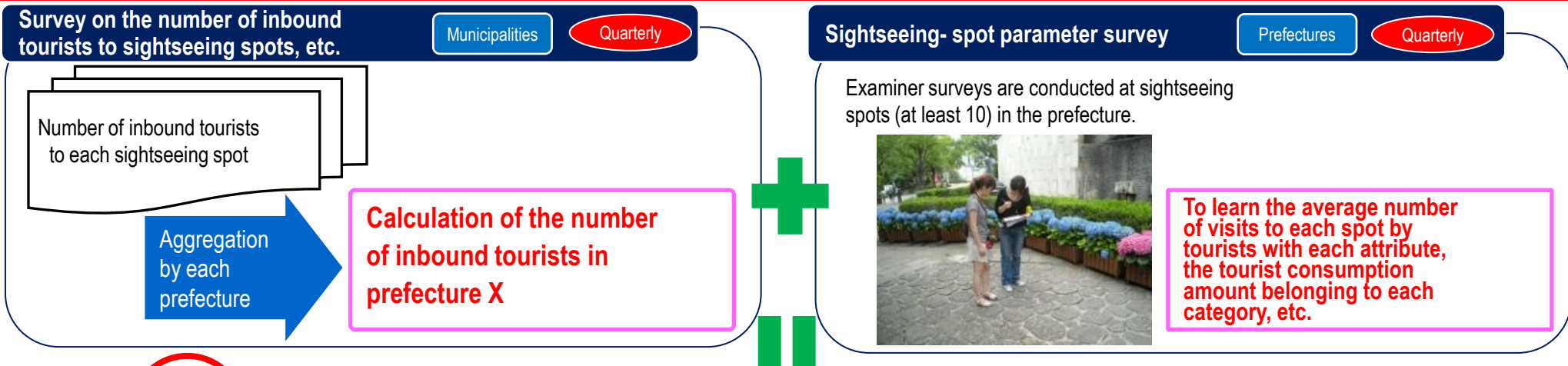
- Number of overnight inbound tourists by tourism purpose and residence [quarterly]
- Numbers of business-purpose and single-day sightseeing inbound tourists from outside the prefecture [yearly]
- Per-capita tourism consumption by foreign tourists categorized by purpose and by the distinction between overnight and single-day travels [quarterly]



○ Prefectures perform estimation and share results with municipal offices and the Tourism Agency using shared formats.
 ○ The Tourism Agency releases the results as national statistics on inbound tourists.

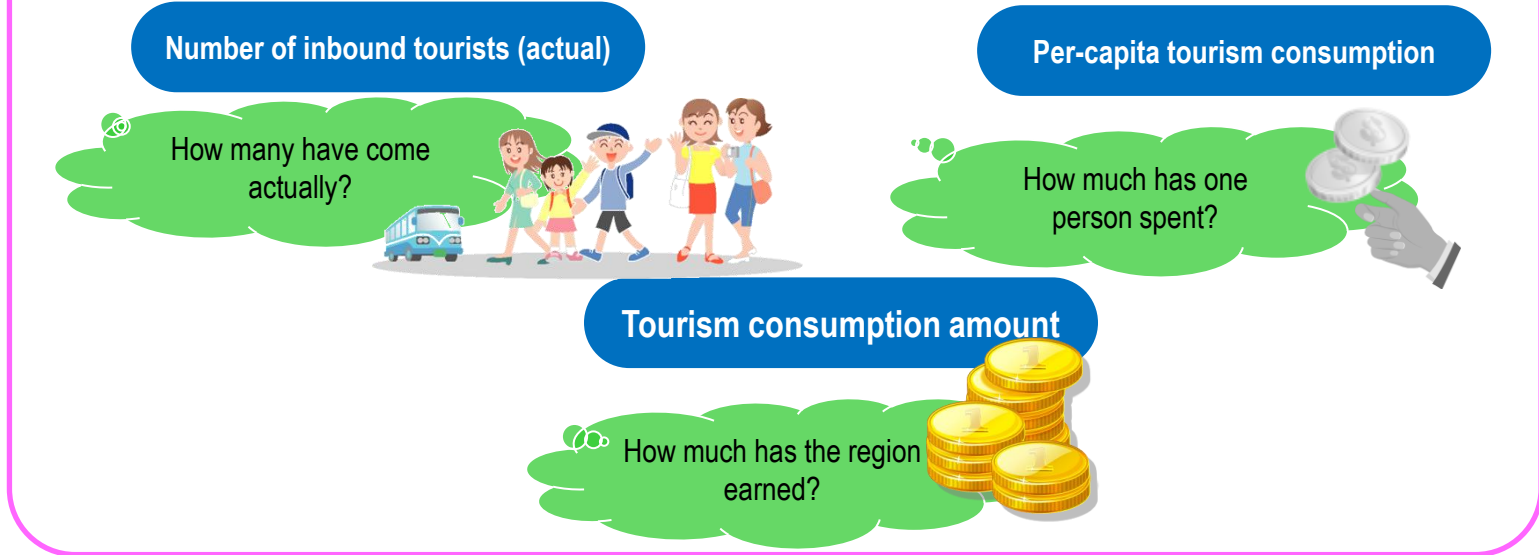
- Number of inbound tourists [Quarterly/yearly]
- Per-capita tourism consumption [Quarterly/yearly]
- Tourism consumption [Quarterly/yearly]

Image of statistics on inbound tourists based on common standards



Release Prefectural statistics on inbound tourists (Prefectures) National statistics on inbound tourists (Tourism Agency, Quarterly Thru year)

* Estimation based on statistics by residence (inside or outside the prefecture or foreigner), purpose of travel (sightseeing or business), and travel style (overnight or single-day)



* A sightseeing spot as defined in the common standards is

- A spot visited at least once a month by people the number of which is judged to be less than half the number of all tourists who visit the spot,
- A spot visited by inbound tourists which can be appropriately counted, and
- A spot visited in the previous year by at least 10 thousand inbound tourists or in a previous specific month by at least 5000 inbound tourists.

[Output example 1] Number of inbound tourists in prefecture A

- An overwhelmingly large percentage of single-day tourists are from within the prefecture.
- A relatively large percentage of foreign tourists visit the prefecture for business. This percentage is nearly 50%.

Number of inbound tourists

Number of inbound tourists (1,000 person-times)

Sightseeing		
	Overnight	Single-day
Within the prefecture	216	1,363
Out of the prefecture	1,158	44

Foreign visitors to Japan		
	Overnight	Single-day
Sightseeing, etc.	36	3
Business	17	-

Reference data: Travels for business*

	Overnight	Single-day
Within the prefecture	89	19
Out of the prefecture	218	0

* Single-day travels are for both sightseeing and business.

Note: Fiscal 2010

[Output example 2] Per-capita tourism consumption in prefecture A

- In the case of Japanese people, the per-capita consumption of sightseeing tourists is larger.
- In the case of foreign visitors to Japan, contrastingly, the per-capita tourism consumption of business tourists is larger.

Per-capita consumption amount

Per-capita consumption amount (yen/person-time)

Sightseeing		
	Overnight	Single-day
Within the prefecture	34,521	5,694
Out of the prefecture	99,900	1,777

Foreign visitors to Japan		
	Overnight	Single-day
Sightseeing, etc.	86,691	8,109
Business	137,845	8,109

Reference data: Travels for business*		
	Overnight	Single-day
Within the prefecture	34,219	4,831
Out of the prefecture	46,290	86,760

* Single-day travels are for both sightseeing and business.

Note: Fiscal 2010

[Output example 3] Tourism consumption in prefecture A

- According to the data of total tourism consumption amounts, sightseeing overnight tourists from outside the prefecture represent the largest volume zone.
- According to the data of per-capita tourism consumption amounts, foreign business overnight tourists are the most contributory, but the absolute number of tourists in this category is small.

Tourism consumption amount

Tourism consumption amount (million yen)

Sightseeing		
	Overnight	Single-day
Within the prefecture	7,460	7,763
Out of the prefecture	115,705	78



Foreign visitors to Japan		
	Overnight	Single-day
Sightseeing, etc.	3,115	23
Business	2,343	-

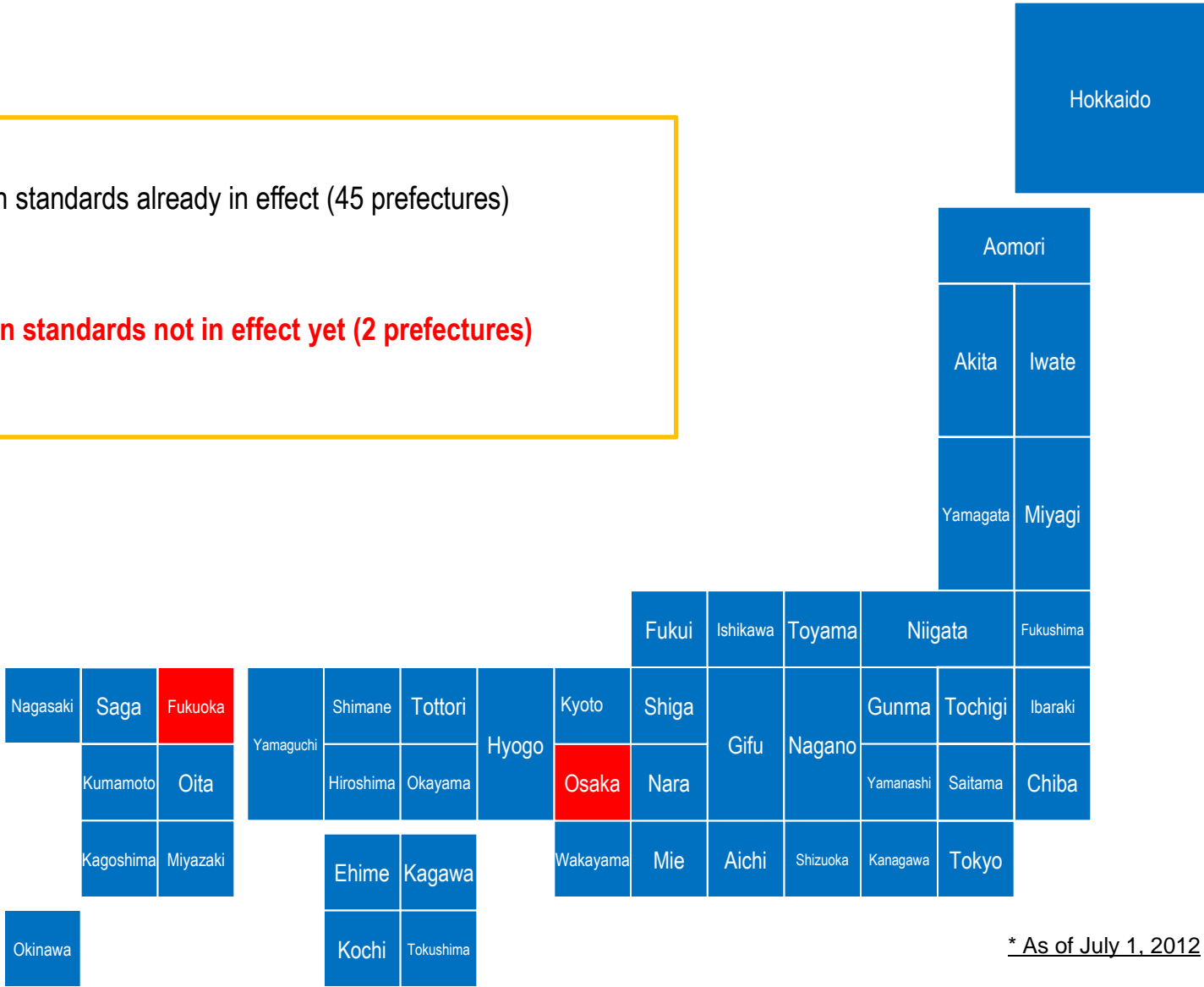
Reference data: Travels for business*		
	Overnight	Single-day
Within the prefecture	3,042	91
Out of the prefecture	10,081	7

* Single-day travels are for both sightseeing and business.

Note: Fiscal 2010

Status of the introduction of statistics on inbound tourists based on the common standards

	Common standards already in effect (45 prefectures)
	Common standards not in effect yet (2 prefectures)



* As of July 1, 2012

[Reference] Study of methods for accurately grasping the number of inbound tourists

- Methods for surveying and estimating the number of inbound tourists at sightseeing spots where it is difficult to grasp the number inbound tourists accurately were studied at the Bikan Historical Quarter of Kurashiki City, Okayama Prefecture as part of efforts to create the common standards for statistics on inbound tourists (fiscal 2008).
- Cost-saving methods for counting people accurately (analysis of images taken by video cameras) were studied at the Ueno Nakadoori (Uechun) shopping mall (fiscal 2009).
- System outcome accuracies influenced by video camera installation position, time zone, and other factors that vary depending on particular conditions were verified in Numazu City, Shizuoka Prefecture and Ebino City, Miyazaki Prefecture (fiscal 2010).



- Prefectures strongly request establishing methods for accurately grasping the number of inbound tourists not only at sightseeing spots, but also at festivals and other events.



- **Based on the results of the studies conducted in fiscal 2008 to 2010, methods for accurately grasping the number of inbound tourists at festivals and events were studied in fiscal 2011.**

[Example for reference 1] Understanding the "number of inbound tourists in the streets" of the Kurashiki Bikan Historical Quarter (2008)

Of inbound tourists in the Kurashiki Bikan Historical Quarter, the number of users of principal admission-paid facilities (such as museums of art, etc.) within the area can be obtained from the number of admission tickets issued, whereas it is difficult to obtain the correct number of sightseers who pass through the streets, but do not use any admission-paid facilities.

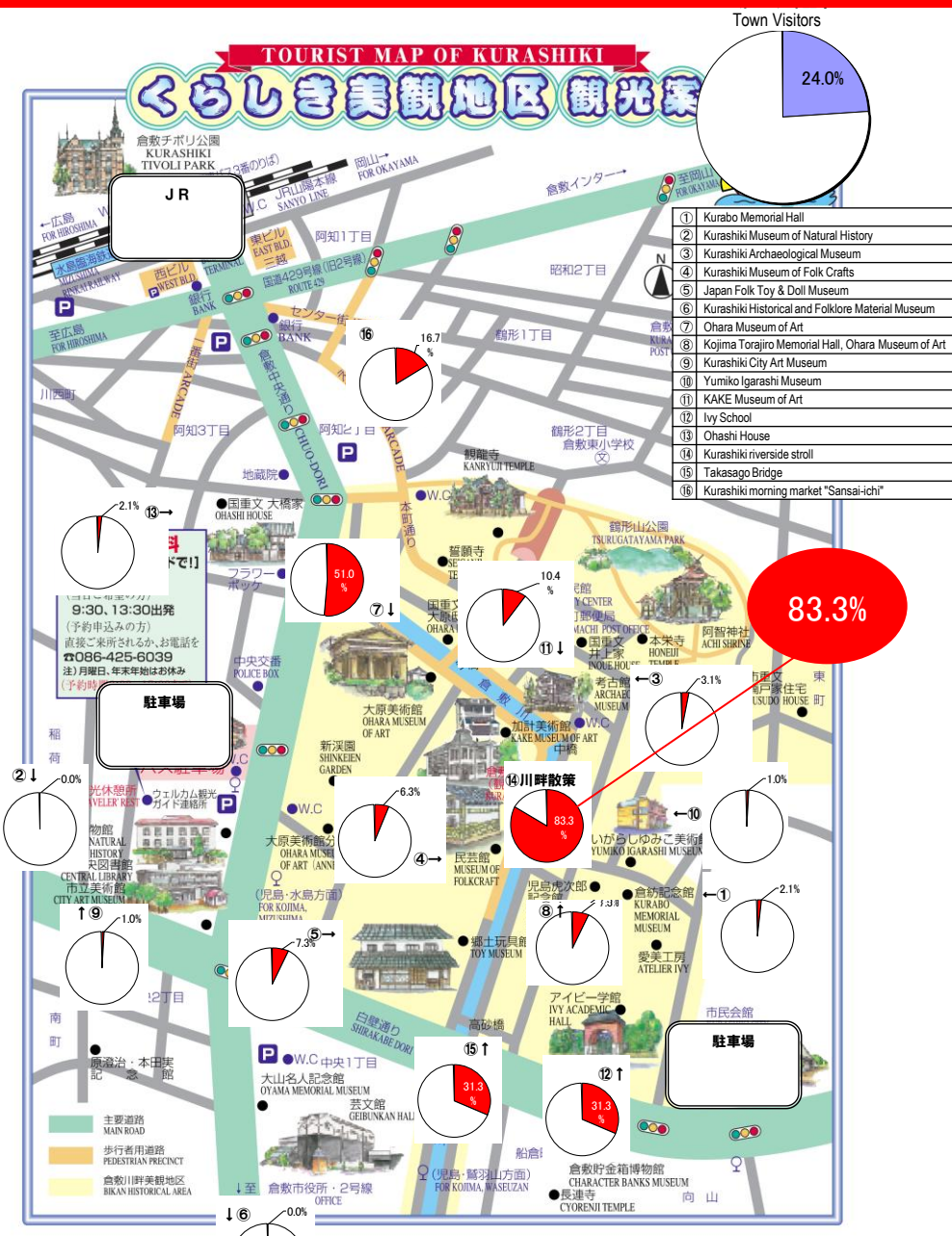
To address this issue, we tested and studied methods for estimating the number of inbound tourists in the Bikan area streets by relying on values that can be accurately grasped, such as the ridership of each major station and the number of users at admission-paid facilities.

<Content of survey>

- Traffic survey
At the entrances (three points) to the Kurashiki Bikan Historical Quarter, a traffic survey was conducted to obtain the number of pedestrians who passed each entrance in each direction during each predefined time zone.
- Interview survey
We interviewed pedestrians to hear about what was their attribute (tourist or local inhabitant), where they visited around the Kurashiki Bikan Historical Quarter, how long they stayed in the Kurashiki Bikan Historical Quarter, etc.

<Results of survey>

- According to the result of the traffic survey, the number of inbound visitors to the Bikan area was about 6,100 on a single day.
- The total number of inbound visitors to the area in 2007 was about 3,200,000 per year, which is 525 times the number of people who visited the area on February 15.
- The result of interviews about visited places indicates that about 24% of the respondents did not visit any admission-paid facilities, but only strolled in the streets.
- It is possible to obtain the correct number of inbound visitors by calculating the product of the correct number of people who strolled at the riverside of the Kurashiki River and the reciprocal of the above percentage.



If inbound tourists are to be always counted, the general method might be to use examiners. However, it is practically difficult to always assign examiners to the task of counting. Therefore, there is demand for developing a less expensive method.

To meet this demand, a demonstration experiment was conducted in fiscal 2009 as follows: Images taken at the Ueno Nakadoori shopping mall (Taito-ku, Tokyo) by a home video camera were analyzed using leading-edge imaging software to grasp the number of pedestrians.

<Survey content>

Pedestrians were photographed by a home video camera installed on the second floor of a commercial building that faces the Ueno Nakadoori shopping mall. The taken images were later analyzed using leading-edge imaging software that was being developed by a Japanese leading optics manufacturer (including an algorithm that recognizes a person from the shape of the upper half of his/her body). Errors between the software and manual counts were calculated.



Photographing of moving pedestrians

<Survey results>

- The recognition ratio of the imaging software exceeded 95% regardless of whether the time was during the day or evening. It is sufficiently accurate considering the general assessment that counts by examiners deviate from real values by about 5 to 10% due to fatigue and other factors.
- The accuracy was sufficient both in the direction to move away from the camera (counting persons on their back) and in the direction to move towards the camera (counting persons on their front).
- Since over 4,000 pedestrians were counted per hour, the quantitative performance was also satisfactory.

Time zone	Direction Time	Direction 1 (towards station A)			Direction 2 (towards station B)			Sum across two directions		
		Manual	Imaging	Error	Manual	Imaging	Error	Manual	Imaging	Error
Day	13:00 ~ 13:29	574	545	94.9%	537	505	94.0%	1,111	1,050	94.5%
	13:30 ~ 13:59	614	574	93.5%	629	588	93.5%	1,243	1,162	93.5%
	14:00 ~ 14:29	644	609	94.6%	587	570	97.1%	1,231	1,179	95.8%
	14:30 ~ 14:59	651	615	94.5%	637	649	101.9%	1,288	1,264	98.1%
	Total	2,483	2,343	94.4%	2,390	2,312	96.7%	4,873	4,655	95.5%
Evening	16:00 ~ 16:29	617	587	95.1%	643	631	98.1%	1,260	1,218	96.7%
	16:30 ~ 16:59	705	674	95.6%	592	604	102.0%	1,297	1,278	98.5%
	17:00 ~ 17:29	563	529	94.0%	598	569	95.2%	1,161	1,098	94.6%
	17:30 ~ 17:44	281	251	89.3%	308	309	100.3%	589	560	95.1%
	Total	2,166	2,041	94.2%	2,141	2,113	98.7%	4,307	4,154	96.4%
Total across all time zones	Total	7,132	6,727	94.3%	6,921	6,737	97.3%	14,053	13,464	95.8%

[Reference example 3] Grasping of the number of inbound tourists at Takaosan Shrine Festival in Numazu City (fiscal 2010)

Verification was conducted to determine whether the traffic volume assessment system which is based on processing of video camera images and proved to be sufficiently accurate in fiscal 2009 could be used as a method for grasping the number of inbound tourists at festivals or events held under different conditions.

