

Special Session: Tourism Statistics: the European and the Asian cases

The Asian situation on tourism expenditure statistics

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Japan Tourism Agency

The objective of this speech and this session



Joseph Rudyard Kipling, born in the 19th century, said,
"Oh, East is East, and West is West, and never the two shall meet"

In the end of 20th century, a Korean video artist, Nam June Paik produced art using communication satellite with the aim of uniting the East and West, and he said,
"Bye-Bye Kipling"

In the 21st century,
global tourism continues to develop precisely to realize **"Bye-Bye Kipling"**.

Tourism statistics is the key to a deeper grasp of the actual situation of tourism.

This speech refers to the actual situation of tourism statistics (expenditure statistics) in the East (Asia).

Moreover, this session aims for a further development of tourism statistics by uniting the East and West.



UNWTO “International Recommendations for Tourism Statistics 2008”

Tourism

Tourism refers to the activity of visitors, who are travelers taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or places visited.



The phrase, “Tourism refers to the activity of visitors” shows that tourism is defined from the demand side.



UNWTO “International Recommendations for Tourism Statistics 2008”

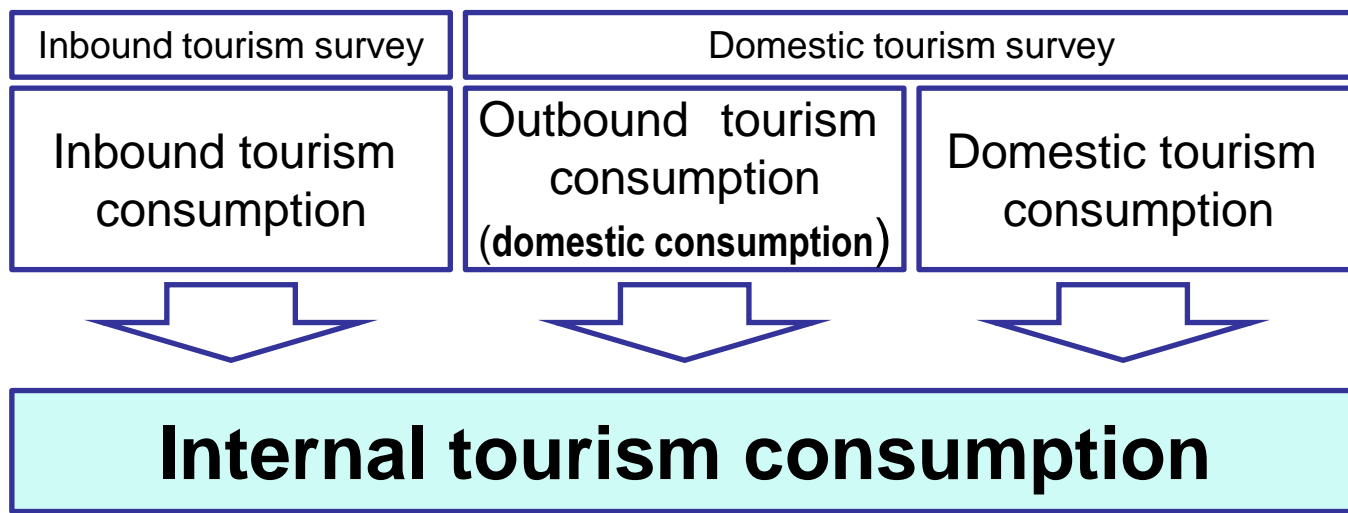
Tourism expenditure

Tourism expenditure refers to the amount paid for the acquisition of consumption goods and services, as well as valuables, for own use or give away, for and during tourism trips. It includes expenditures by visitors themselves, as well as expenses that are paid for or reimbursed by others.

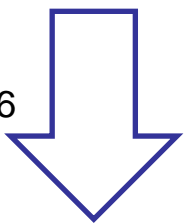
Due to the characteristics of tourism, grasping the economic scale of tourism from the demand side is easier than from the supply side. Therefore, statistical surveys targeting households or individuals will be proper.



If the internal tourism consumption can be grasped, the tourism share of total GDP and the economic ripple effect of tourism can be estimated.

