



“TSA and complementary analytical tools
for decision making both at national and
sub-national levels”

**Reporting Japan’s progress,
assessment and challenges**

Session V: Measuring the Economic Contributions of Tourism: from the
TSA to Alternative Modeling Techniques 16:00-17:30 31-March-2009

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 Japan Tourism Agency  **ROSEN COLLEGE** Hospitality Management
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The Keynote Message

- “Clarifying and Extending the TSA Brand”
by Dr. Doug Frechtling
 - **Misrepresentation**
 - Overstated “Panacea” of CGE (self-claimed)
 - Mixed up with generic I-O/SAM based impact modeling framework
 - **Misappropriation**
 - Wrong assertion about simulated TSA
 - TSA accounts, Not models tourism activities
 - Easy modeling exaggerates “estimates” of tourism
 - Tourism offices versus National Statistics Offices

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Sub-national TSA guidelines at UNWTO Malaga (in the Keynote)

Summary of the Keynote points...

1. Must have national TSA established
2. Employ account information
3. Incorporate ten tourism characteristic products and industries
4. Produce Internal Tourism Expenditure, Internal Tourism Consumption, Tourism Gross Regional Product, and Tourism Employment
5. Generates five of the TSA tables (4,5,6,7,10)
6. Generate Internal Tourism Consumption, GVA of tourism industry, Tourism Direct GVA, Tourism Gross Regional Product

Using the Keynote as benchmark to assess Japanese efforts

- 1: “Must have national TSA established”
 - Japanese (Ministry of Land, Infrastructure, Transport: MLIT) has made annual tourism research since 2000 in conformity with TSA guidelines.
 - 7th version (year 2006) has
 - Tourism GDP, Tourism Employment, internal tourism consumption, pre/during/post tourism expenditures by day trip, overnight trip, outbound
 - Derived from on 59 sectors national I-O, 6,600 samples for tourism expenditures

Using the Keynote as benchmark to assess Japanese efforts

- 1: “Must have national TSA established” V, YES
 - Why not many people knew about it?
 - **Published in Japanese only**, no internet dissemination
 - Strength in Japan
 - All 47 sub-regions have I-O tables
 - Tens of regional cities publish their own I-O tables
 - In all, approximately 100 I-O tables exist in Japan
 - National TSA Not in complete format yet
 - Ex: lack of Table 6, 10 etc

Regional Tourism Data in Japan

- Some sub-national regions claim their development of tourism industry statistics
 - Some mention “TSA-based data”
 - **Did they develop sub-national TSA?**
- Using the keynote components as checklist, we will evaluate them regarding how close they are to the perfect definition of “Sub-national TSA” by criteria of Dr. Frechtling

Regional Tourism Measurement



Sub-National TSA in Japan?

Table: Assessment of Regional Tourism Economy Research in Japan - Regional TSA?

Requirements suggested by Dr. Frechtling/ name of regions	Shizuoka.P	Aomori.P	Okinawa.P	Yamaguchi.C	Niseko.T
Employ account information	O	O	?	O	X
Incorporate ten tourism characteristic products and industries	O	O	?	O	X
Produce:					
Internal Tourism Expenditure	O	O	O	O	Δ
Internal Tourism Consumption	O	O	O	O	Δ
Tourism Gross Regional Product	O	O	O	O	Δ
Tourism Employment	O	O	O	O	Δ
Generate TSA tables of					
4: Internal tourism consumption by products and types	O	O	?	O	X
5: Product accounts of tourism industries and other ind.	O	O	?	O	X
6: Total domestic supply and internal tourism consumption	X	X	?	X	X
7: Employment in the tourism industries	O	O	?	O	Δ
10: Non-monetary indicators	Δ	Δ	?	X	Δ
Generate:					
Internal Tourism Consumption	Δ	O	O	O	Δ
GVA of Tourism Industry	O	O	O	O	Δ
Tourism Direct GVA	O	O	O	Δ	Δ
Tourism Gross Regional Product	O	O	O	Δ	Δ
Impact Modeling?	O	O	O	O	Δ
Following TSA sequences?	X	X	X	X	X
Prime data collection?	O	O	O	O	O
English available?	X	X	O	X	X
Comments					
	mkting paper		mkting paper	MRIO, CO2	I-O simul.

Source: made by the author



Sub-National TSAs in Japan

ASSESSMENT (subjective one by author, not by JTA)

- Thanks to advanced I-O infrastructure, researchers are familiar with I-O based modeling for decades in Japan
- Researcher learn how TSAs are made, and calculate key data along the TSA guidelines (such as Tourism GRP, GVA)
 - **But not shown in TSA complied format yet**
- Prime data collections appear to be well-structured

Future Direction of Sub-national TSAs in Japan



High level Interests in TSAs

- UNWTO Regional Support Office and Japan Tourism Agency sponsored 2nd International Symposium on Tourism Economy (TSA) on 3/10/2009
- 250+ participants came to learn about TSA and sub-national TSA ([Mr. Stanley Fleetwood](#))
 - Underscores needs for technical workshop?
- I predict additional specific knowledge on TSA will enable sub-national municipalities to generate SN-TSA in near future

Challenges for Japan

- Many capable I-O modelers → They may be tempted to run model to generate “simulated TSA”
 - Needs good technical guidance on TSA as accounting tool, not as another modeling technique
- Better Dissemination
 - In English, at more conference, more publications, usage of internet to exchange ideas with global researchers
- Reason for Hope
 - JTA was established in October 2008

Thank you very much. Tad Hara, on behalf of JTA