For this purpose, how the accuracy of the system varied depending on the video camera installation position, time zone, and other factors that were different with the situation was verified.

<Survey content>

Video cameras were installed at 8 locations of the festival site to survey the number of inbound tourists.

The imaging system used consisted of a small device capable of extracting persons from image data and a dedicated PC on which software for aggregating and displaying results was installed.

During this experiment, video images were played back at an ordinary speed and were processed on a real-time basis as they played.

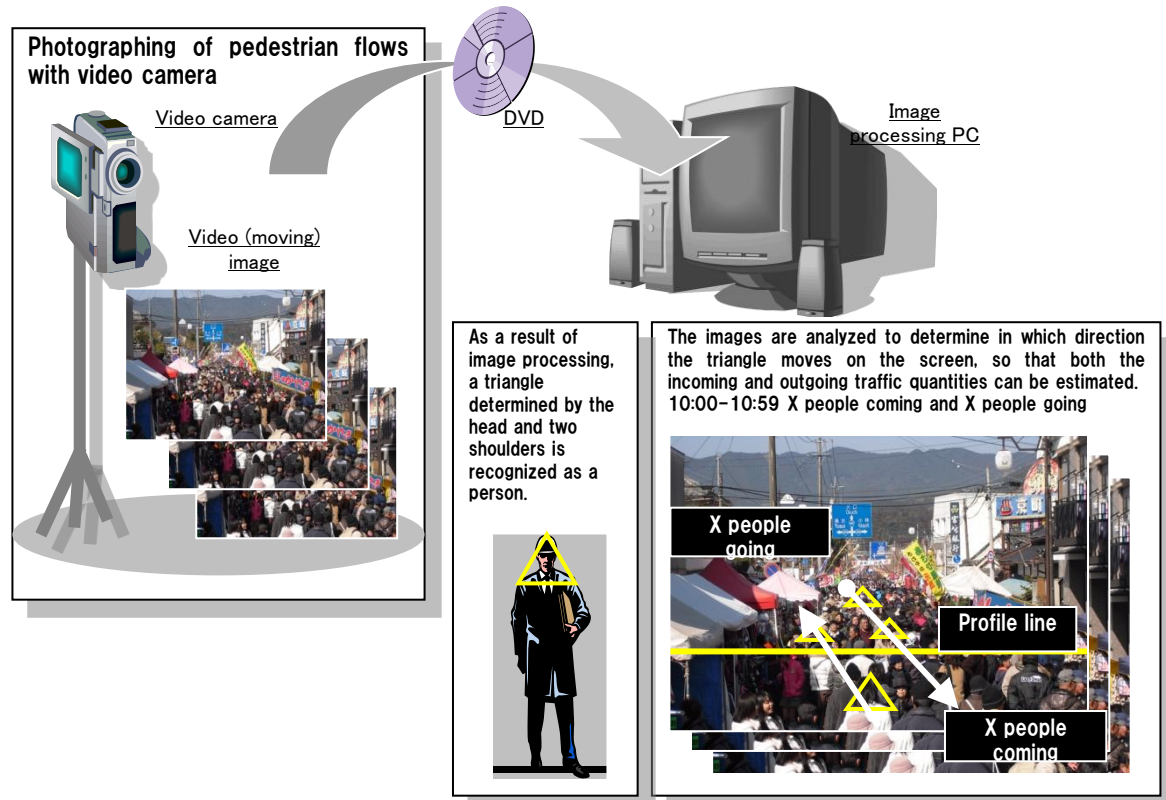
<Survey results>

Problems with the traffic assessment system used during this experiment

- ① The accuracy drops considerably at night when the light intensity is low.
- ② The background of the person who is the video image target influences the accuracy.
- ③ The size of the upper body of the person influences the accuracy.



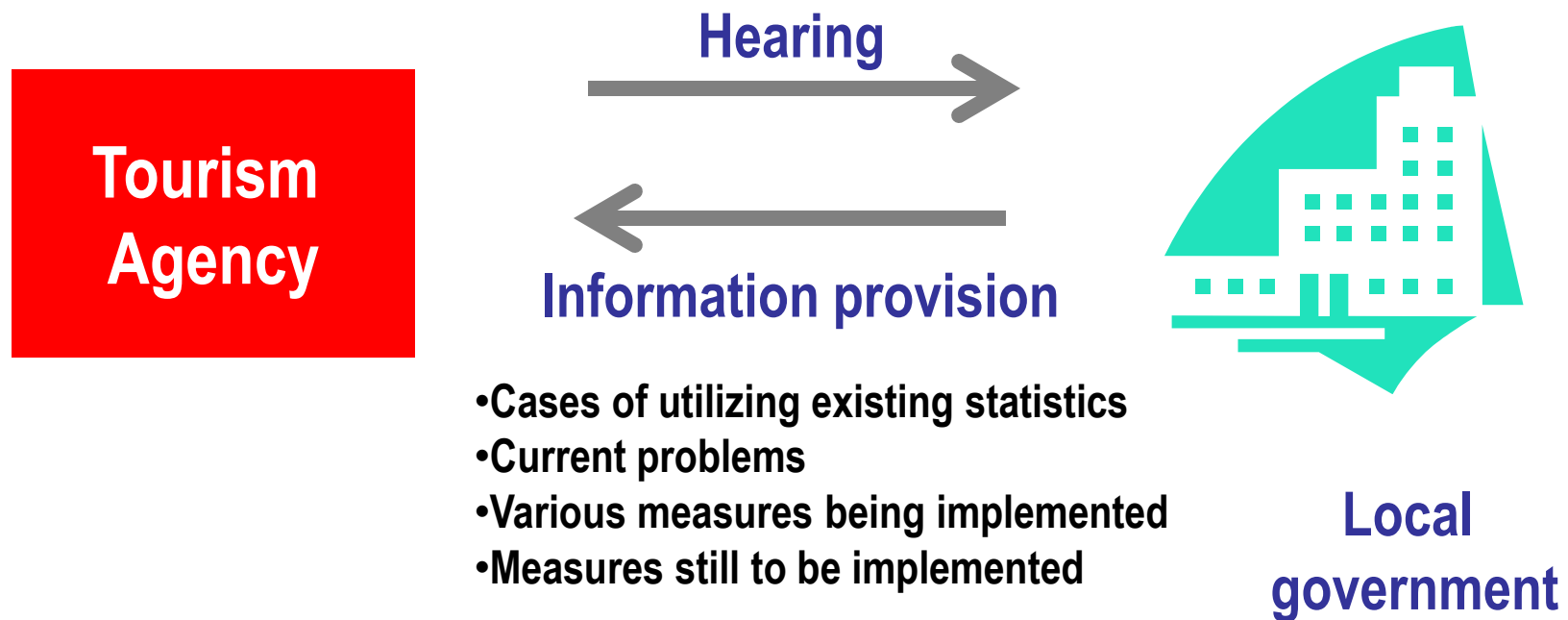
Some problems can be alleviated by manipulating video images prior to the starting of image processing. It is therefore desirable to list up what is to be noted when installing video cameras on the site and to study subsequent manipulation.



6. Local Governments' Efforts to Use Statistics on Inbound Tourists

Leading efforts for utilizing survey results in cooperation with local governments

- **Select** local governments that are highly aware of tourism statistics, **as pilot local governments**
- Ask the pilot local governments about **problems** annoying them, the **status of their efforts for tourism policies, etc.**



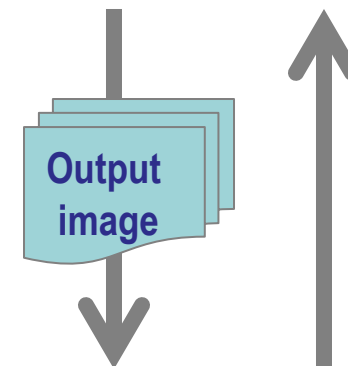
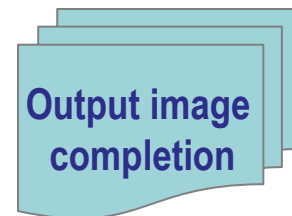
- Based on the results of the hearing, **create output images representing statistical results.**



- What **relationship** exists between **problem awareness and measures**?
- What information is required to **use statistics for measures**?
- What information is required to **answer problem awareness**?

- **Arrangement of existing statistics** that can be used although not based on the common standard
- **Collection and arrangement of statistics held by local governments as their own resources**

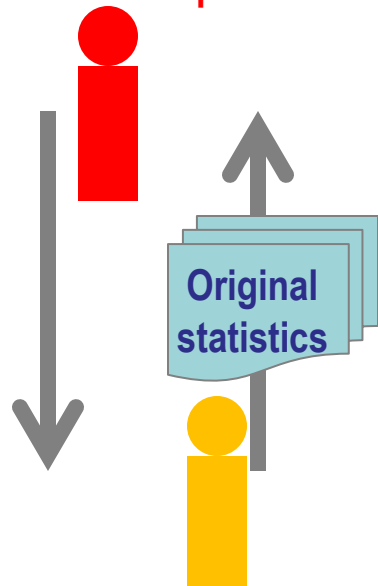
Request for output image assessment



Output image assessment feedback



Statistics inquiries



Statistics provision

Tourism Agency

Local governments

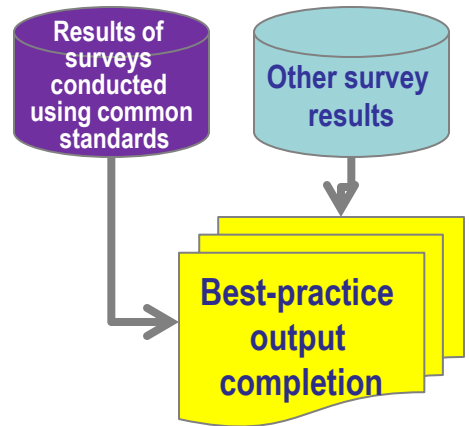
Creating and sharing best-practice outputs

- Create best-practice outputs **using common standard data, feed them back to local governments, and request their utilization.**



Tourism Agency

Local governments



Best practice release

Common standard explanation conference



Good use cases:

Results of country-wide statistics on
inbound tourists surveys conducted
using common standards

- Nationwide statistics on inbound tourists based on common standards is characterized by the real total and actual numbers of inbound tourists, rather than counts that are defined differently among local governments, so that **the "quality" of the real number of tourists can be compared among regions/areas.**
- Another characteristic is as follows: Since **the real number of inbound tourists** can be identified, it is also possible to grasp **tourism consumption** in individual prefectures accurately.
- This material shows typical use cases of this statistics from the following viewpoint:

No.	Use case	Prefecture used as an example
1	Influence of the total and actual numbers of inbound tourists on tourism consumption amounts	Not open (2 prefectures in one district)
2	Grasping of the number of inbound tourists and economic effect	Not open (2 adjacent prefectures)
3	Identification of segments of tourists who spend money in local regions/areas	Not open
4	Identification of types of tourists on which the prefecture is more advantageous than other prefectures	Hyogo, Wakayama, and Nara
5	Grasping of the relative size of the prefecture's tourism industry	Nagano
6	Creation of indicators for prefectural tourism economy	Multiple prefectures

[Reference] Basic information on individual prefectures

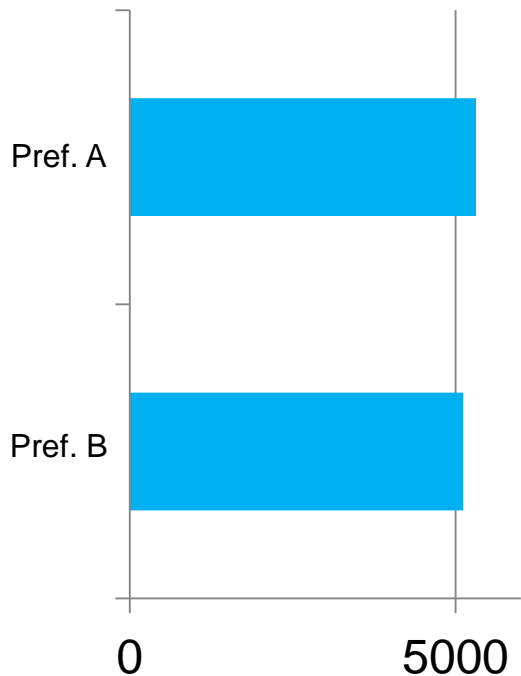
Prefecture	Total number of inbound tourists (1,000 person-times) * limited to sightseeing spots	Actual number of inbound tourists (1,000 person-times)	Tourist consumption amount (million yen)	Population (1,000 persons)	Area (km ²)	Private final consumption expenditure (100 million yen)
Nagano	15,308	8,977	108,956	2,159	13,562	42,638
Hyogo	25,584	15,094	100,687	5,583	8,396	112,506
Wakayama	3,8573	2,701	33,911	1,004	4,726	18,570
Nara	10,572	5,007	39,607	1,399	13,691	26,622
Pref. A	5,313	2,870	35,857	999	1,877	19,786
Pref. B	5,116	1,713	18,708	766	7,105	13,934
Pref. C	15,308	8,977	108,956	2,159	13,562	42,638
Pref. D	16,564	9,696	74,227	2,092	10,621	38,282
Pref. E	10,547	4,446	65,380	1,179	9,323	21,417

Source: Prefectural statistics on inbound tourists in April to June, "Social Life Statistics Indicators - Prefectural Indicators - 2011" released by the Statistics Bureau, Ministry of Internal Affairs and Communications, and the web pages of individual prefectures

Use case 1 "It is possible to understand that tourism consumption amount is proportional to the actual number of inbound tourists."

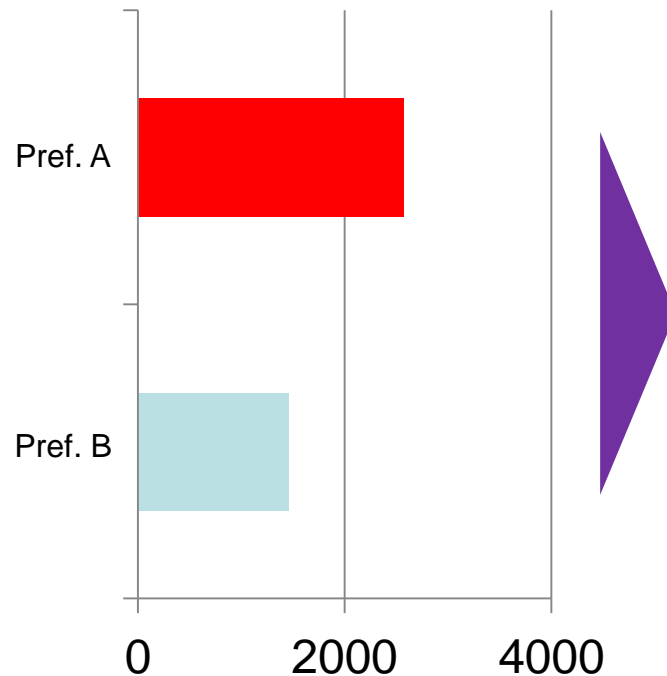
- **The total numbers of inbound tourists** in prefectures A and B belonging to the same district **are nearly equal**.
- However, **the actual number** in prefecture A is **about 1.77** times the level in prefecture B.
- **The tourism consumption** in prefecture A is **about 1.82 times** the level in prefecture B. This suggests that the tourism consumption is **proportional to the actual number**, not the total number.

Total number of inbound tourists



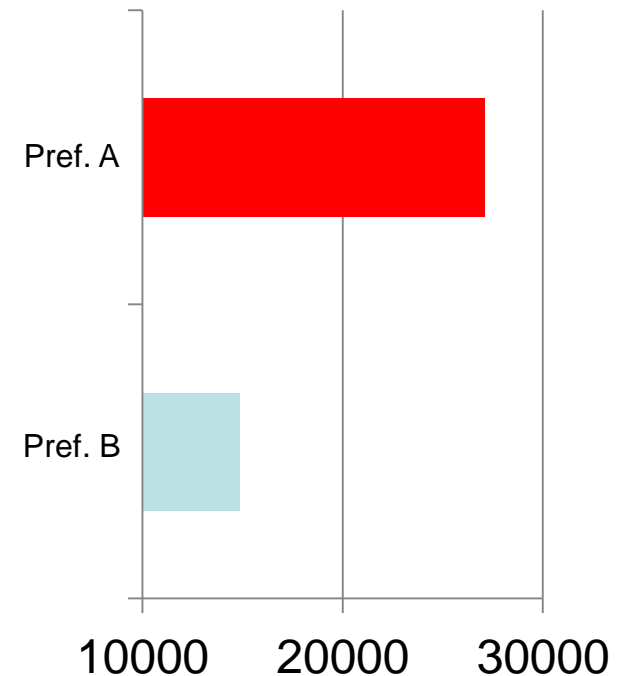
(1000 person-times)

Actual number of inbound tourists



(1000 person-times)

Tourism consumption amount

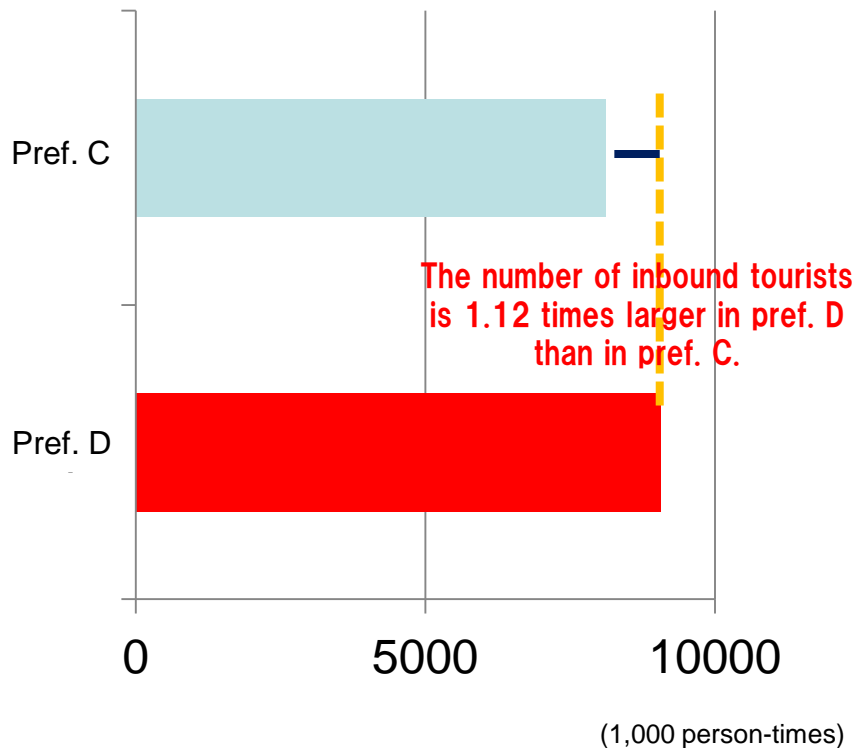


(million yen)

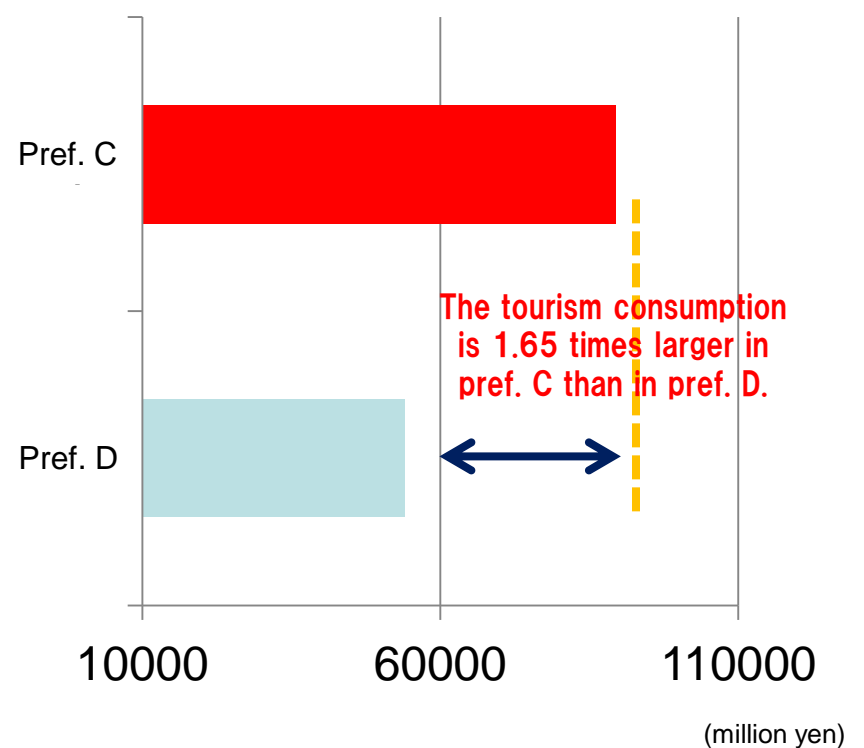
* The values are only for Japanese tourists. The total number of inbound tourists includes the number of people not only at sightseeing spots, but also at festivals and other events.