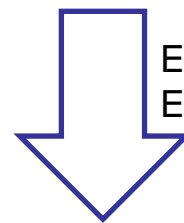


Example1:
Compilation of TSA table 6



Tourism GDP
- Tourism share of total GDP

Example2:
Estimation by the Input-Output table



Economic ripple effect
- Induced domestic production
- Induced gross value added
- Induced employment

Example 1: Grasping tourism GDP throughout compilation of TSA



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Table 6

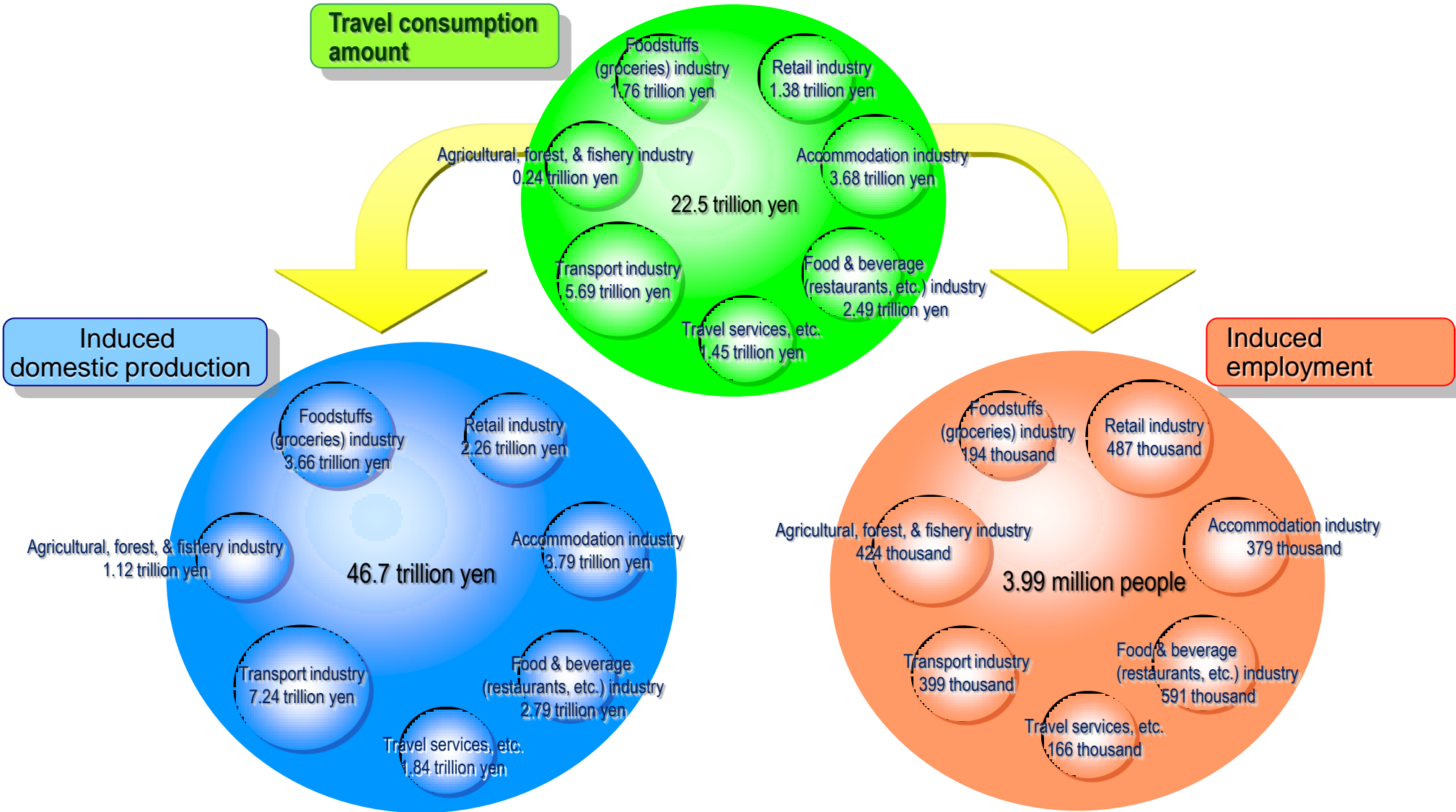
(Billion Yen)