- The number of inbound tourists in prefecture D is **about 1.12 times** larger than the level in prefecture C, which is adjacent to prefecture D.
- On the other hand, the tourism consumption amount in prefecture C is no less than **about 1.65 times** larger than the level in prefecture D.

Number of inbound tourists



Tourism consumption amount

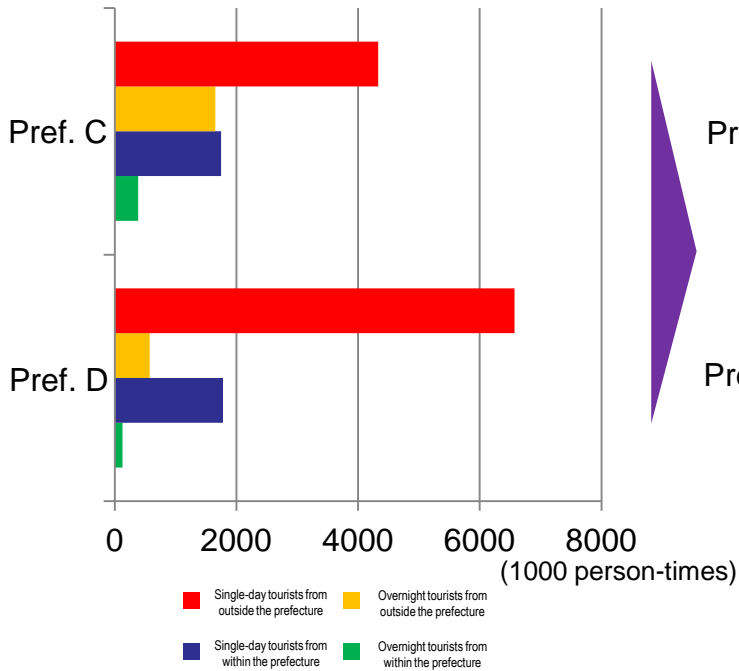


* The values are only for Japanese tourists.

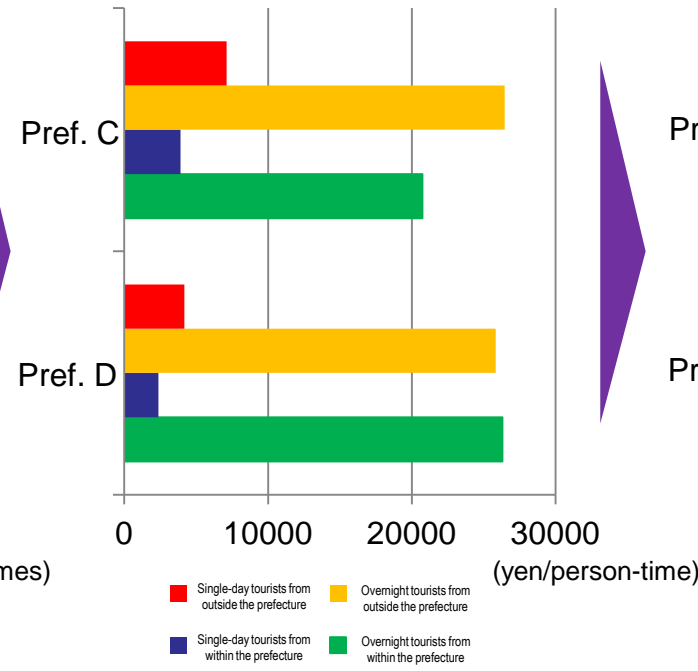
Use case 2 "It is possible to understand the direction in which to develop measures for increasing tourism consumption amounts" ②

- A large percentage of inbound tourists in prefecture D are single-day tourists from outside the prefecture.
- The per-capita consumption by overnight tourists from within the prefecture is higher in prefecture D, whereas the per-capita consumption by single-day tourists is higher in prefecture C.
- As a result, in prefecture C, the per-capita consumption is higher, and the consumption by the relatively many overnight tourists from outside the prefecture and single-day tourists from outside the prefecture drives up the total consumption amount. The overall effect is an increase in tourism consumption amount.
- For **prefecture C**, therefore, an **increase in the number of inbound tourists** will lead to an increase in consumption amount and, for **prefecture D**, **an increase in the number of overnight tourists with high per-capita consumption and in the per-capita consumption by single-day tourists belonging to the volume zone** will lead to an increase in consumption amount.

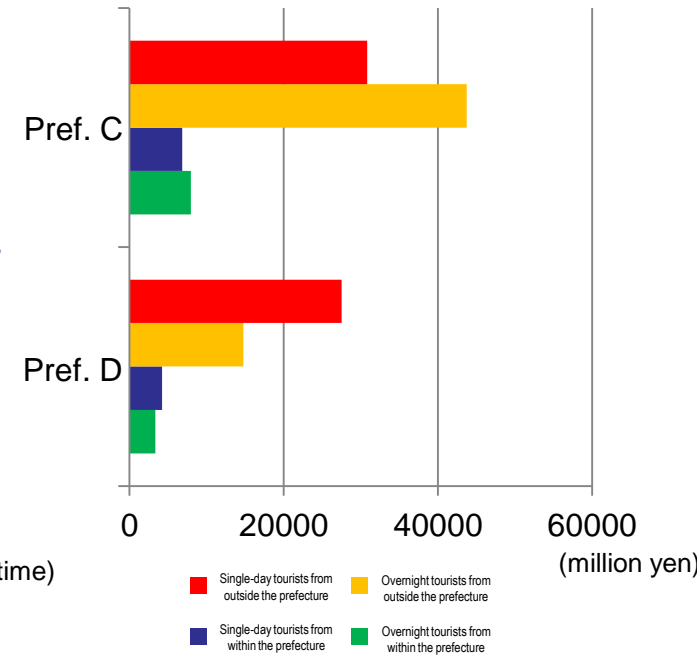
Number of inbound tourists



Per-capita tourism consumption



Tourism consumption amount



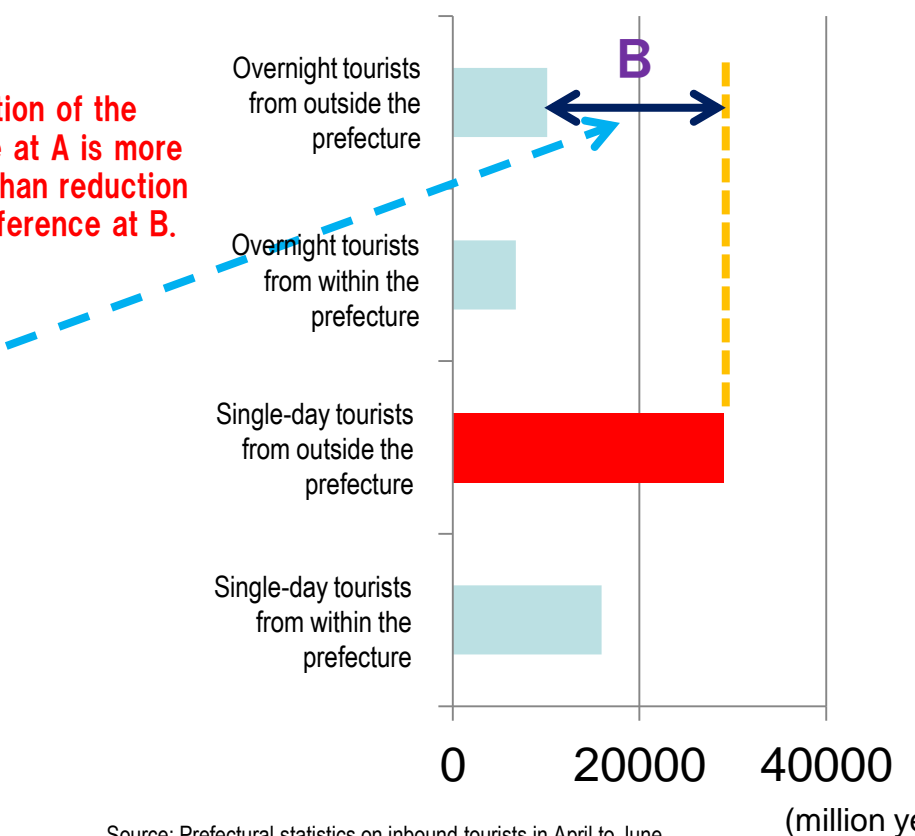
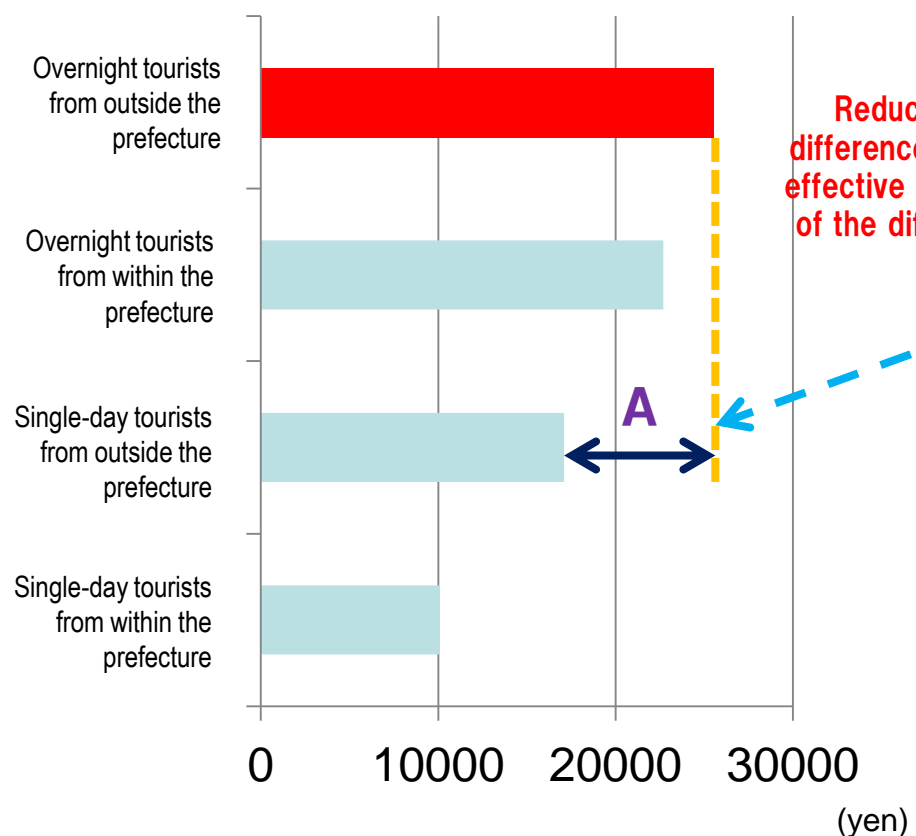
* The values are only for Japanese tourists.

Use case 3 "It is possible to identify segments of tourists who spend money in the local area."

- Tourists of the highest per-capita consumption in prefecture E are overnight tourists from outside the prefecture.
- However, the total consumption by single-day tourists from outside the prefecture is about 2.7 times larger than that by overnight tourists from outside the prefecture.
- Considering that the per-capita consumption by single-day tourists from outside the prefecture is no more than about 67% of that by overnight tourists from outside the prefecture, measures for increasing the per-capita consumption by single-day tourists from outside the prefecture, rather than increasing the number of overnight tourists from outside the prefecture, will have immediate effectiveness.

Per-capita consumption by tourists in prefecture E

Tourism consumption amount in prefecture E



Source: Prefectural statistics on inbound tourists in April to June

Use case 4 "Per-capita consumption data makes it possible to identify types of tourists for which the prefecture has competitive advantage over other prefectures." ①

Per-capita consumption by tourists in three Kinki prefectures

Source: Prefectural statistics on inbound tourists in April to June

	Overnight (yen)		Overnight (yen)		A/B	C/D	A/C	B/D
	From outside pref. (A)	From within pref. (B)	From outside pref. (C)	From within pref. (D)				
Hyogo Prefecture	22,843	22,144	4,615	3,055	1.032	1.512	4.950	7.248
Nara Prefecture	27,791	17,032	4,940	2,829	1.632	1.746	5.626	6.021
Wakayama Prefecture	28,442	18,344	9,375	4,032	1.550	2.325	3.034	4.550

A/B = the ratio of the consumption by overnight tourists from outside the prefecture to the consumption by overnight tourists from within the prefecture

If this ratio is higher, **overnight tourists should be invited from outside the prefecture** to produce a higher economic effect per tourist.

C/D = the ratio of the consumption by single-day tourists from outside the prefecture to the consumption by single-day tourists from within the prefecture.

If this ratio is higher, **single-day tourists should be invited from outside the prefecture** to produce a higher economic effect per tourist.

A/C = the ratio of the consumption by overnight tourists from outside the prefecture to the consumption by single-day tourists from outside the prefecture.

If this ratio is higher, **tourists from outside the prefecture should be invited as overnight tourists** to produce a higher economic effect per tourist.

B/D = the ratio of the consumption by overnight tourists from within the prefecture to the consumption by single-day tourists from within the prefecture

If this ratio is higher, **tourists from within the prefecture should be invited as overnight tourists** to produce a higher economic effect per tourist.

* The values are only for Japanese tourists.

Use case 4 "Per-capita consumption data makes it possible to identify types of tourists for which the prefecture has competitive advantage over other prefectures."②

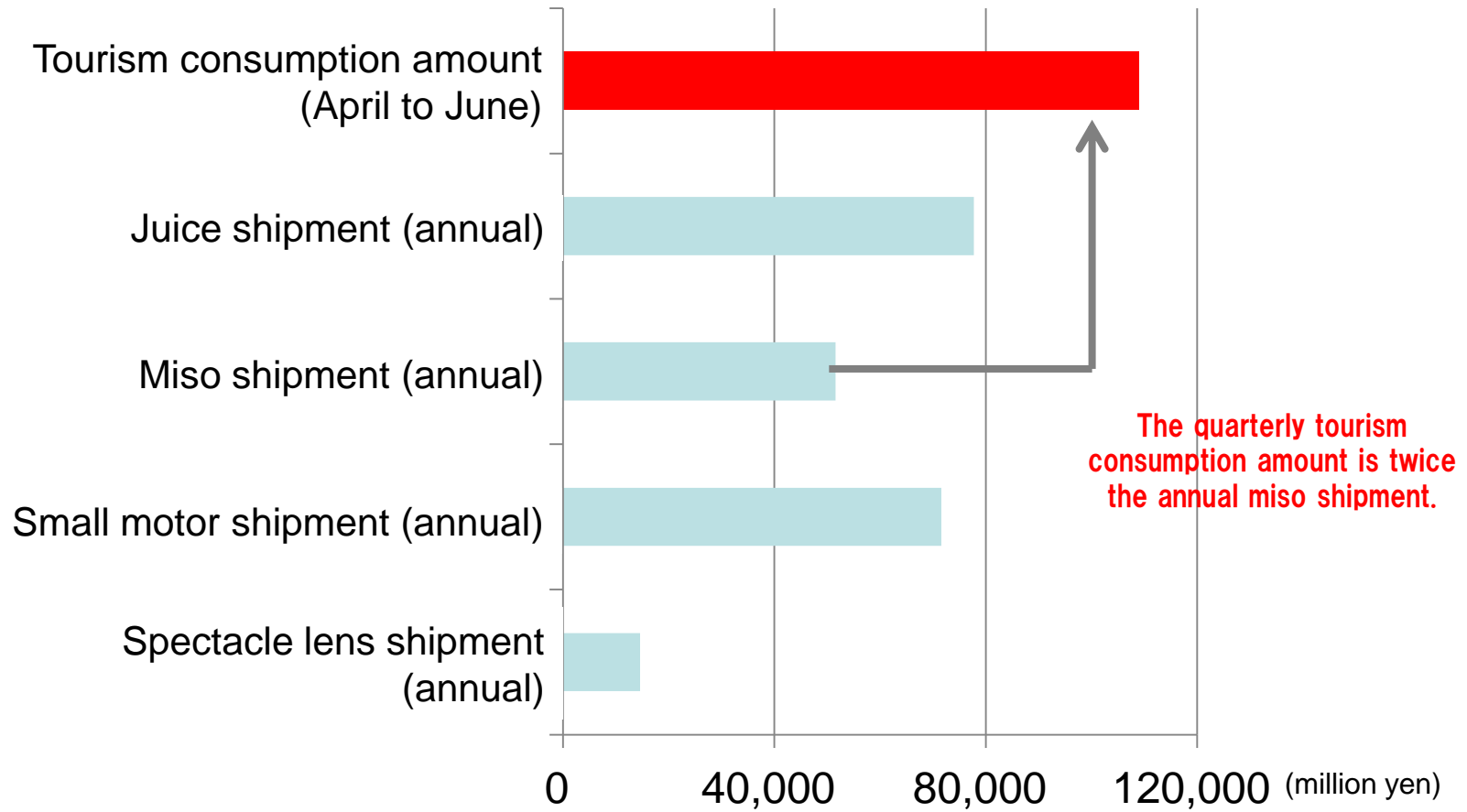
- The consumption behavior of tourists varies among local areas even though they are in the same Kinki region.
- Before a prefecture can take measures that have competitive advantage over adjacent prefectures, it should expand the segments of tourists over which the prefecture is competitively advantageous than other prefectures in terms of the per-capita consumption and volume zone.

Prefecture	Tendency	Direction to expand the segment (example)
Hyogo	The per-capita consumption by overnight tourists from within the prefecture is relatively large.	<ul style="list-style-type: none">•Promotion of stay-type urban leisure•Development of cheap, near, and short travels
Nara	The per-capita consumption by overnight tourists from outside the prefecture is relatively large.	<ul style="list-style-type: none">•Maintenance/improvement of accommodation facilities•Development of stay-type travels for tourists from outside the prefecture
Wakayama	The per-capita consumption by single-day tourists from outside the prefecture is relatively large.	<ul style="list-style-type: none">•Improvement of access from outside the prefecture•Development/maintenance of easily-enjoyable one-stop sightseeing spots

Use case 5 "It is possible to understand the relative approximate size of the tourism industry."

- The tourism consumption in Nagano Prefecture, even though it is limited to the first quarter, exceeds the annual shipment from representative industries of the prefecture.

Comparison in size between the tourism consumption amount in Nagano Prefecture and the shipment from the prefecture's industries that rank first in Japan



* This table only shows the approximate size for reference because it compares demand and supply values.

Use case 6 “A variety of indicators of prefectural tourism economy can be identified.”

- The following table shows various indicators obtained based on statistics of inbound tourists:

Prefecture	Number of tourists per resident	Tourism consumption amount per resident (10 thousand yen)	Ratio of tourism expenditure to private final consumption expenditure (%)	Tourist density (number of tourists per km ²)
Nagano	4.2	5.0	2.6	662
Hyogo	2.7	1.8	0.9	1798
Wakayama	2.7	3.4	1.8	572
Nara	3.6	2.8	1.5	1357
Prefecture A	2.9	3.6	1.8	1529
Prefecture B	2.2	2.4	1.3	241
Prefecture C	4.2	5.0	2.6	662
Prefecture D	4.6	3.5	1.9	913
Prefecture E	3.8	5.5	3.1	477

7. Examples of studies that make use of tourism statistics

【Example Study: 1】 Estimation of the number of nights spent by foreign visitors to Japan considering the effect of inter-regional cooperation

- Associate Professor Tetsuo Shimizu at the University of Tokyo developed **a model that estimates the number of nights spent by foreign visitors to Japan by nationality using the statistics on overnight travels** and analyzed the influence of the effect of inter-regional cooperation on the changes in the number of nights spent by tourists.

[Estimated number of nights spent by foreign visitors in each prefecture by nationality]

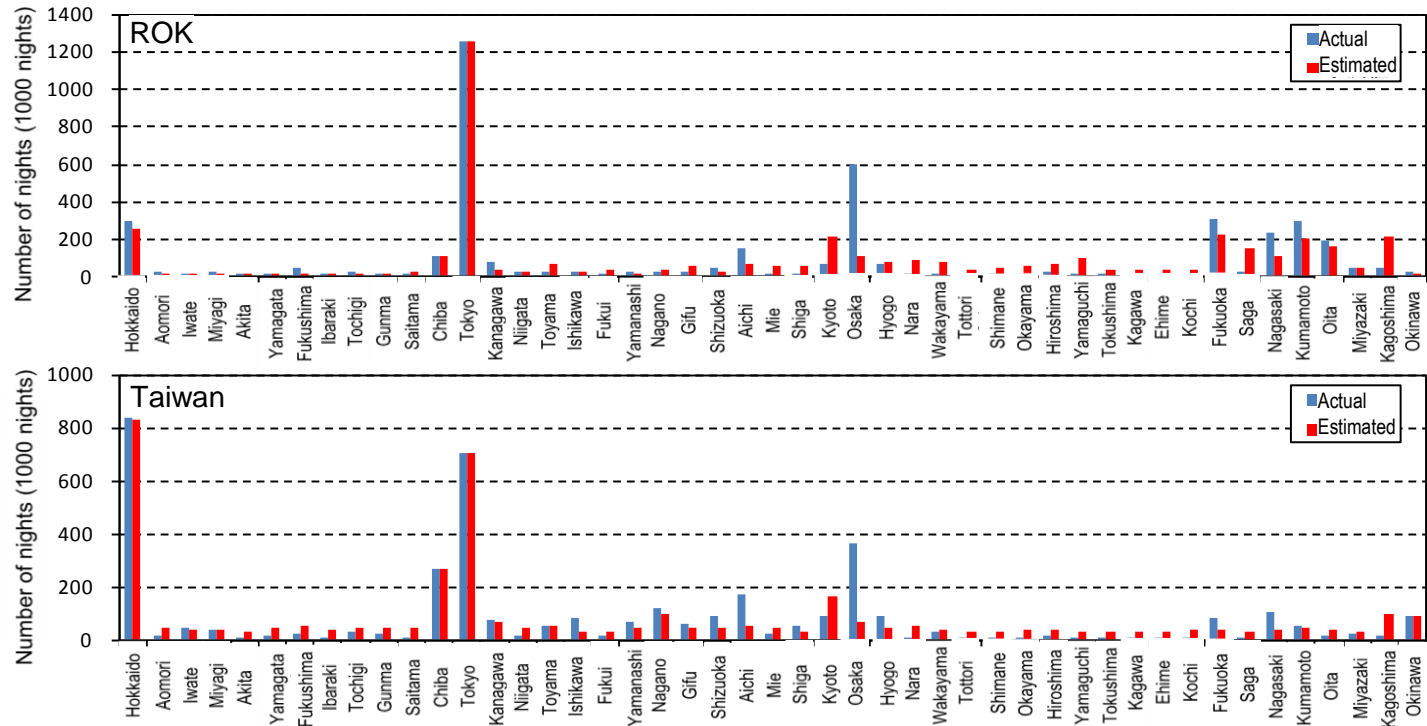
Explained variable

• Number of guests by nationality

Explanatory variables

- GDP data
- Average generalized cost
- Cooperation attractiveness
- Distance index

Maximum likelihood estimation used

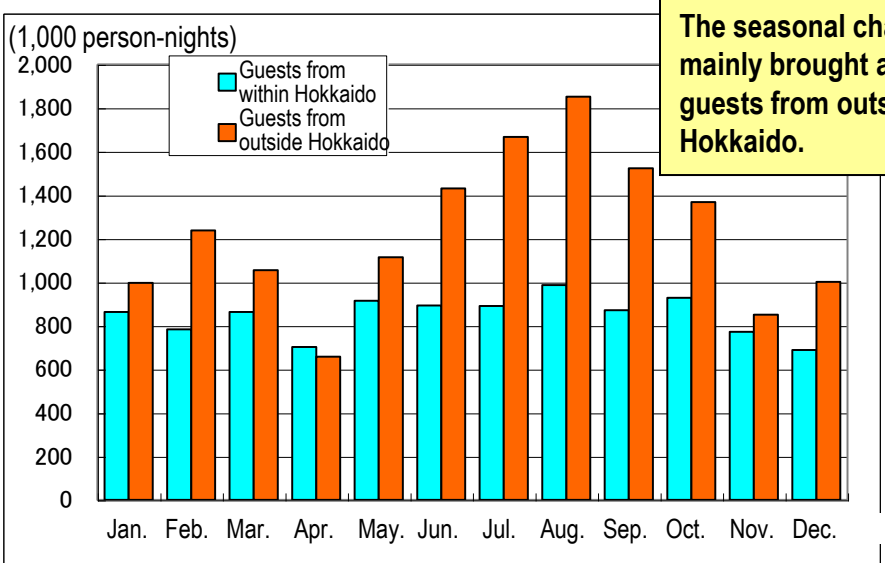


Source: "Construction of a model for estimating the number of nights spent by foreign visitors to Japan considering the effect of inter-regional cooperation" (Tetsuo Shimizu)
 This research won the 2009 Japan Tourism Agency Commissioner Award on Papers Concerning Demonstrative Analysis Utilizing Tourism Statistics.

【Example Study: 2】 Study on seasonal changes of the number of guests in Hokkaido

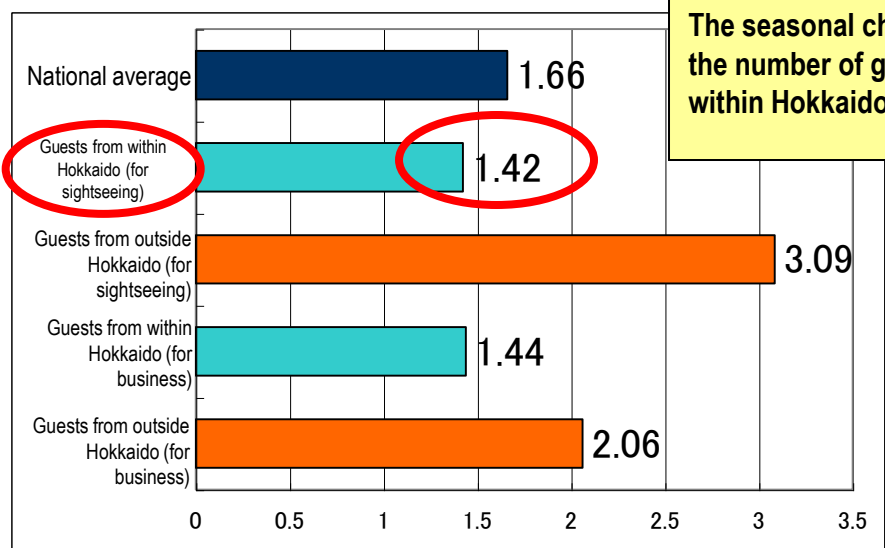
- Mr. Shunichi Asakura at Docon Co., Ltd. analyzed the structure underlying the seasonal changes in the number of nights spent by tourists in Hokkaido as seen **in the light of the statistics on overnight travels.**

◆ Monthly changes in the number of accommodation guests in Hokkaido by their residence (2008)



The seasonal changes are mainly brought about by guests from outside Hokkaido.

◆ Peak to off-peak ratio of the number of guests in Hokkaido by type of guest (2008) (the ratio of the percentage of number of guests in peak months to the percentage of the number of guests in off-peak months)



The seasonal changes in the number of guests from within Hokkaido are small!

Source: "Study on seasonal changes of the number of guests in Hokkaido" (Shunichi Asakura)

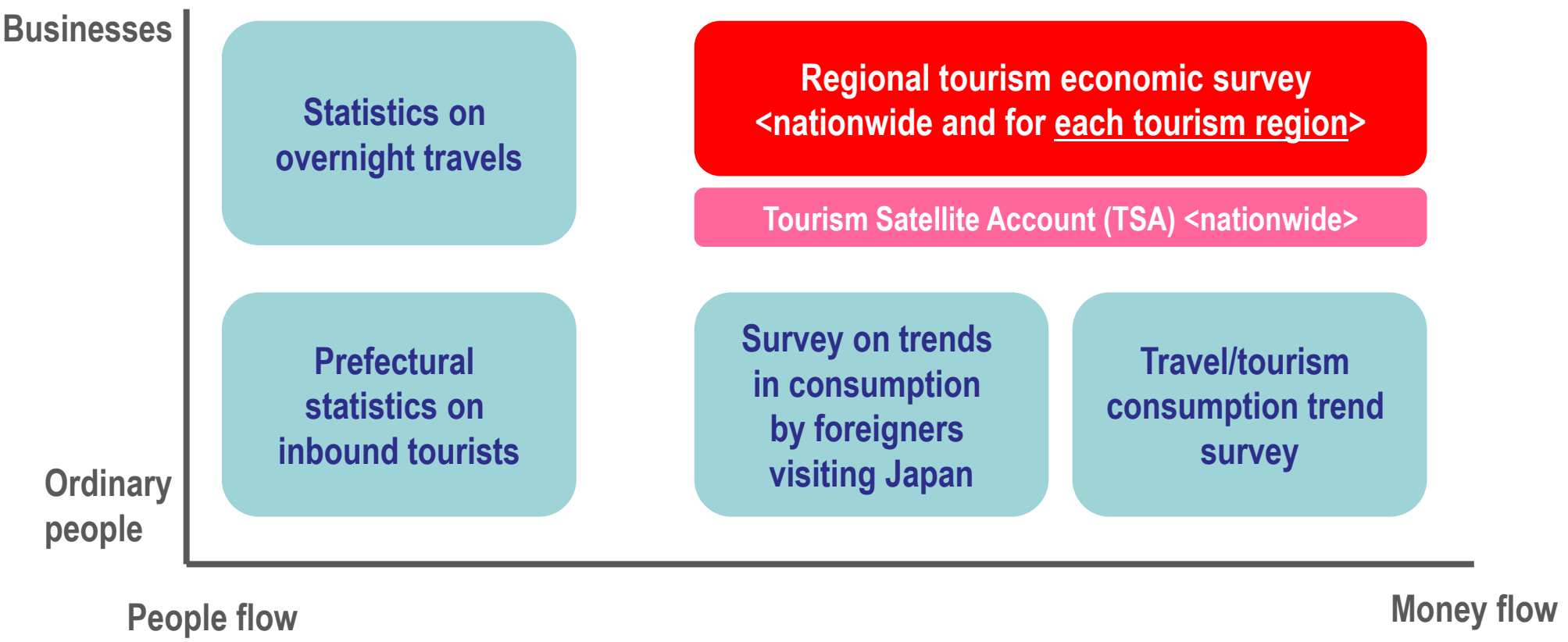
This study won the 2009 Examination Committee Encouragement Award on Papers Concerning Demonstrative Analysis Utilizing Tourism Statistics.

8. Regional Tourism Economic Survey

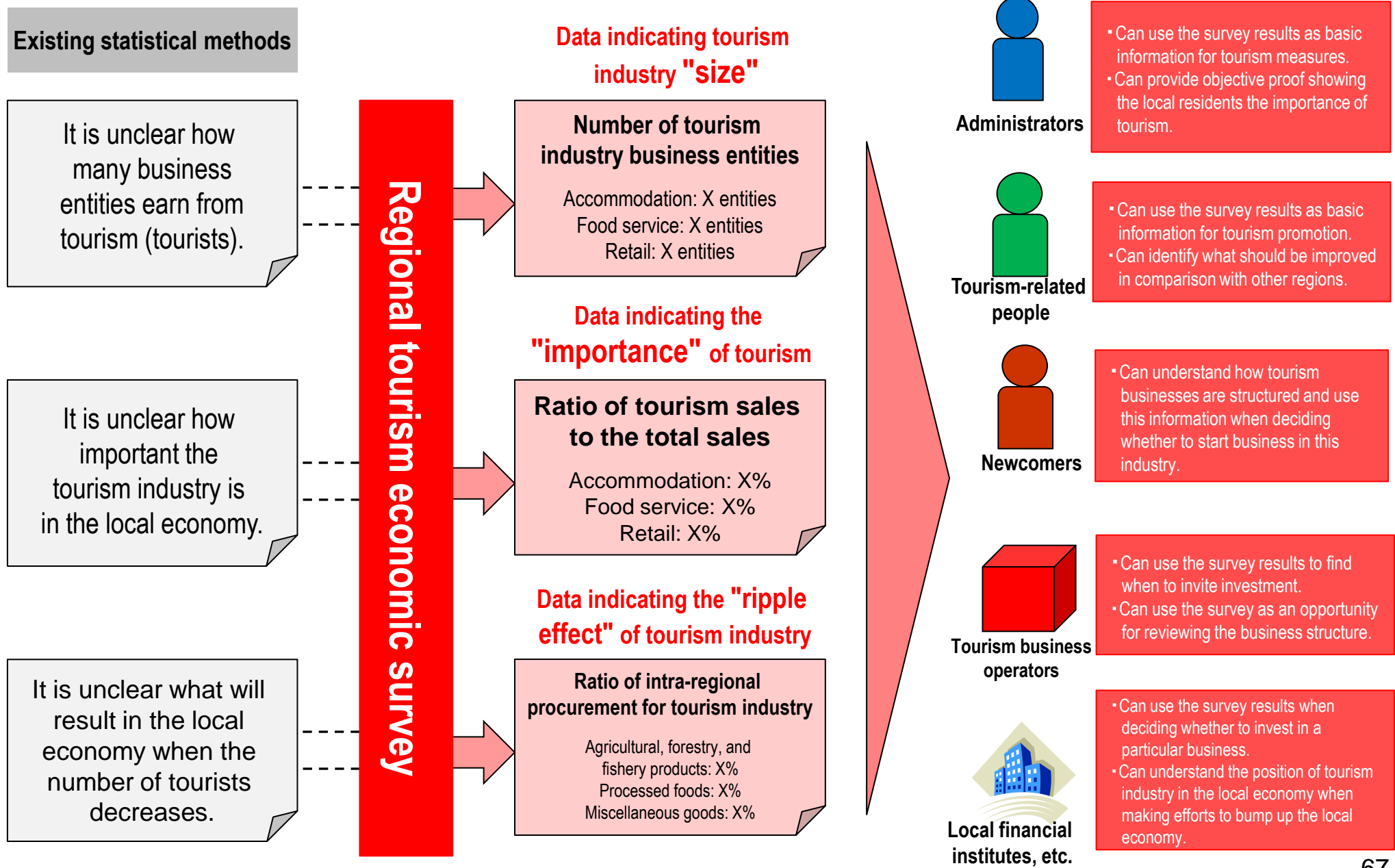
The regional tourism economic survey is to analyze tourism from industrial viewpoints.

- Conventional tourism statistics surveys lacked viewpoints of money by businesses and therefore could not be used to quantitatively understand the economic effect of tourism demands without difficulty.
- The regional tourism economic survey is intended to overcome this difficulty.

Position of each type of tourism statistics



The regional tourism economic survey has been added to visualize the tourism industry.



The regional tourism economic survey is a kind of unparalleled breakthrough.

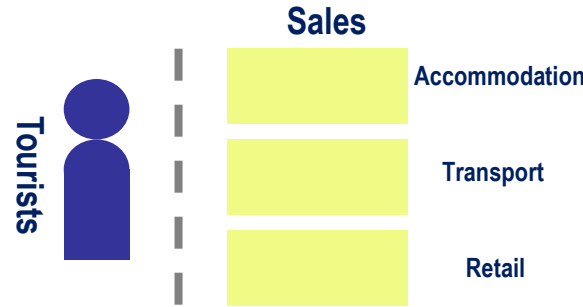
Features of the regional tourism economic survey

Only this survey makes it possible to understand data of business entities from the tourism perspective.

Only this survey makes it possible to understand regional data from the regional tourism perspective.

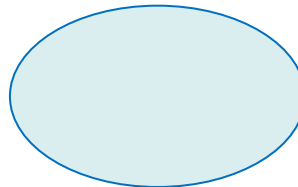
Only this survey makes it possible to directly understand the move of money inside and outside the region (within the municipality, within the prefecture, or outside the prefecture).

Conventional statistical methods



The relationship between tourism demand and the sales of each industry is unknown.

Prefecture X

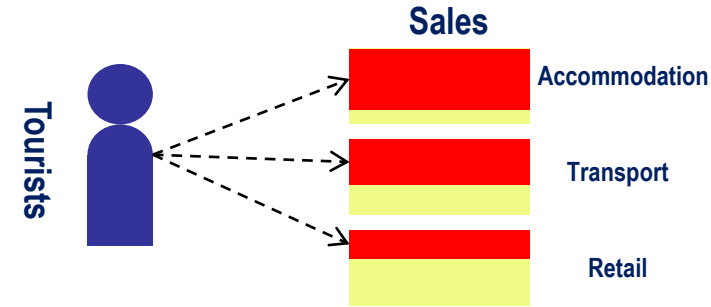


Data is only classified at prefectural or similar administrative level.



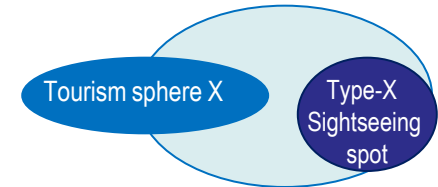
Money flows inside and outside the prefecture are understood only indirectly.

Regional Tourism Economic Survey

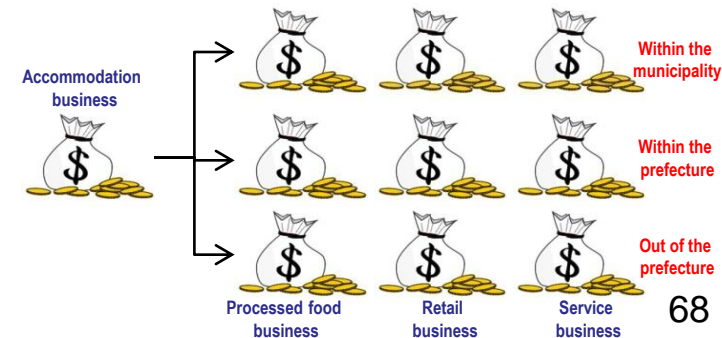


Sales of each industry can be summarized according to whether they are from tourism demand.

Prefecture X



Regional data can be summarized from the tourism viewpoint.



Primary data shows money flows to three layers.

Specific effects of the regional tourism economic survey

Features of the regional tourism economic survey

What can be done if business entity data can be understood from the tourism perspective?

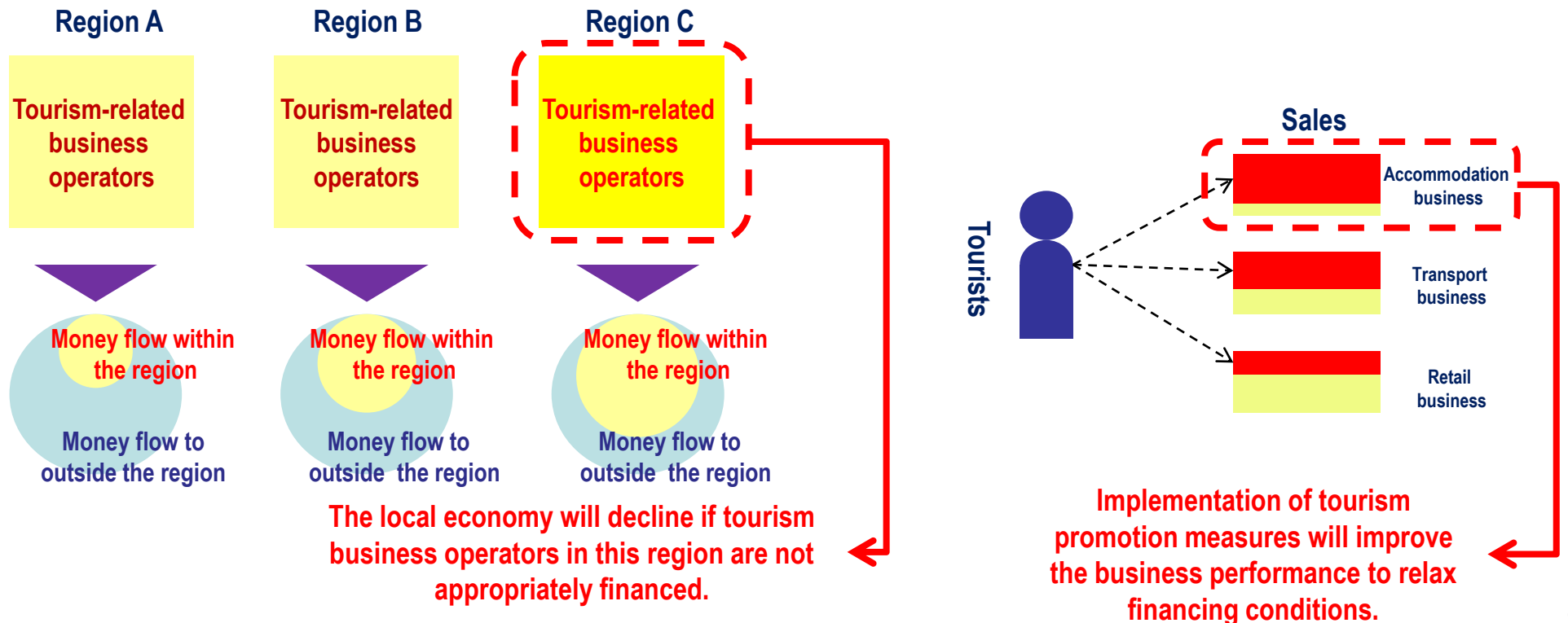
What can be done if regional data can be understood from regional tourism perspective?

What can be done if it is possible to learn how money is moving?