Products	Tourism industries				TOTAL tourism industries	Other industries	TOTAL output in services	TOTAL output in goods (at producers' price)	Imports	Tariffs and taxes on imports	Margins	Internal tourism consumption
	Hotels and similar	Restaurants and similar	Transport and similar	Sporting and other recreational services								
Specific products	4,083	2,419	6,468	348	13,318	1,561	14,878	3,757	862	115	2,442	22,054
Characteristic products	4,083	2,419	6,468	295	13,265	1,459	14,724	205	53	3	8	14,993
Accommodation services	4,059	5	1	7	4,072	15	4,087	0	0	0	0	4,087
Food and beverage serving services	23	2,414	0	5	2,441	47	2,489	0	0	0	0	2,489
Passenger transport services	0	0	6,174	1	6,175	518	6,692	0	0	0	0	6,692
Travel agency, tour operator and tourist guide services	0	0	261	0	261	175	437	0	0	0	0	437
Cultural services	0	0	0	37	37	236	273	0	0	0	0	273
Recreation and other entertainment services	1	0	0	217	218	230	448	0	0	0	0	448
Miscellaneous tourism services	0	0	32	29	62	237	299	205	53	3	8	568
Connected products	0	0	0	53	53	102	155	3,552	808	112	2,434	7,061
Non specific products	1	1	2	2	6	1,788	1,794	13	0	0	-1,377	430
TOTAL output	4,084	2,420	6,470	349	13,324	3,349	16,672	3,769	862	115	1,065	22,484
Agriculture, forestry and fishery products	143	146	1	2	292	47	339					
Ores and minerals	0	0	4	0	4	115	120					
Electricity, gas and water	260	97	233	12	602	64	666					
Manufacturing	705	932	1,206	32	2,875	890	3,766					
Construction work and construction	37	6	101	4	148	25	173					
Trade services, restaurants and hotel services	0	0	0	0	0	3	3					
Transport, storage and communication services	137	49	692	18	896	138	1,034					
Others services	313	163	862	53	1,391	384	1,775					
Government services, private non-profit services to households	14	10	142	1	167	10	177					
Total intermediate consumption (at purchasers price)	1,609	1,404	3,241	121	6,376	1,676	8,052					
Consumption of fixed capital	621	174	1,422	49	2,266	316	2,582					
Compensation of employees	690	359	1,827	99	2,976	970	3,945					
Other taxes less subsidies on production and imports	202	85	297	45	630	121	751					
Gross Operating surplus and Gross Mixed income	962	398	(318)	35	1,077	266	1,342					
Total gross value added of activities (at producers' prices)	2,475	1,016	3,228	228	6,948	1,673	8,621					

Tourism GDP

Example 2: Economic effect of tourism on industries in Japan

(2012)



◆ Induced domestic production
 Induced domestic production is defined as an effect that is induced over all industries 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 income of employees of the suppliers, thereby purchasing new production over all industries. Such consequential effects are included in the induced domestic production.)

Source: Japan Tourism Agency "Research study on economic impacts of tourism in Japan, 2012"

We conducted a questionnaire survey about tourism expenditure statistical survey.

Target Countries

Brunei, Cambodia, Indonesia, Korea, Lao PDR, Malaysia, Myanmar, Singapore, Thailand, Philippines and Japan

Survey Items

- Development status of the primary tourism statistics
 - Domestic tourism expenditure
 - Inbound tourism expenditure
 - Number of accommodation guests
- TSA related items in addition

Statistical survey regarding domestic tourism expenditure



Statistics on domestic tourism expenditure have not been developed in about half of the countries. Surveys are conducted in quarterly or shorter in most conducting countries.

Statistical survey regarding domestic tourism expenditure

	Brunei	Cambodia	Indonesia	Japan	Korea	Lao PDR	Malaysia	Myanmar	Philippines	Singapore	Thailand
1	√ : Conducted : Not Conducted		√	√	√		√		√		√
2	A : Annually M : Monthly Q : Quarterly O : Other		Q	Q,M	M,O		M		O		Q
3	Sample size		6,700	25,000	2,394		30,472		12,500		200,000
4	Number of Sectors		17	46	9		6		11		7
5	M : Mail W : Website (Online) T : Telephone I : Interview O : Other		I	M	M,I		O		O		I