Specific effects

- The contribution of tourism demand, which cannot be confirmed from cash flows of individual businesses, can be identified. This information is likely to add a positive factor **when financial institutions make investment decisions** and, as a result, promote financing to tourism-related industries, thereby **possibly revitalizing the local economy**.
- It will be easier to **develop tourism strategy** for each geographical space having a tourism demand, **and verify its effect**, regardless of which administrative units include this space.
- Because the effect of tourism demand on the region can be understood regardless of what administrative units are involved, **financial institutions and other investors can more easily make investment decisions** when making efforts for **comprehensive revitalization of sightseeing spots**.
- Because it is possible to learn specifically what industries procure products and services from where, **the actual status of regional production and consumption** can be understood for each industry quantitatively on a monetary basis. Measures can thus be prioritized.

- Given information as to what investment will produce what effect on local economy, rather than mere cash flow information, financial institutes can understand how much the local economy will grow as the result of investment in a particular field and can make policy-based investment judgment.
 - If the tourism industry declines in a region where the tourism industry pays to local business entities a lot of money, other industries will also decline in a chain reaction.
 - Therefore, if financial institutions fail to make policy-based investment in tourism business entities in such a region, they will be saddled with bad loans because the entire regional economy will decline.
- Because financial institutions can understand how much a particular industry will benefit from tourism, they can more easily decide on investment in a business entity when an external factor that could increase the number of tourists is expected, even if the business entity's current cash flow is not so satisfactory.



1. Purpose of the survey

- To clarify the tourism industry related quantities, scales (sales, employment, etc.) and ripple effects on the region by collecting basic data, and to use this data to publish relevant statistics for tourism marketing, etc.

2. Numbers of survey target regions and business entities

- 112 regions (58 tourism areas): 52,754 business entities (See the next page.)

3. Survey method

- Send by mail a questionnaire to business entities that are considered to be engaged in an industry seemingly relating to tourists, and collect by mail answers from the entities.

4. Schedule of the survey

- November 11 and 14, 2011: Questionnaire sending
- November 28, 2011: Deadline for answers to the questionnaire
Issuance of demand notices, inquiries about questionable points, and collection
- March 2, 2012: Aggregation

5. Survey target industries

- Industries specified by UNWTO (United Nations World Tourism Organization), quoted from the list of establishments and enterprises in the "2009 Economic Census - Basic Survey"
+
- Business entities listed in the sightseeing spot list created through the prefectural statistics on inbound tourists

The preliminary survey was conducted in 112 tourism regions all over the country.

- Preliminary survey was conducted in the 112 tourism regions (58 tourism areas) that were selected from survey target candidate regions.

Hokkaido	Hakodate tourism area
Hokkaido	Furano tourism area
Hokkaido	Niseko tourism area
Aomori Prefecture	Hirosaki tourism area
Akita Prefecture	Oga tourism area
Akita Prefecture	Nikaho City Kisakata tourism area
Yamagata Prefecture	Gassan tourism area
Ibaraki Prefecture	Nakaminato tourism area
Ibaraki Prefecture	Okukuji tourism area
Tochigi Prefecture	Nasu tourism area
Gunma Prefecture	Maebashi tourism area
Gunma Prefecture	Kusatsu tourism area
Gunma Prefecture	Katashina tourism area
Chiba Prefecture	Minamiboso City tourism area
Tokyo	Sensoji Temple and surrounding area
Tokyo	Ota-ku tourism area
Kanagawa Prefecture	Kamakura tourism area
Toyama Prefecture	Kurobe and Unazuki Spa tourism area
Toyama Prefecture	Himi tourism area
Fukui Prefecture	Katsuyama tourism area

Yamanashi Prefecture	Fuji-Kawaguchiko tourism area
Nagano Prefecture	Iida City tourism area
Nagano Prefecture	Nozawa Onsen and Nozawa Onsen Ski Resort
Gifu Prefecture	Ooi tourism area
Gifu Prefecture	Shirakawa-go tourism area
Gifu Prefecture	Oku-Hida Onsen Village tourism area
Shizuoka Prefecture	Hamamatsu City tourism area
Shizuoka Prefecture	Atami City tourism area
Aichi Prefecture	Irako tourism area
Mie Prefecture	Shima City tourism area
Mie Prefecture	Toba tourism area
Shiga Prefecture	Canals and castle town area
Kyoto Prefecture	Kyoto City tourism area
Hyogo Prefecture	Himeji Castle and surrounding tourism area
Hyogo Prefecture	Akashi Station and surrounding tourism area
Nara Prefecture	Sakurai "Himiko country" tourism area
Nara Prefecture	Katsuragi City tourism area
Wakayama Prefecture	Nachi-Katsuura tourism area
Tottori Prefecture	Kurayoshi City tourism area
Tottori Prefecture	Yokai (specters) tourism area

Shimane Prefecture	Matsue City tourism area
Hiroshima Prefecture	Kure tourism area
Hiroshima Prefecture	Onomichi tourism area
Yamaguchi Prefecture	Shimonoseki tourism area
Yamaguchi Prefecture	Hagi tourism area
Yamaguchi Prefecture	Ube and Mine industrial tourism area
Tokushima Prefecture	Oboke and Iya tourism area
Kagawa Prefecture	Kotohira tourism area
Ehime Prefecture	Dogo Spa tourism area
Kochi Prefecture	Town of history, culture, and education area
Fukuoka Prefecture	Itoshima tourism area
Saga Prefecture	Karatsu tourism area
Saga Prefecture	Furueda tourism area
Kumamoto Prefecture	Takamori tourism area
Miyazaki Prefecture	Miyazaki City tourism area
Okinawa Prefecture	Naha City tourism area
Okinawa Prefecture	Itoman City tourism area
Okinawa Prefecture	Nago City tourism area

Tourism industry business entities handled in the regional tourism economic survey

- Business entities that are engaged in industries defined in the TSA (Tourism Satellite Account) international standard (table below).
- Business entities that are engaged in other industries and listed in the sightseeing spot list created as part of the prefectural statistics on inbound tourists.

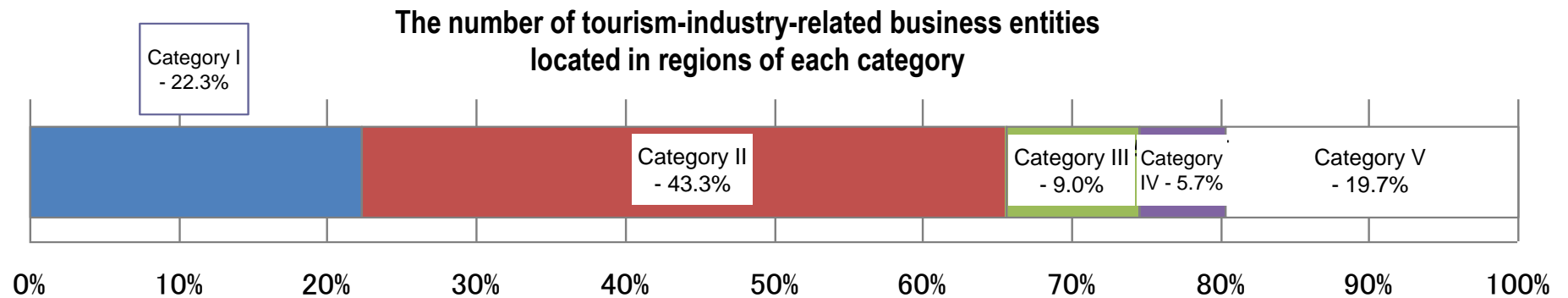
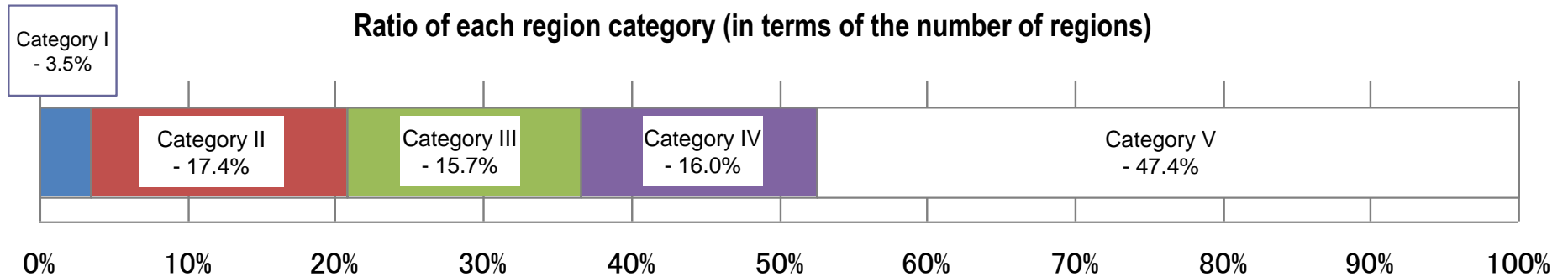
TSA tourism industry classification	Japan Standard Industrial Classification (industrial classification in 2009 Economic Census - Basic Survey)
Accommodation service	751 Hotels, 752 Common lodging houses, 75A Lodging facilities of companies and associations, 75B: Lodging places, n.e.c.
Food service	761 Eating places, except specialty restaurants, 763 "Soba" and "udon" (Japanese noodles) restaurants, 764 "Sushi" bars, 765 Drinking houses and beer halls, 766 Bars, cabarets and night clubs, 767 Coffee shops, 76A Japanese restaurants, 76B Chinese restaurants, 76C Grilled meats restaurants (Japanese style), 76D Miscellaneous specialty restaurants, 76E Hamburger shops, 76F "Okonomiyaki," "Yakisoba" and "Takoyaki" (Japanese snacks) shops, 76G Eating and drinking places, n.e.c., 771 Food take out services, 772 Food delivery services
Passenger transport service	421 Railway transport (except cargo transport), 431 Common omnibus operators, 432 Common taxicab operators, 433 Contracted omnibus operators, 439 Miscellaneous road passenger transport, 451 Oceangoing transport (except cargo transport), 452 Coastwise transport (except cargo transport), 453 Inland water transport (except cargo transport), 461 Air transport (except cargo transport), 693 Automobile parking
Transport equipment rental service	704 Automobile rental
Travel agency and other reservation service	791 Travel agency
Cultural service	802 Performances (except otherwise classified), theatrical companies, 82C Museums and art museums, 82D Zoological gardens, botanical gardens and aquariums, 941 Shintoism, 942 Buddhism, 943 Christianity, 949 Miscellaneous religions
Sports and entertainment service	705 Sports and hobby goods rental, 785 Miscellaneous public bathhouses, 803 Bicycle, horse, motorcar and motorboat race track operations and companies, 80B Gymnasiums (sports hall), 80C Golf courses, 80F Tennis clubs, 805 Public gardens and amusement parks
Retail	561 Department stores and general merchandise supermarkets, 569 Miscellaneous retail trade, general merchandise, 571 Dry goods, cloth and bedding stores, 572 Men's clothing stores, 573 Ladies' and children's clothing, 574 Footwear stores, 579 Miscellaneous dry goods, apparel and apparel accessories stores, 581 Grocery stores, 582 Vegetable and fruit stores, 583 Meat and poultry stores, 584 Fresh fish stores, 585 Liquor stores, 586 Confectioneries and bakeries, 58A Delicatessen stores, 58B Retail food and beverage stores, n.e.c., 605 Fuel stores

Tourism regions all over the country are stratified into five tourism region categories (layers).

- Based on the sightseeing spot classification in the sightseeing spot list, the tourism regions (including regions that have no sightseeing spot) are stratified into the five categories:

Tourism region category (names are tentative)	Characteristics
Region category I: Full-set type tourism region	Includes historical, cultural, or similar tourism resources, etc. as well as tourism resources that attract tourists who want to shop, drink, eat, etc.
Region category II: Authentic type tourism region	Includes historical, cultural, or similar tourism resources, etc.
Region category III: Activity-centered tourism region	Includes tourism resources that can serve as facilities for sports, recreation, or other activities.
Region category IV: Originality-based tourism region	Includes tourism resources, etc. other than the above.
Region category V: Other regions	Includes no sightseeing spot that attracts 10,000 or more inbound tourists per year.

- The number of tourism regions all over the country that fall in category I or II slightly exceeds 20%. In this area, which is slightly over 20%, about two-thirds of tourism industry business entities all over the country are concentrated.
- In particular, it is obvious that there are a large number of tourism industry business entities in regions of category I.



- The following table outlines the results of preliminary survey on the following four tourism regions (selected from all preliminary survey target regions).

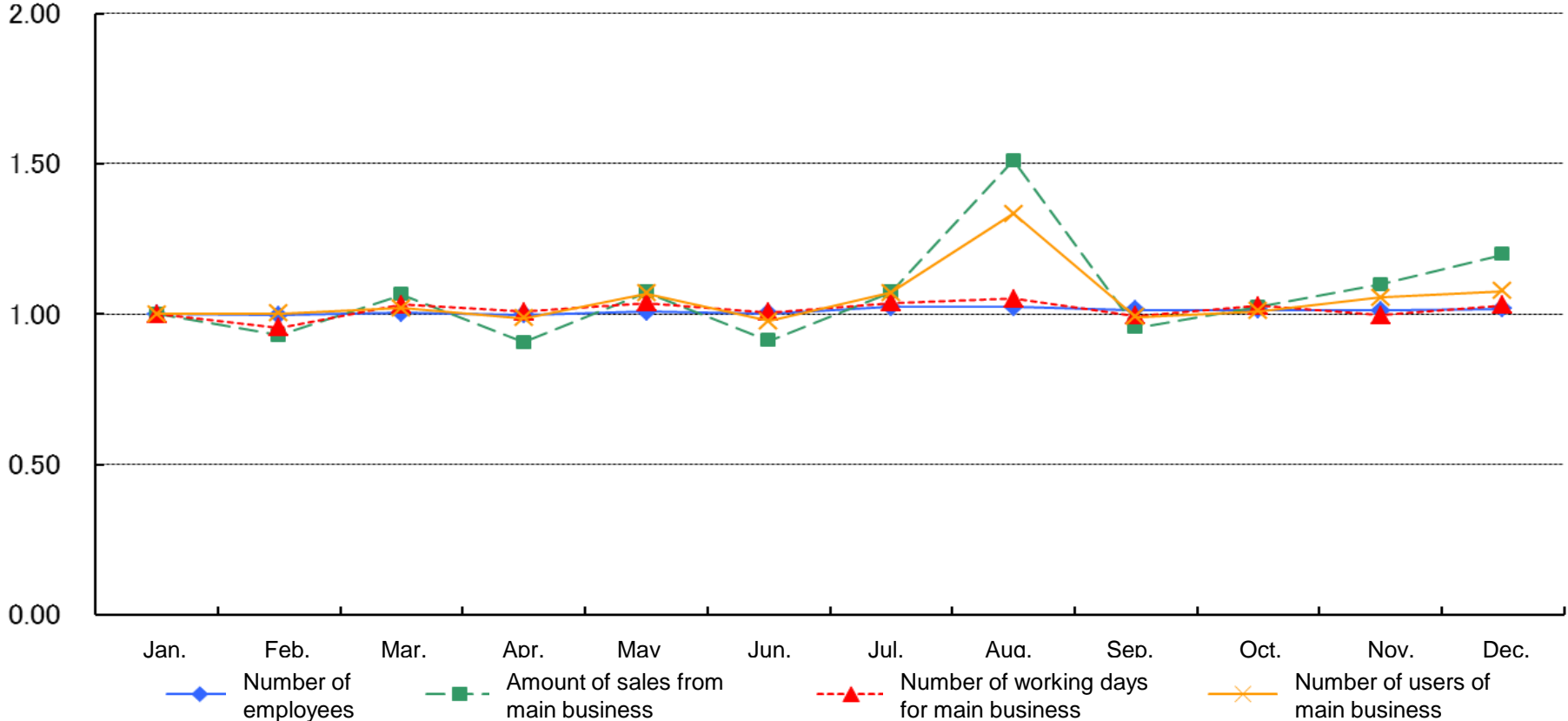
	Major tourism resources	Total number of inbound tourists (1,000 persons)	Number of tourism industry business entities
Region category II: Atami City (currently Atami City)	<ul style="list-style-type: none"> Atami Ropeway MOA Museum of Art Atami Sun Beach 	1,799	1,264
Region category II: Hamamatsu City (currently Hamamatsu City)	<ul style="list-style-type: none"> Hamamatsu Science Museum Hamamatsu Castle Hamamatsu Museum of Musical Instruments 	1,379	2,344
Region category III: Ugata Village (currently Shima City)	<ul style="list-style-type: none"> Kintetsu Kashikojima Country Club Yokoyama Visitor Center Ago Ryokan Street 	646	252
Region category III: Kamitakara Village (currently Takayama City)	<ul style="list-style-type: none"> Shinhotaka Ropeway Road Station "Kamitakara/Oku-Hida Onsen Village" Campsite (Kamitakara) 	1,464	216

The total number of inbound tourists was calculated based on the values in the 2011 sightseeing spot list.

Seasonal fluctuations in tourism sales and the number of users in Atami City (category II)

- In Atami City, the sales from main business peak in August.
- The number of users also peaks in August.
- The fluctuations in the number of users and the sales from main business almost match. This suggests that the per-capita consumption amount (yen/person) is stable through the year.

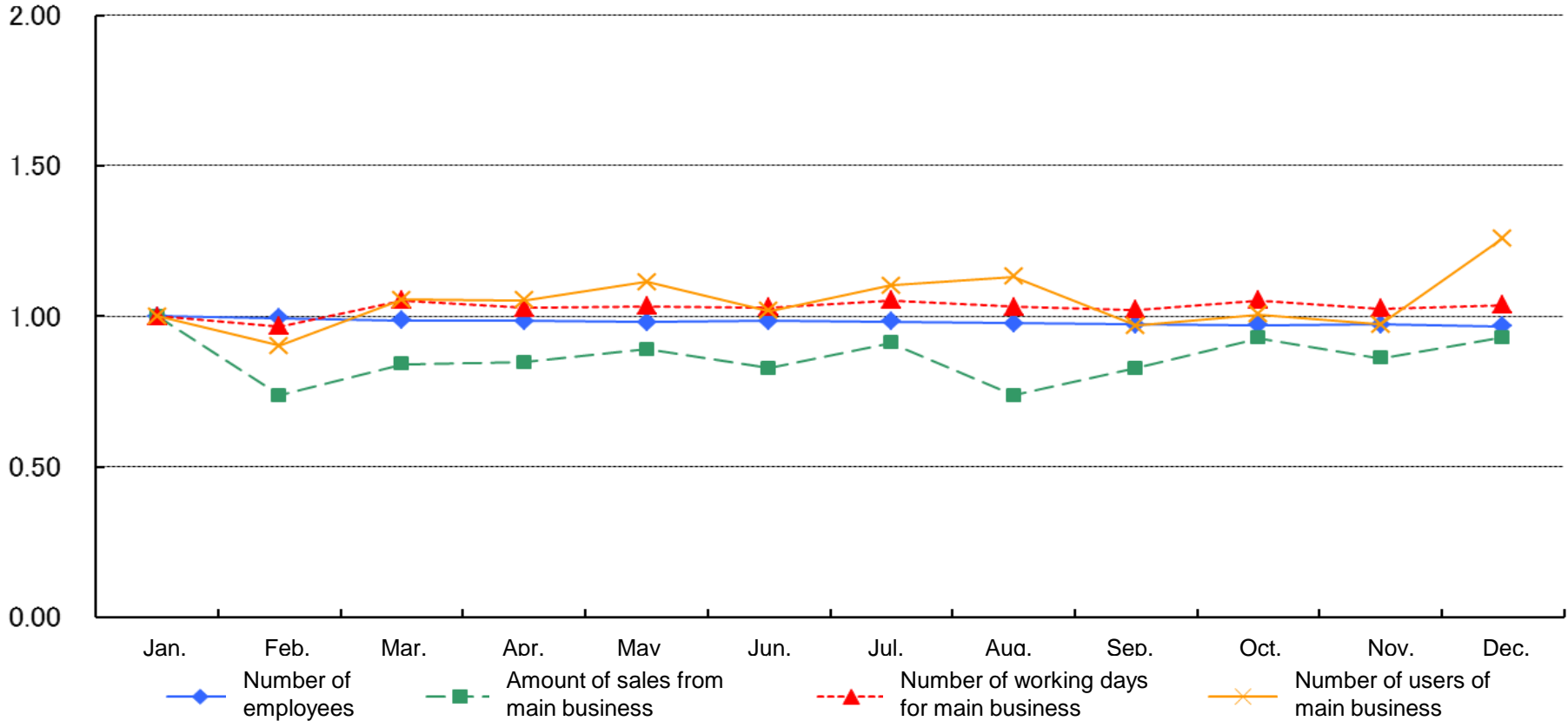
(Index: Relative to 1.00 in January)



Seasonal fluctuations in tourism sales and the number of users in Hamamatsu City (category II)

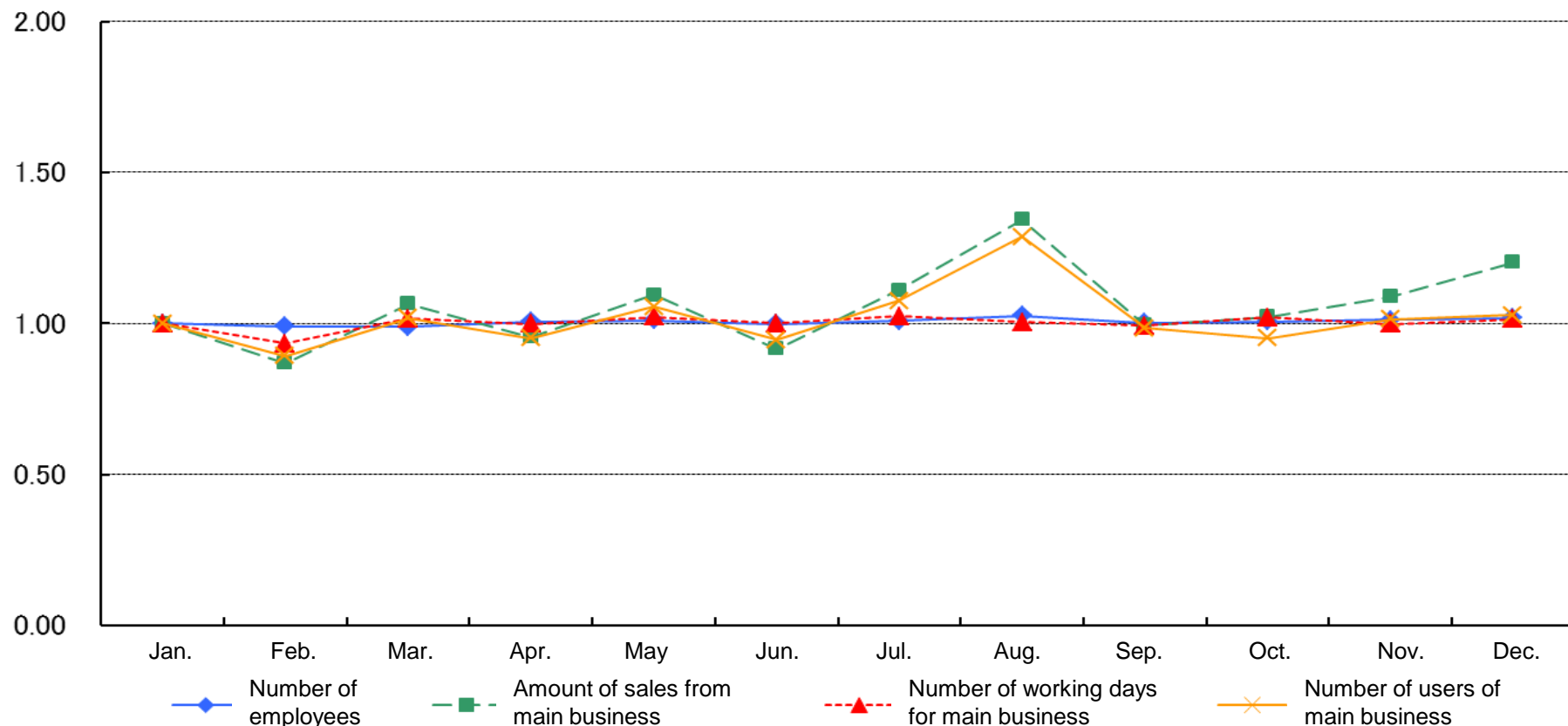
- In Hamamatsu City, the sales from main business slightly drop in February and August, but the fluctuations are small.
- The number of users peaks in December.
- The fluctuations in the number of users and the sales from main business almost match. This suggests that the per-capita consumption amount (yen/person) is stable through the year. (Since the number of users is generally under 1.00 and the sales from main business are generally above 1.00, the per-capita consumption amount (yen/person) in reference January is higher than in the other months.)

(Index: Relative to 1.00 in January)



- In Ugata Village, the sales from main business show a large peak in August and a small peak in December.
- The number of users shows a large peak in August.
- The fluctuations in the number of users and the sales from main business almost match. This suggests that the per-capita consumption amount (yen/person) is stable through the year. (The per-capita consumption amount is slightly higher in December.)

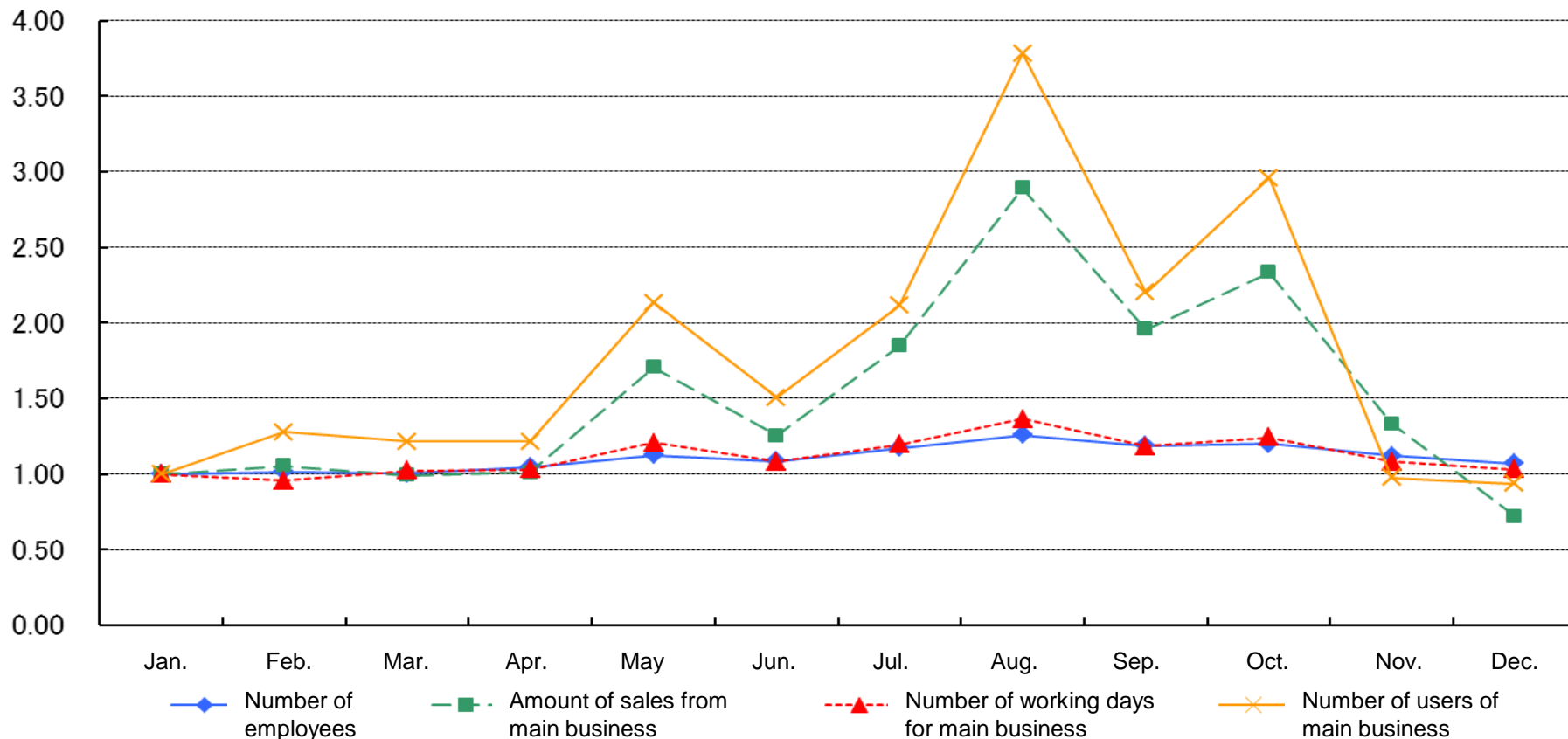
(Index: Relative to 1.00 in January)



Seasonal fluctuations in tourism sales and the number of users in Kamitakara Village (currently Takayama City) (category III)

- In Kamitakara Village, the sales from main business peak in May, August, and October. The peak in August is particularly large.
- The number of users also peaks in May, August, and October.
- When looking at the data in May, August, and October, we can find that the growth in the number of users is larger than the growth in the sales from main business -- this suggests that the per-capita consumption amount (yen/person) is slightly lower in these peak months.

(Index: Relative to 1.00 in January)



Ratio of Tourism Sales by Business Type

- The ratio of the tourism sales to the sales from main business in the region is in the range from 7% (Hamamatsu City) to 75% (Kamitakara Village).
- When tourism sales are broken down into industrial segments, different locations are found to show distinctive characteristics. Atami City and Kamitakara Village have high shares in accommodation business; Hamamatsu City has a high share in life-related service and entertainment business; Ugata Village has a high share in accommodation, retail, life-related service, and entertainment business.

Representative region		Total	Retail business	Passenger transport business	Goods rental business	Accommodation business	Food service business	Life-related service and entertainment business	Social education business	Others	Unknown
Region category II: Atami City (currently Atami City)	Sales from main business (million yen)	21,205	6,557	1,390	243	8,502	2,963	516	494	540	3
	Tourism sales (million yen)	12,353	1,408	367	97	8,255	1,352	516	252	0	106
	(Percentage Ratio of tourism sales)	(58.3%)	(21.5%)	(26.4%)	(39.9%)	(97.1%)	(45.6%)	(100.0%)	(51.0%)	(0.0%)	(3122.7%)
Region category II: Hamamatsu City (currently Hamamatsu City)	Sales from main business (million yen)	147,421	111,936	3,263	1,077	1,523	5,789	22,146	84	1,602	21
	Tourism sales (million yen)	10,086	104	1,888	106	179	337	6,681	7	0	785
	(Percentage Ratio of tourism sales)	(6.8%)	(0.1%)	(57.9%)	(9.8%)	(11.7%)	(5.8%)	(30.2%)	(8.3%)	(0.0%)	(3780.7%)
Region category III: Ugata Village (currently Shima City)	Sales from main business (million yen)	2,947	1,469	61	40	437	672	265	0	3	1
	Tourism sales (million yen)	1,106	274	10	24	430	102	265	0	0	0
	(Percentage Ratio of tourism sales)	(37.5%)	(18.6%)	(16.8%)	(60.0%)	(98.5%)	(15.2%)	(100.0%)		(0.0%)	(0.0%)
Region category III: Kamitakara Village (currently Takayama City)	Sales from main business (million yen)	5,285	583	930	0	3,623	69	55	0	26	1
	Tourism sales (million yen)	3,967	247	2	0	3,603	43	50	0	0	23
	(Percentage Ratio of tourism sales)	(75.1%)	(42.3%)	(0.2%)		(99.5%)	(62.6%)	(90.0%)		(0.0%)	(3456.3%)

Atami City (category II): About 29.7% of the money that comes from tourism demand is circulating within the region.

* The figures are the simple sums of the values answered by individual business entities.

Number of business entities that answered the questionnaire	399
Sales from all industries	35,238,830,000 yen (*)

* The sales amounts are the sums of the values from individual business entities that answered the questionnaire.

Tourism industry business entities
(annual total purchasing and outsourcing cost: 5,555,120,000 yen)

Top three item types in the rate of procurement from within the region (50% or higher)

1. Medicines and cosmetics:	87.9%
2. Security services:	58.1%
3. Building services:	54.4%

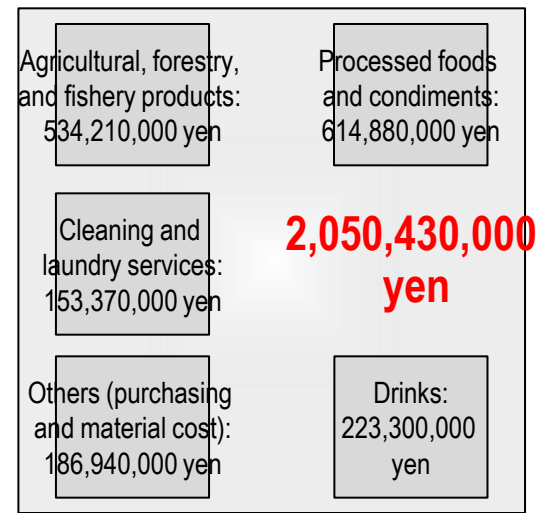
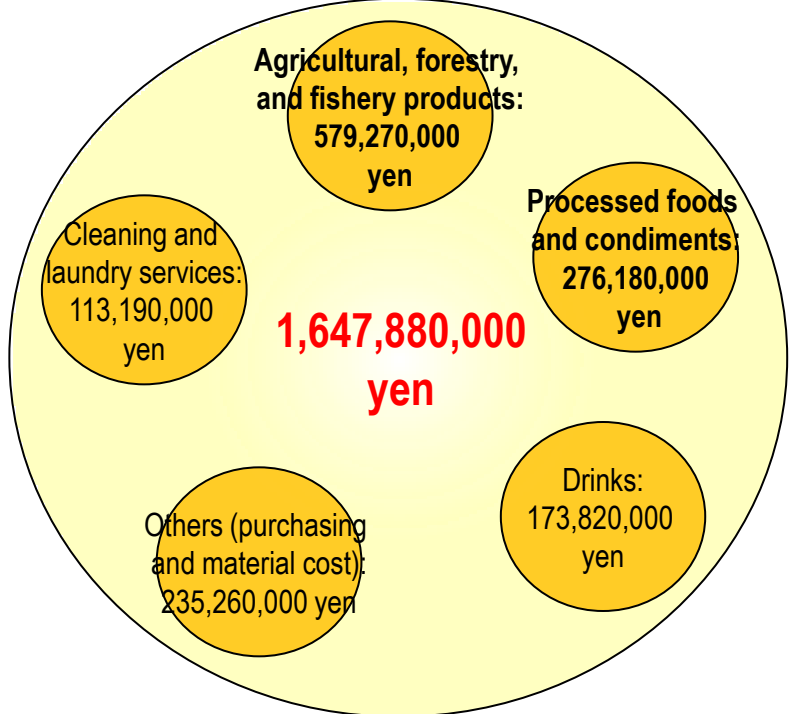
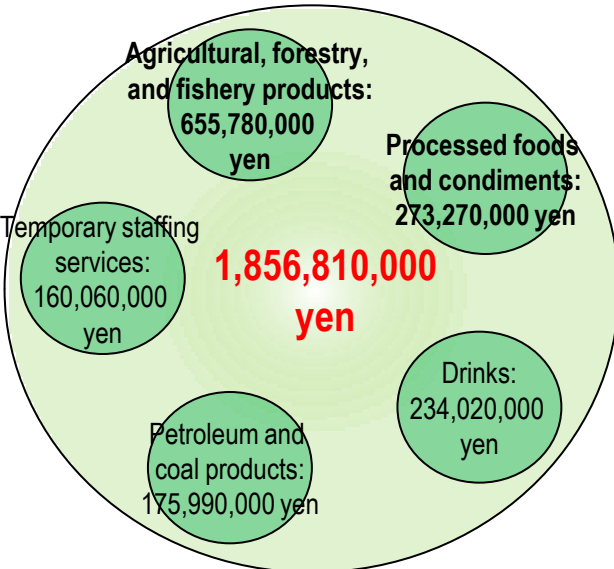
Bottom three item types in the rate of procurement from within the region

1. Ceramic and glass products:	0.0%
2. Other manufactured goods:	2.9%
3. Electric appliances:	3.1%

Within the municipality (within the region) **29.7%**

33.4% **Within the prefecture (other municipalities)**

Other prefectures **36.9%**



Hamamatsu City (category II): About 28.7% of the money that comes from tourism demand is circulating within the region.

* The figures are the simple sums of the values answered by individual business entities.

Number of business entities that answered the questionnaire	611
Sales from all industries	170,640,880,000 yen (*)

* The sales amounts are the sums of the values from individual business entities that answered the questionnaire.

Tourism industry business entities
(annual total purchasing and outsourcing cost: 16,267,440,000 yen)

Top three item types in the rate of procurement from within the region (50% or higher)

- 1. Feedstuffs and fertilizers: 100.0%
- 1. Electric appliances: 100.0%
- 3. Paper and wood products: 91.1%

Bottom three item types in the rate of procurement from within the region

- 1. Agricultural, forestry, and fishery products: 9.0%
- 2. Building services: 16.4%
- 3. Processed foods and condiments: 17.5%

Within the municipality (within the region)

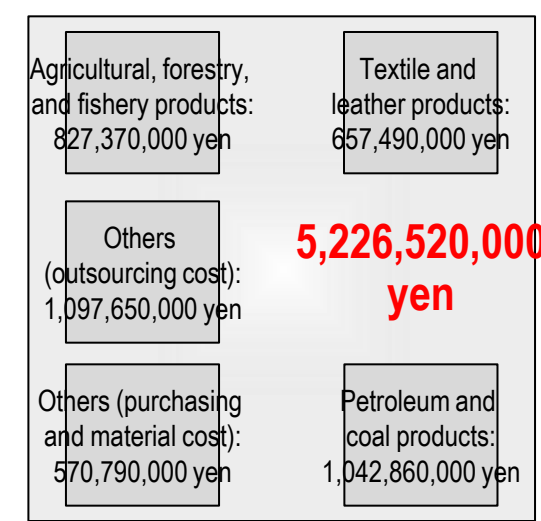
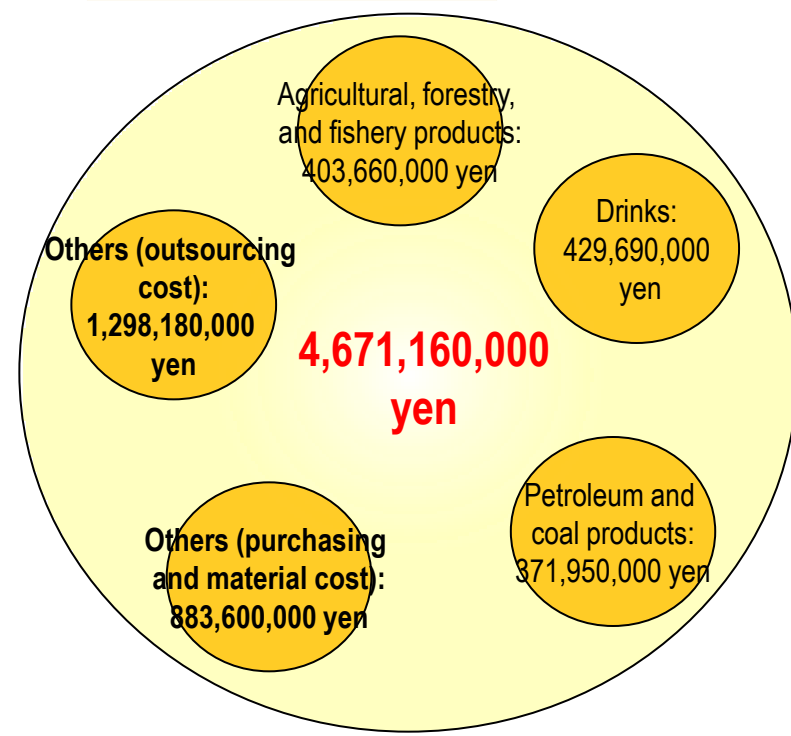
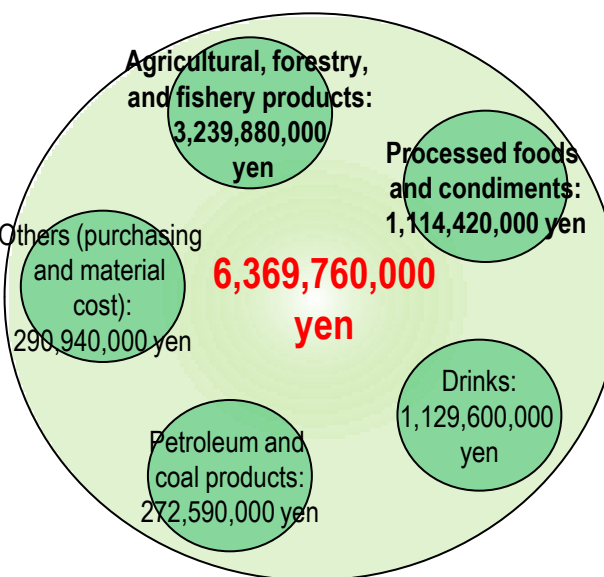
28.7%

39.2%

Within the prefecture (other municipalities)

Other prefectures

32.1%



Ugata Village (category III): About 23.3% of money that comes from tourism demand is circulating within the region.

* The figures are the simple sums of the values answered by individual business entities.

Number of business entities that answered the questionnaire	76
Sales from all industries	4,140,820,000 yen (*)

* The sales amounts are the sums of the values from individual business entities that answered the questionnaire.