Statistical survey regarding inbound tourism expenditure

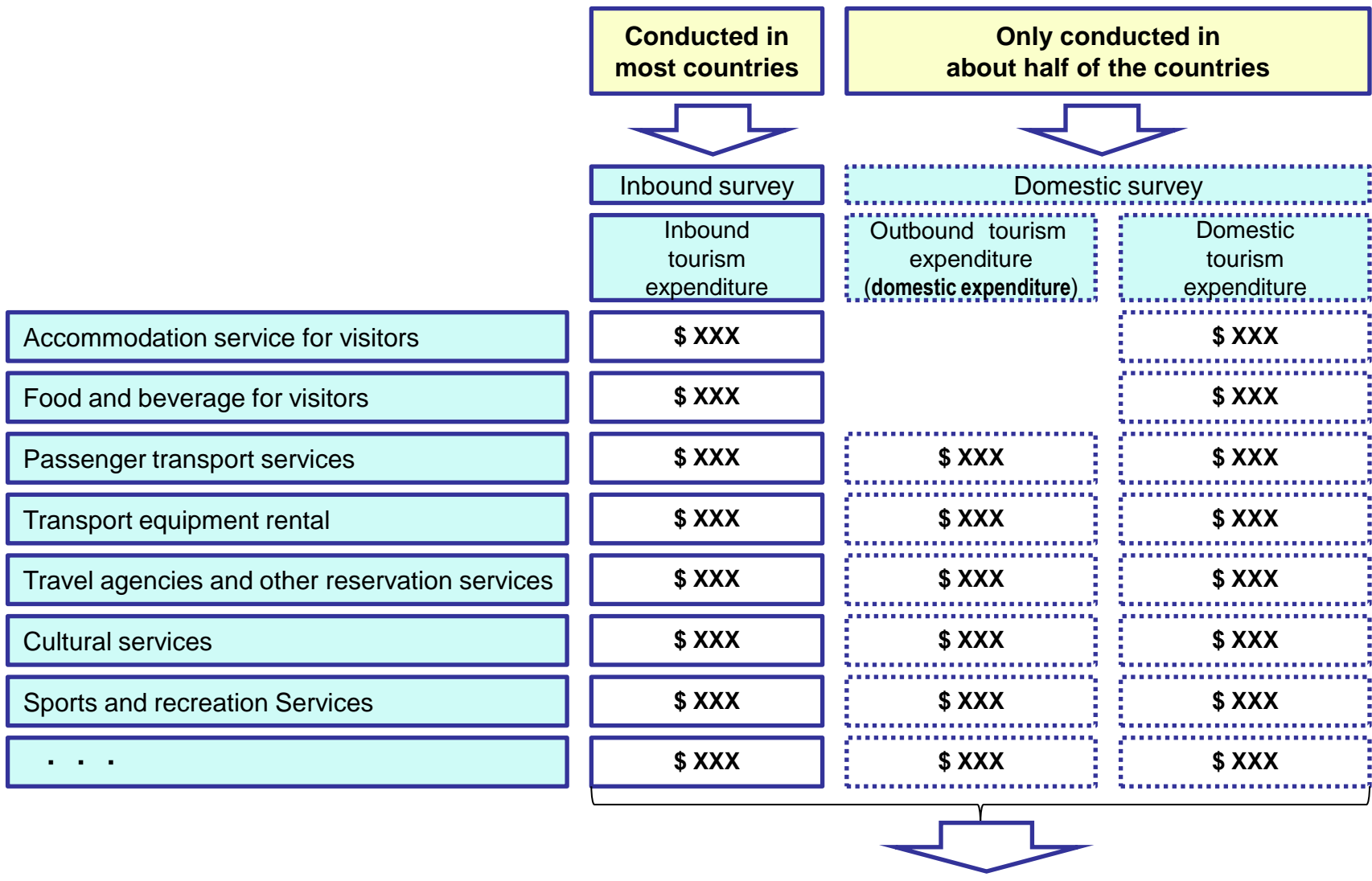


Although there are differences in cycles and sample size, most countries conduct statistical surveys on inbound tourism expenditure by interviewing.

Statistical survey regarding inbound tourism expenditure

	Brunei	Cambodia	Indonesia	Japan	Korea	Lao PDR	Malaysia	Myanmar	Philippines	Singapore	Thailand
1	√:Conducted : Not Conducted	√	√	√	√	√	√	√	√	√	√
2	Cycle A:Annually M:Monthly Q:Quarterly O:Other	A	O	Q	M	A	O	A	M	Q	Q
3	Sample size	5,000	16,600 in 2013	26,400 Per year	10,056	3,200	50,000	250	8,000 in 2013	22,600	40,000
4	Number of Sectors	5	13	20	9	6	5	6	18	5	7
5	Survey Method M : Mail W : Website (Online) T : Telephone I : Interview O : Other	I	I	I	I	I	I	I	I	I	I

Current status on the development of tourism expenditure statistics in the Asian countries responding to this questionnaire



Since about half of the countries have not developed, they cannot grasp tourism contribute to their macroeconomy.

- Obstacles in terms of budget and technology should be removed and the entity that enables domestic surveys is expected to be organized.

- If such entity cannot be developed, alternative methods such as the expansion of other existing statistics should be considered.
 - Expansion of the Household Survey
 - Would it be possible to conduct a detailed survey on items related to tourism? (accommodation, air transport, rental car, etc.)