Tourism industry business entities
(annual total purchasing and outsourcing cost: 1,384,690,000 yen)

Top three item types in the rate of procurement from within the region (50% or higher)

1. Ceramic and glass products:	100.0%
2. Temporary staffing services:	50.1%
3. -	

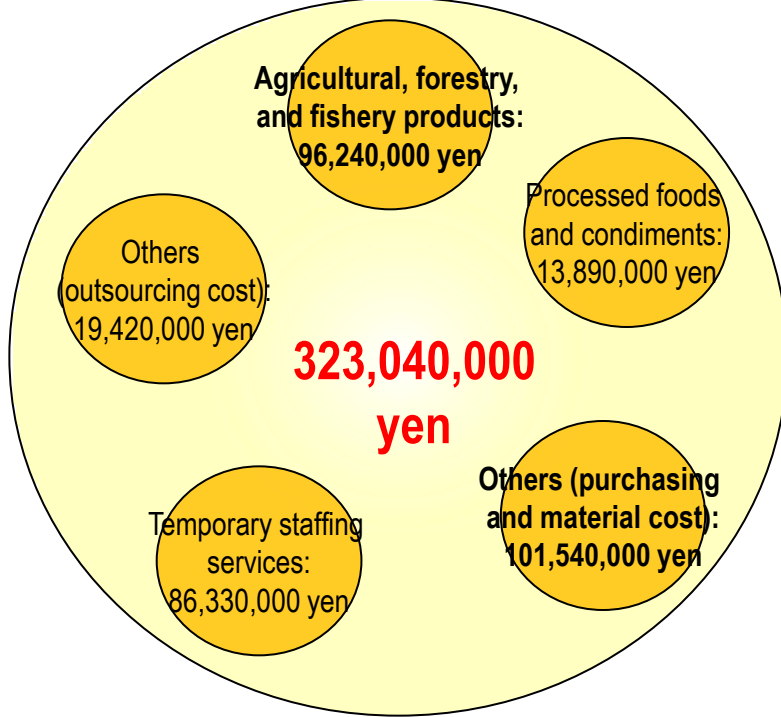
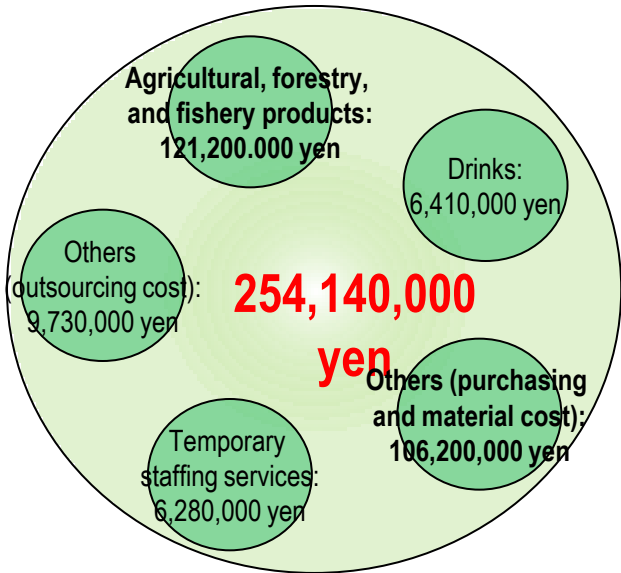
Bottom three item types in the rate of procurement from within the region

1. Textile and leather products:	0.0%
1. Paper and wood products:	0.0%
1. Medicines and cosmetics:	0.0%
1. Books, newspapers, and magazines:	0.0%

Within the municipality (within the region) 23.3%

Within the prefecture (other municipalities) 18.4%

Other prefectures 58.3%



Processed foods and condiments:	127,970,000 yen	Drinks:	247,370,000 yen
Temporary staffing services:	79,810,000 yen	807,510,000 yen	
Petroleum and coal products:	248,260,000 yen	Textile and leather products:	40,810,000 yen

Kamitakara Village (category III): About 57.3% of money that comes from tourism demand is circulating within the region.

* The figures are the simple sums of the values answered by individual business entities.

Number of business entities that answered the questionnaire	69
Sales from all industries	6,068,600,000 yen (*)

* The sales amounts are the sums of the values from individual business entities that answered the questionnaire.

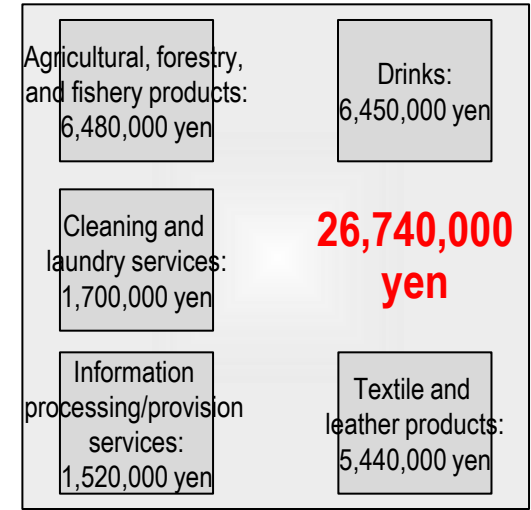
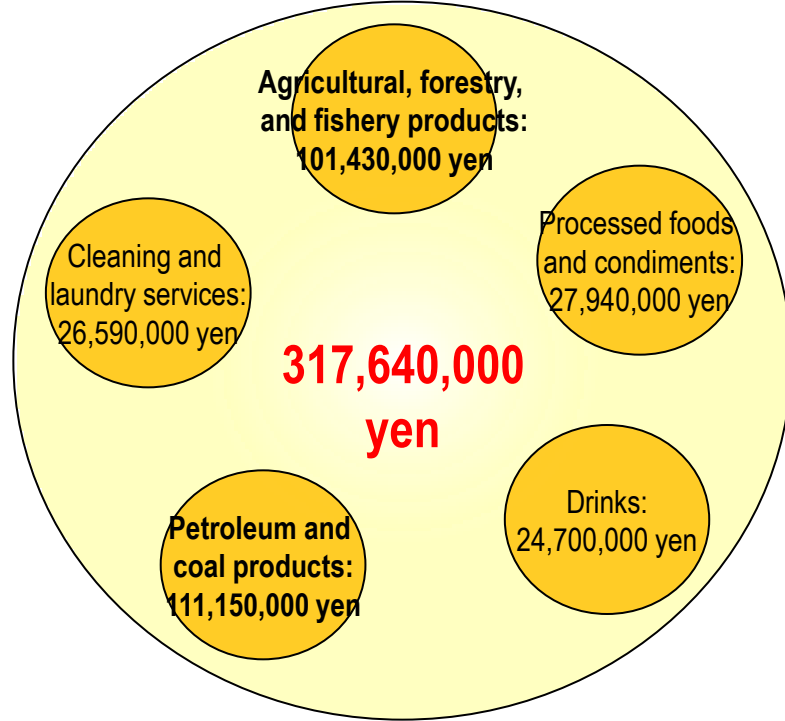
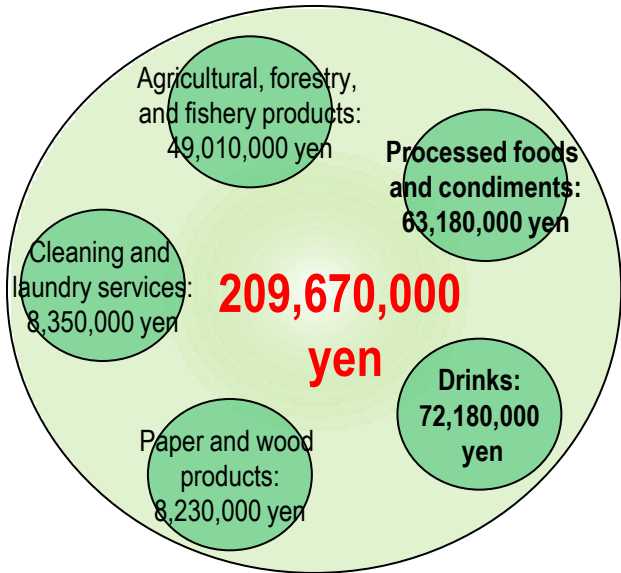
Tourism industry business entities
(annual total purchasing and outsourcing cost: : 554,050,000 yen)

- Top three item types in the rate of procurement from within the region (50% or higher)**
- 1. Ceramic and glass products: 100.0%
 - 1. Medicines and cosmetics: 100.0%
 - 1. Electric appliances: 100.0%
 - 1. Temporary staffing services: 100.0%
- Bottom three item types in the rate of procurement from within the region**
- 1. Books, newspapers, and magazines: 0.0%
 - 1. Building services: 0.0%
 - 3. Textile and leather products: 15.9%

Within the municipality (within the region) 57.3%

37.8%
Within the prefecture (other municipalities)

Other prefectures 4.8%



Atami City (category II) [average sales]

The average sales of a non-corporate business is 14 million yen, whereas the average sales of a corporate business is about 210 million yen.

- For non-corporate businesses, the sales amount and cost are similar.
- A noteworthy point on corporate businesses is that **the sales commission is relatively high (about 12 million yen)**.

Non-corporate businesses

	Total	Average
Sales (revenue) amount (10 thousand yen)	204,413	1,400
Total cost (sales cost + expenditures) (10 thousand yen)	148,915	1,146

Corporate businesses

	Total	Average
Sales (10 thousand yen)	2,964,176	21,173
Sales cost (10 thousand yen)	911,873	7,728
Selling expenses and general administrative expenses (10 thousand yen)	1,503,800	13,427
Purchasing and material cost (10 thousand yen)	714,032	6,611
Outsourcing cost (10 thousand yen)	31,700	881
Sales commission (10 thousand yen)	49,625	1,241
Advertising expenses (10 thousand yen)	23,387	292
Employee training cost (10 thousand yen)	1,285	41

Hamamatsu City (category II) [average sales]

The average sales of a non-corporate business is 23.2 million yen, whereas the average sales of a corporate business is about 770 million yen.

- For non-corporate businesses, the sales amount and cost are similar.
- A noteworthy point on corporate businesses is that **the sales commission is relatively high (about 25 million yen)**.

Non-corporate businesses

	Total	Average
Sales (revenue) amount (10 thousand yen)	617,158	2,320
Total cost (sales cost + expenditures) (10 thousand yen)	454,007	2,027

Corporate businesses

	Total	Average
Sales (10 thousand yen)	12,852,784	76,963
Sales cost (10 thousand yen)	6,805,071	47,257
Selling expenses and general administrative expenses (10 thousand yen)	5,061,963	36,949
Purchasing and material cost (10 thousand yen)	5,679,402	46,552
Outsourcing cost (10 thousand yen)	350,247	8,339
Sales commission (10 thousand yen)	118,990	2,532
Advertising expenses (10 thousand yen)	63,470	628
Employee training cost (10 thousand yen)	14,913	382

Ugata Village (category III) [average sales]

The average sales of a non-corporate business is 9.64 million yen, whereas the average sales of a corporate business is about 130 million yen.

- For non-corporate businesses, the sales amount and cost are similar.
- A noteworthy point on corporate businesses is that **the outsourcing cost is relatively high (about 65 million yen)**.

Non-corporate businesses

	Total	Average
Sales (revenue) amount (10 thousand yen)	30,841	964
Total cost (sales cost + expenditures) (10 thousand yen)	22,341	798

Corporate businesses

	Total	Average
Sales (10 thousand yen)	349,731	13,451
Sales cost (10 thousand yen)	157,664	7,508
Selling expenses and general administrative expenses (10 thousand yen)	136,533	8,031
Purchasing and material cost (10 thousand yen)	124,069	7,754
Outsourcing cost (10 thousand yen)	26,226	6,557
Sales commission (10 thousand yen)	8,163	907
Advertising expenses (10 thousand yen)	2,405	241
Employee training cost (10 thousand yen)	72	24

Kamitakara Village (category III) [average sales]

The average sales of a non-corporate business is 11.43 million yen, whereas the average sales of a corporate business is about 180 million yen.

- For non-corporate businesses, the sales amount and cost are similar.
- A noteworthy point on corporate businesses is that **the sales commission is relatively high (about 26 million yen)**.

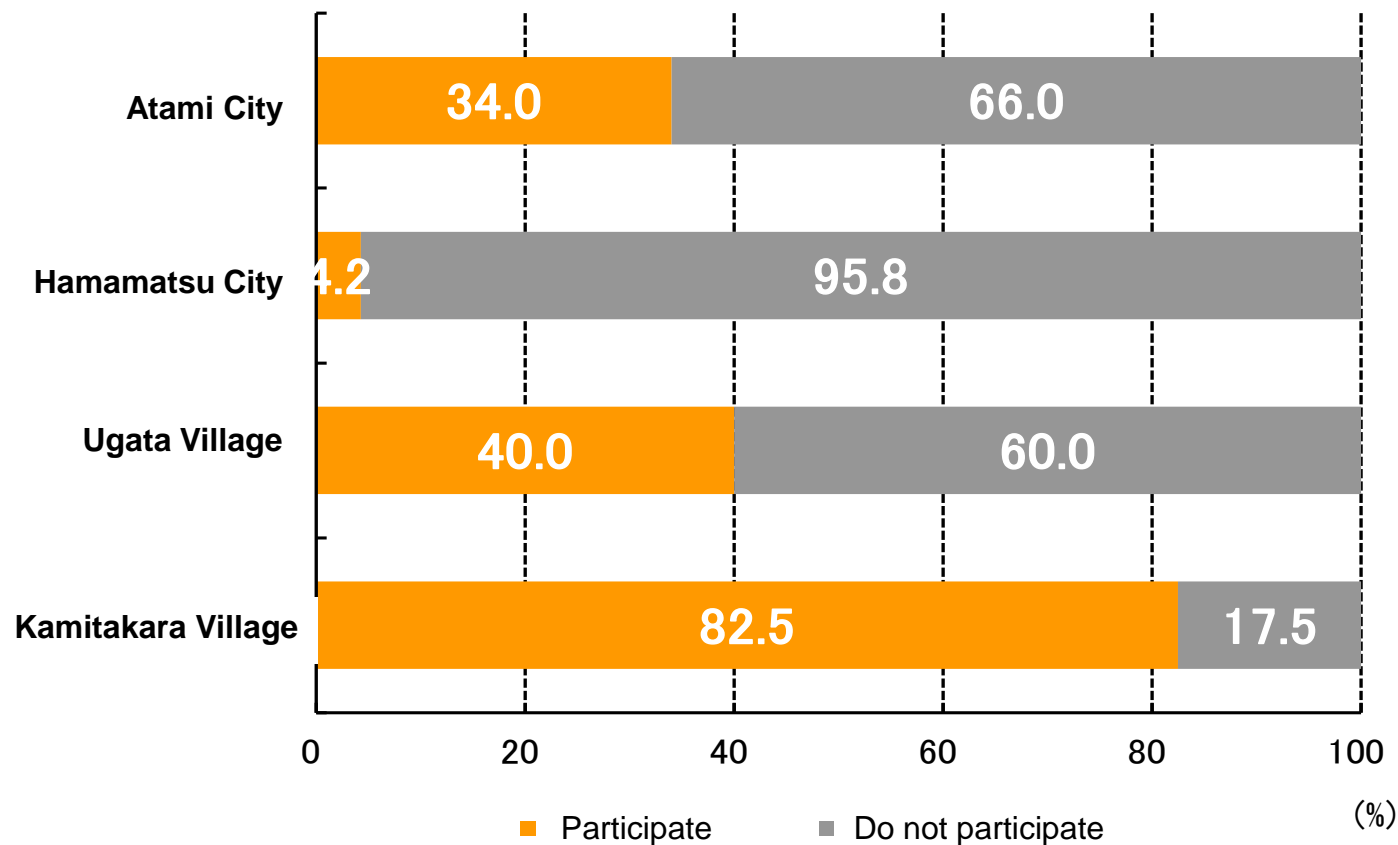
Non-corporate businesses

	Total	Average
Sales (revenue) amount (10 thousand yen)	34,293	1,143
Total cost (sales cost + expenditures) (10 thousand yen)	25,193	1,008

Corporate businesses

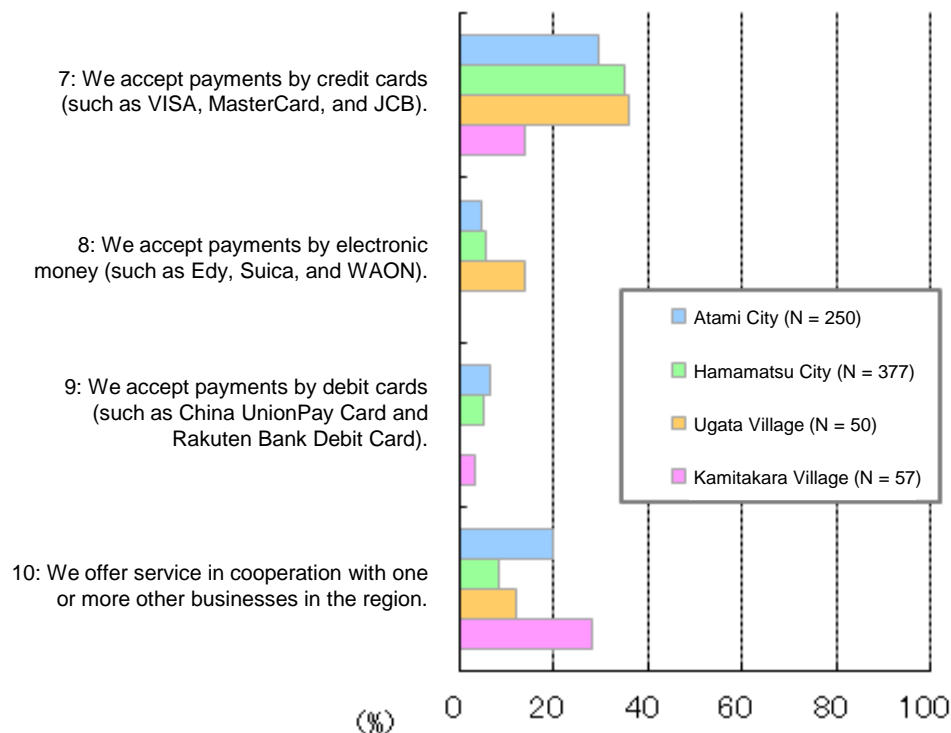
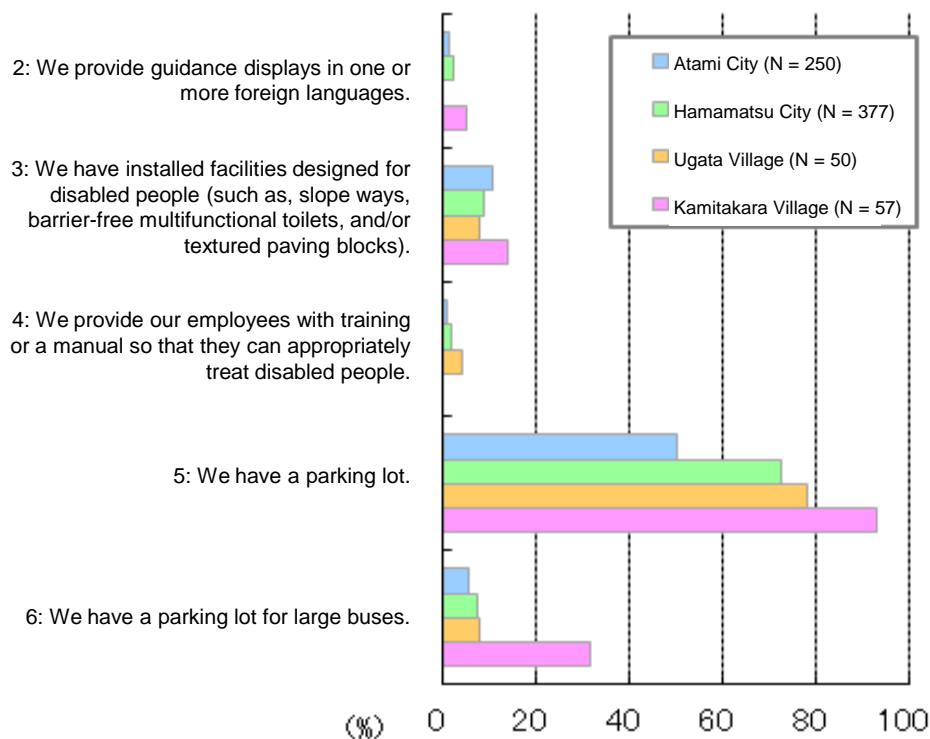
	Total	Average
Sales (10 thousand yen)	514,712	17,749
Sales cost (10 thousand yen)	101,910	4,431
Selling expenses and general administrative expenses (10 thousand yen)	262,416	11,928
Purchasing and material cost (10 thousand yen)	95,818	4,563
Outsourcing cost (10 thousand yen)	2,624	656
Sales commission (10 thousand yen)	28,899	2,627
Advertising expenses (10 thousand yen)	8,103	477
Employee training cost (10 thousand yen)	138	23

- The ratio of tourism industry business entities that participate in the tourism association is 34.0% in Atami City, 4.2% in Hamamatsu City, 40.0% in Ugata Village, and 82.5% in Kamitakara Village (these ratios are relative to the number of all respondents).



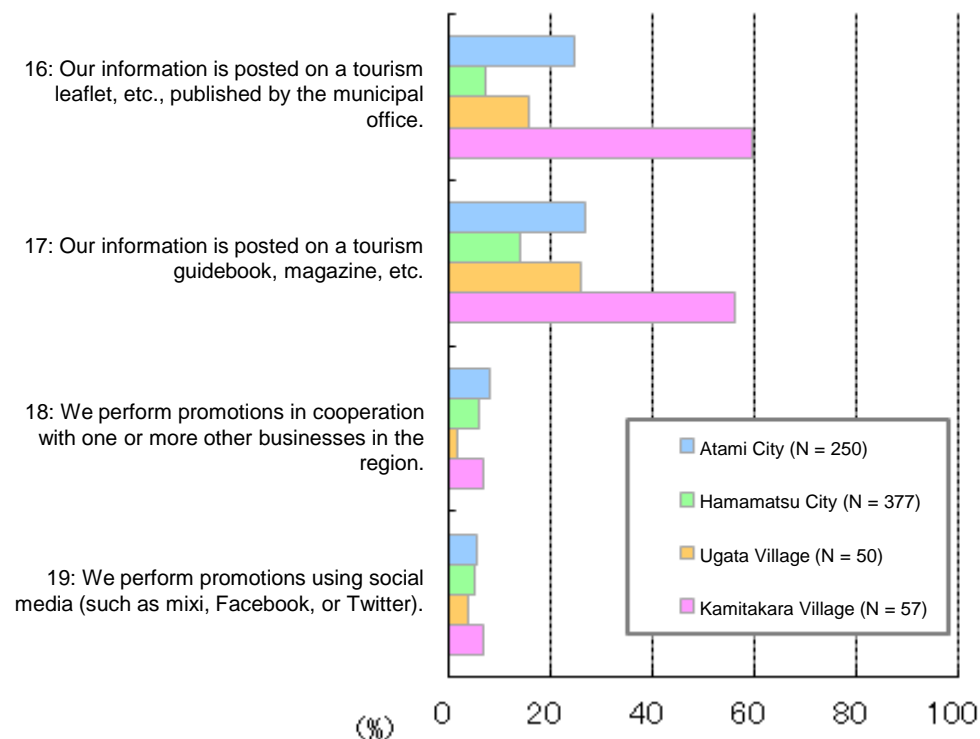
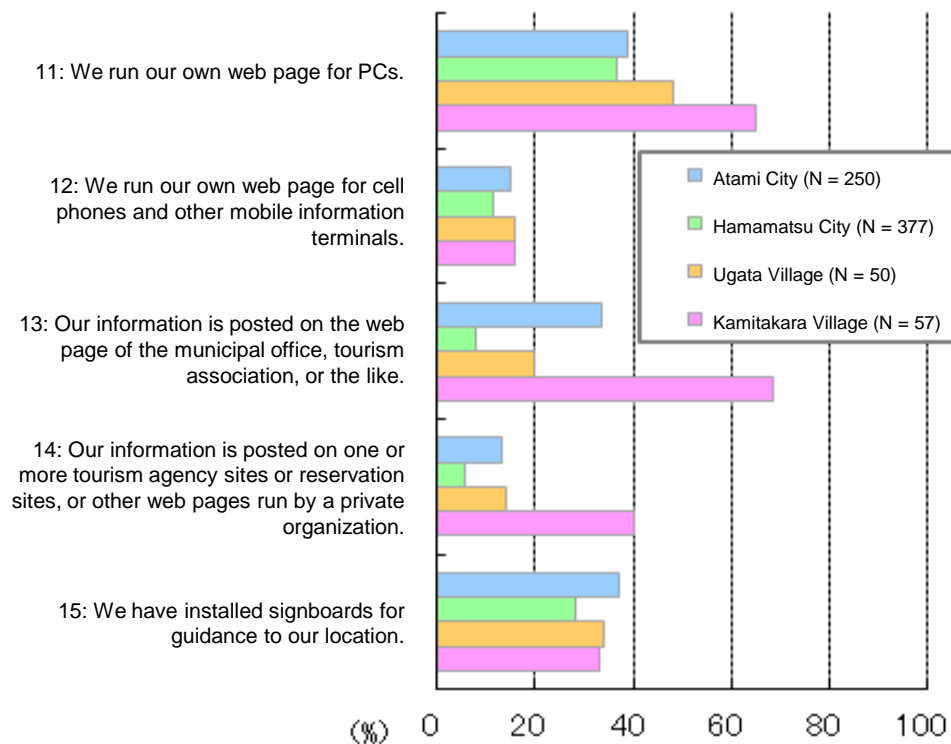
Specific efforts [service provision status]

- As a whole, efforts for "2. Guidance display in foreign languages" are slow.
- The percentage of the answer "7. We accept payments by credit cards" is the highest in Ugata Village, but it is still smaller than 40%.
- Relatively few business entities answered "16. We have a parking lot for large buses."

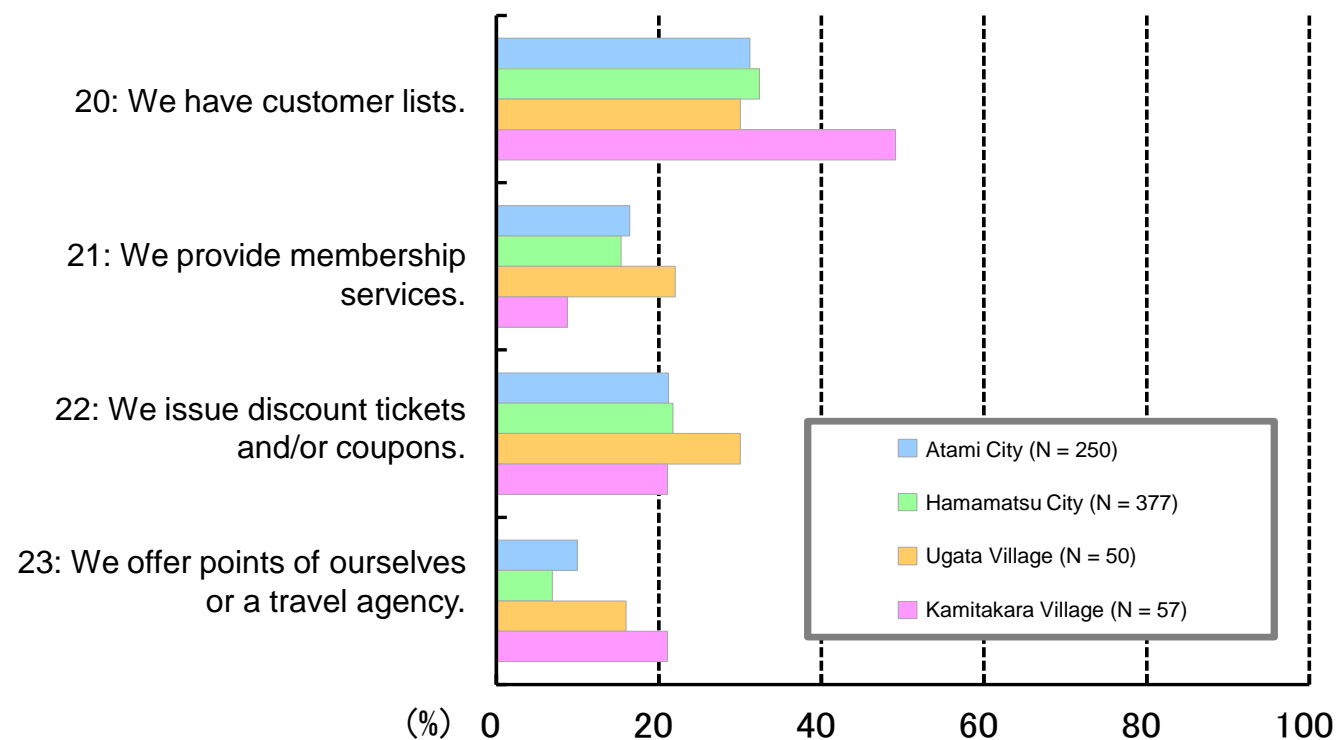


Specific efforts [implementation of advertising activities]

- In all regions, the ratios of business entities that returned a positive answer to "12. Running of a web page for mobile terminals" and "19. Use of social media" are relatively low.
- Kamitakara Village (where the ratio of business entities that participate in the tourism association is high) seems to have advanced in the use of IT and other media, as is evident from the high percentages of positive answers to "11. Running of a web page," "13. Information on web pages of related organizations," "14. Use of other businesses' web pages," "16. Information on municipal leaflets," and "17. Information on guidebooks, magazines, etc."



- A noteworthy point in Kamitakara Village is that about 50% of the answers to "20. Creation of customer lists" are Yes.
- Regarding other marketing activities, all regions still have much to do in the future.



Sales breakdown into different customer types and sales styles

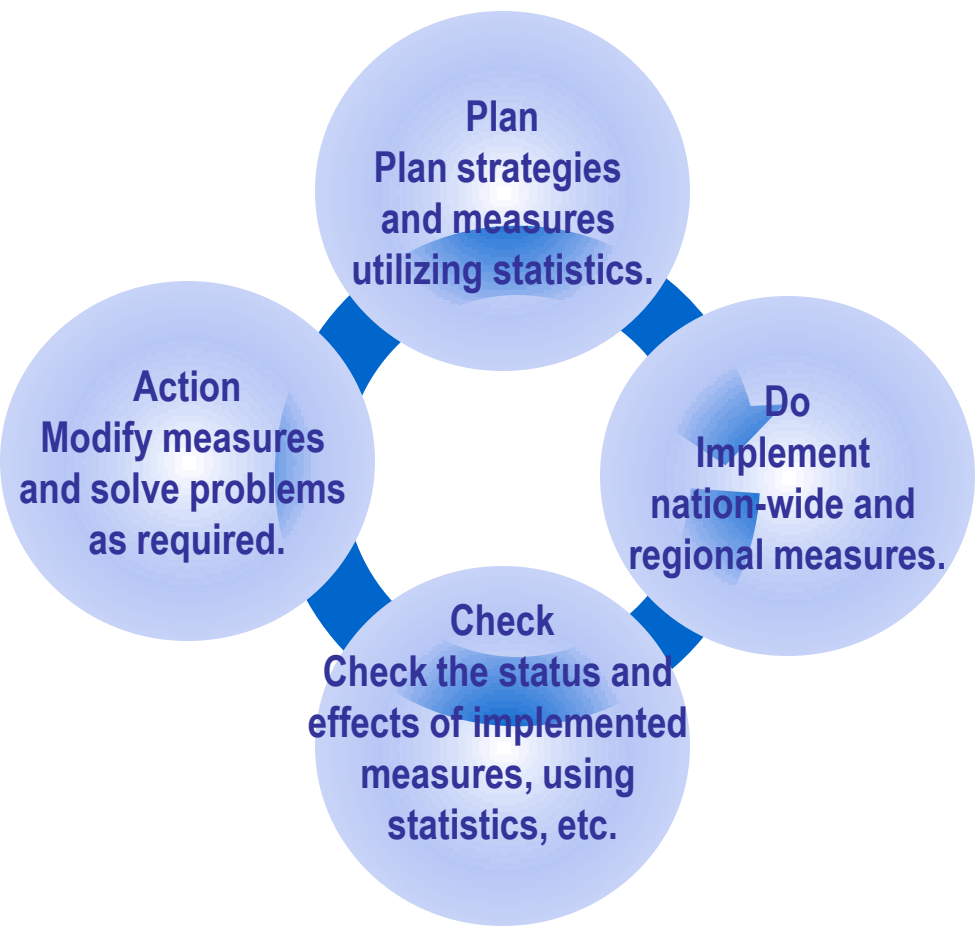
- In Hamamatsu City, **business and other organizational customers represent at least two-thirds**. In other regions, the ratio of personal customers is higher. Especially, in Ugata Village, personal customers represent 100%.
- **Nearly all sales to personal customers in Ugata Village are direct sales**. In Atami City, the percentage of direct sales is about 80% (= $65.2 / (65.2 + 19.4)$). In Kamitakara Village, direct sales and commission sales are fifty-fifty.

Representative region		Personal tourists [direct sales]	Businesses and other organizations	Businesses and other organizations
Region category II: Atami City (currently Atami City)	Sales breakdown	65.2%	19.4%	3.9%
Region category II: Hamamatsu City (currently Hamamatsu City)	Sales breakdown	26.0%	7.0%	67.0%
Region category III: Ugata Village (currently Shima City)	Sales breakdown	97.3%	2.7%	0.0%
Region category III: Kamitakara Village (currently Takayama City)	Sales breakdown	43.4%	47.3%	3.1%

9. Future efforts that make use of tourism statistics

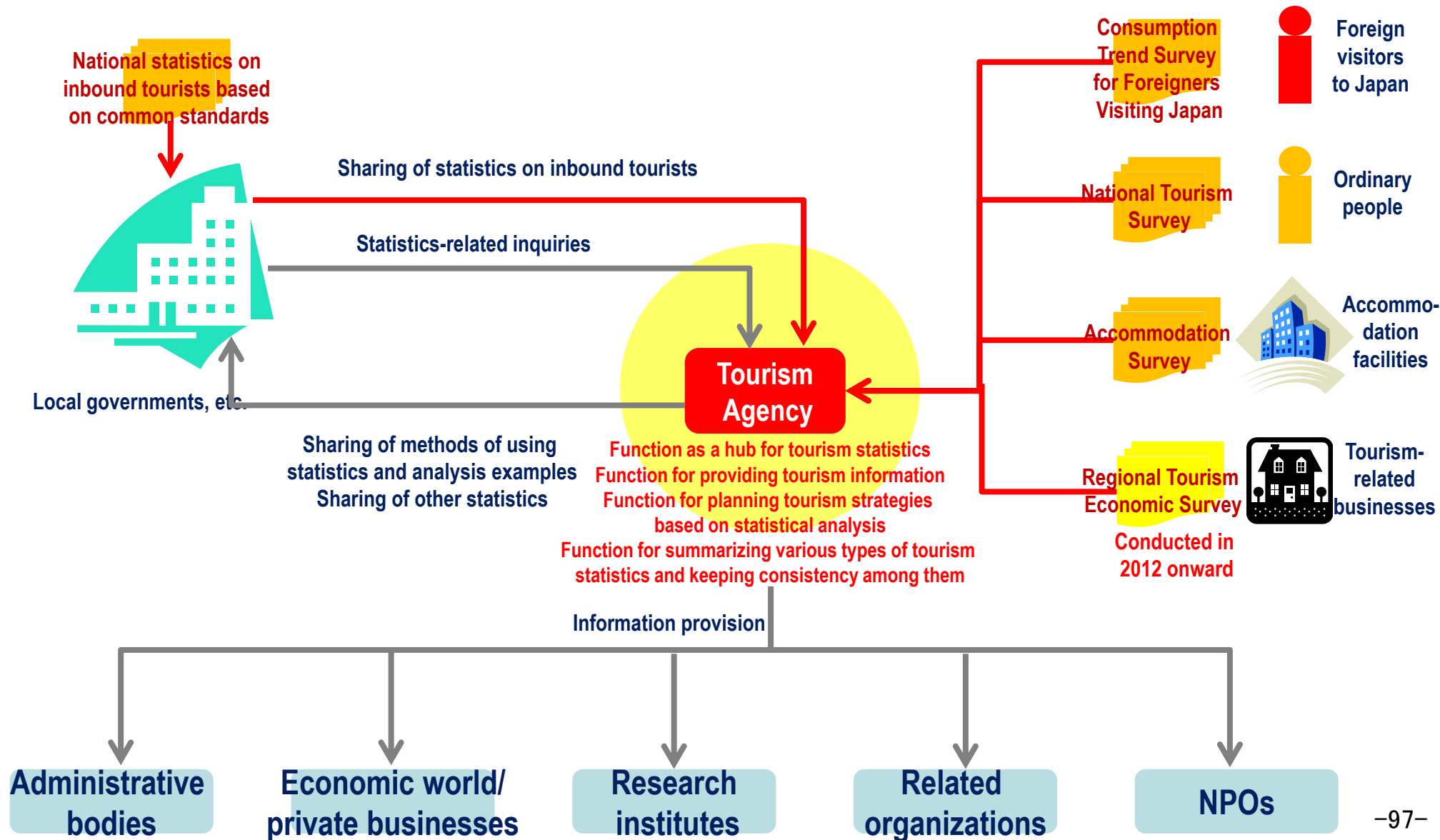
Supporting local governments in promoting their autonomous efforts to utilize statistics.

- Using the regional tourism economic survey and existing tourism statistics, **develop regional tourism measures and growth strategies.**
- Develop a **PDCA-cycle framework** to assure effective and autonomous implementation of various measures.



	Tourism Agency	Local governments, etc.
Plan	<ul style="list-style-type: none"> Plan growth strategies and tourism strategies, using statistics. Provide analysis frames for local governments, etc. 	<ul style="list-style-type: none"> Plan regional tourism promotion measures, using statistics.
Do	<ul style="list-style-type: none"> Implement planned tourism measures. 	<ul style="list-style-type: none"> Implement planned measures.
Check	<ul style="list-style-type: none"> Check the effects of measures using statistics. Provide analysis frames for checking the effects of measures. 	<ul style="list-style-type: none"> Check the status of implemented measures.
Action	<ul style="list-style-type: none"> Modify strategies and/or measures and solve problems as required. Verify the probability of what may result from modifications to measures, based on statistics. 	<ul style="list-style-type: none"> Modify strategies and/or measures and solve problems as required.

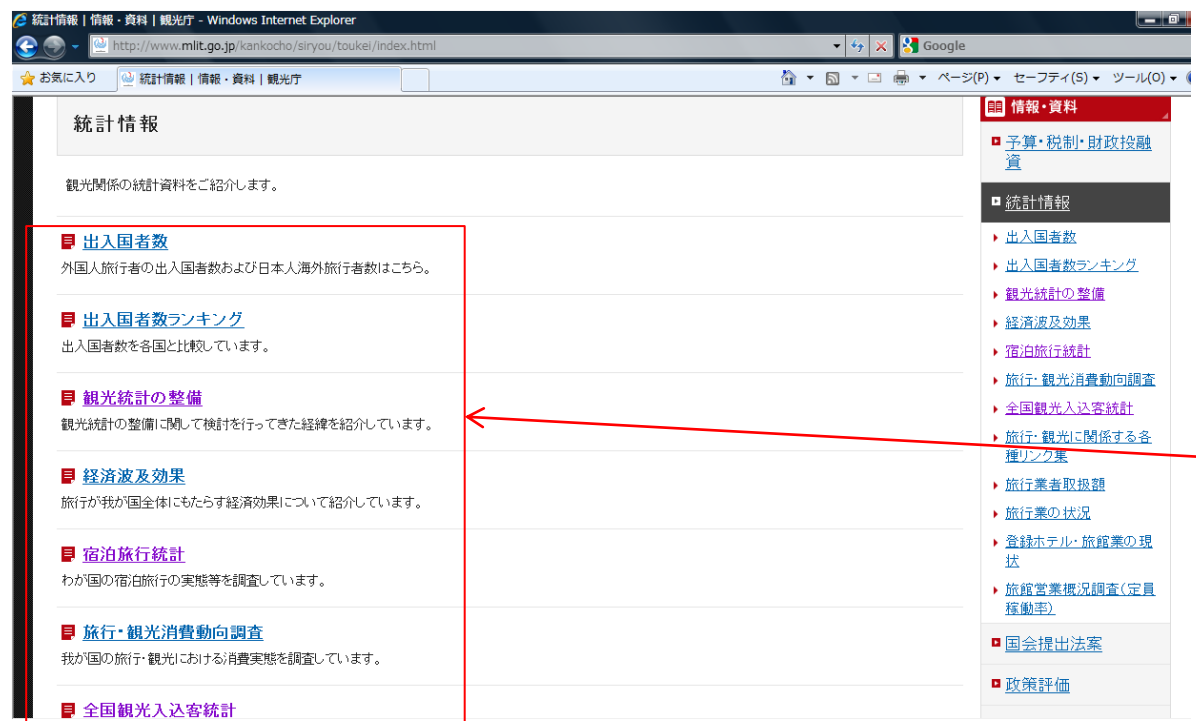
- The **Tourism Agency** should, **acting as a hub**, **provide** individual stakeholders with **tourism statistics and information obtained thereby**.



[Reference] Use of Tourism Statistics

<To use published data (tourism statistics provided by Tourism Agency) for analysis>

Access the Tourism Agency web page, and select Information/Reference > Statistical Information (<https://www.mlit.go.jp/kankocho/en/siryoutoukei/index.html>).



For each type of statistical information, time-series data is provided. Click the link to the statistical information you want to use.

<In addition to published data, individual questionnaire data is also available if the specified conditions are fulfilled (Articles 32 and 33 of the Statistics Act)>

○Articles 32 and 33 (secondary use and provision of questionnaire information) of the Statistics Act

[Purposes]

- When producing statistics or conducting statistical research
- When preparing lists of names to be used for surveys for producing statistics

[Range of users]

- Administrative bodies
- Local governments
- Independent administrative agencies, etc. (including national university corporations and inter-university research institutes)



These organizations can use the individual questionnaire data for their commissioned or joint researches.