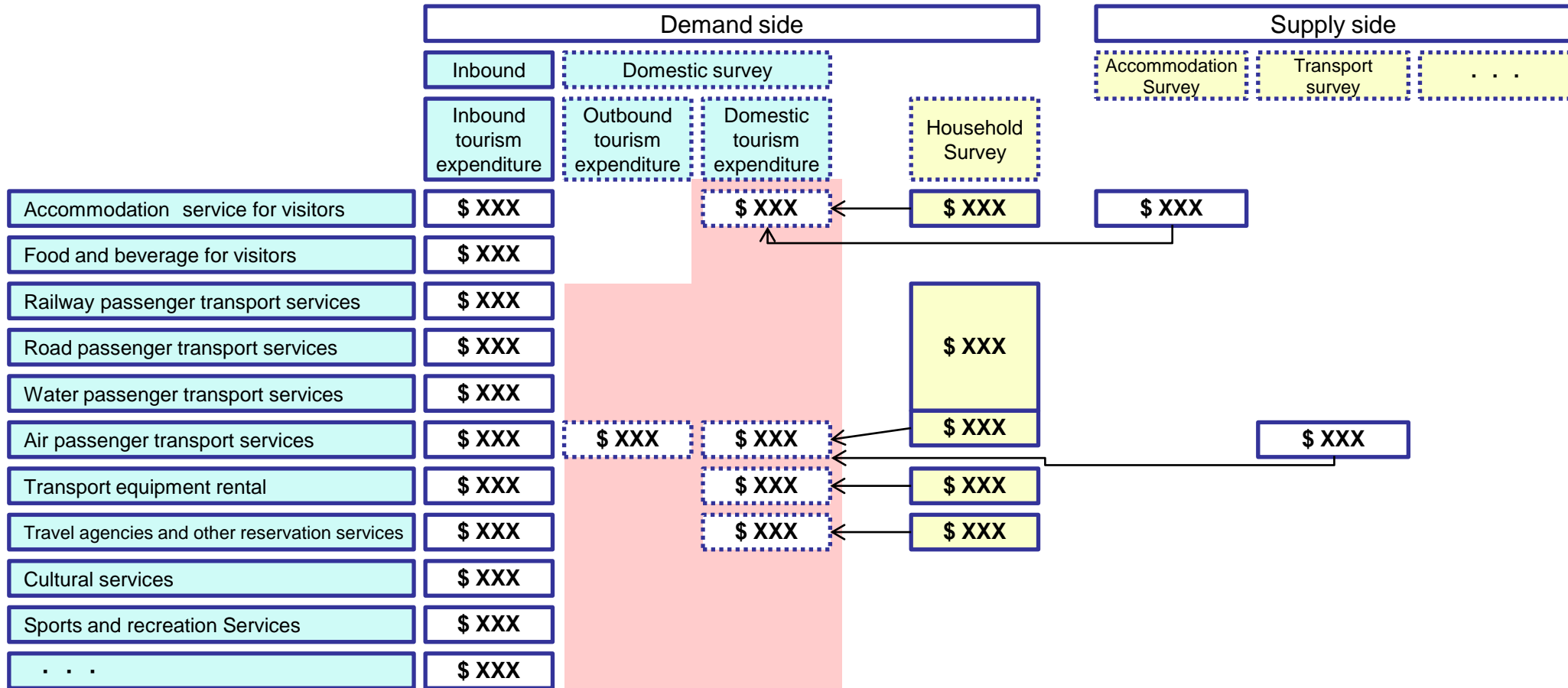
 - Utilization of the supply side statistics
 - Accommodation statistics
 - Transportation statistics, etc.

- However, there are still limitations. (see the next page)

Reference) Ideas of alternative methods



- As alternatives for a domestic survey when it cannot be conducted, the unobtainable items can be supplemented partially utilizing the Household Survey.
- However, not all the unobtainable items can be fully covered.



Unobtainable items due to not conducted a domestic survey.

Development status of primary tourism statistics



Statistics on accommodation have not been developed in about half of the countries responding. Some of them obtain the amount data from the accommodation survey.

Statistical survey regarding the number of accommodation guests at accommodation establishments

		Brunei	Cambodia	Indonesia	Japan	Korea	Lao PDR	Malaysia	Myanmar	Philippines	Singapore	Thailand
1	✓ : Conducted : Not Conducted			✓	✓	✓		✓	✓			✓
2	A : Annually M : Monthly Q : Quarterly O : Other			M	M,Q	A		A,Q	A			M
3	Sample size			5,768 *	18,000 per year	561		3,129	20			10,000
4	Amount data					✓		✓	✓			
5	M : Mail W : Website (Online) T : Telephone I : Interview O : Other			O	M,W	M		M,W, O	M			I

* In 2013, a month: 1,767 star hotels and 4,001 non-star hotels



Let's work together
to realize **“Bye-bye Kipling”**

Thank you for your attention