

# Domestic Tourism Statistics

March.2012

Japan Tourism Agency



国土交通省

観光庁

Japan Tourism Agency Ministry of Land, Infrastructure, Transport and Tourism

## Major official statistics on tourism



### Japan Tourism Agency

- National Tourism Survey (General Statistics)**  
...No particular change in outbound statistics from last WS.
- Accommodation Survey (General Statistics)**  
...Planning to cover camping parks, etc. as "Other" Category.
- Statistics on Inbound Tourists by Prefecture**  
...Began listing of Fukuoka City (City designated by government ordinance).
- Regional Tourism Economic Survey**  
...Full Scale Survey Starting 2012 following 2011 Pilot Survey v. 2.
- Consumption Trend Survey for Foreigners Visiting Japan**  
...No particular changes.
- Status of Handling by Major Travel Agents**  
...Monthly surveys on gross sales, theme-travel plans, etc. gathered by JTA.

### Others

- Number of Inbound Tourists**  
...Monthly release by the Japan National Tourism Organization (JNTO).
- Number of Japanese Tourists Who Travel Abroad**  
...Announced monthly by JNTO.
- Survey on Status of Ryokan(Japanese-style inn) Operation**  
...Japan Ryokan and Hotel Association survey of operational conditions, capacity utilization rates, prices, etc.
- Surveys by various Prefectural governments**  
...Surveys conducted by Prefectural governments.

※Red : Domestic Tourism Statistics

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# 1. National Tourism Survey

## Outline of National Tourism Survey

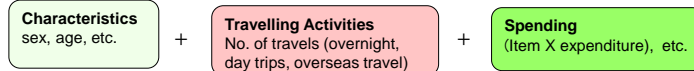
### Survey Design

For the purpose of gathering basic information in establishing national policies on tourism and estimation and analyses of economic ripple-effects, National Tourism Survey is conducted.

### Outline

This survey is conducted in order to understand the actual status of domestic and overseas travels, their costs and other related matters. The survey covers about 25,000 people each year. Data so obtained are used as basis of estimating the national spending on travel/tourism as well as for compilation of TSA.

- ◆ Survey Cycle: Quarterly
- ◆ Sampling: Japanese citizens extracted randomly out of the Basic Resident Register
- ◆ Survey Method: Mail Survey.
- ◆ No of Reps: 50,000 (25, 000 X 2)
- ◆ Survey Items:



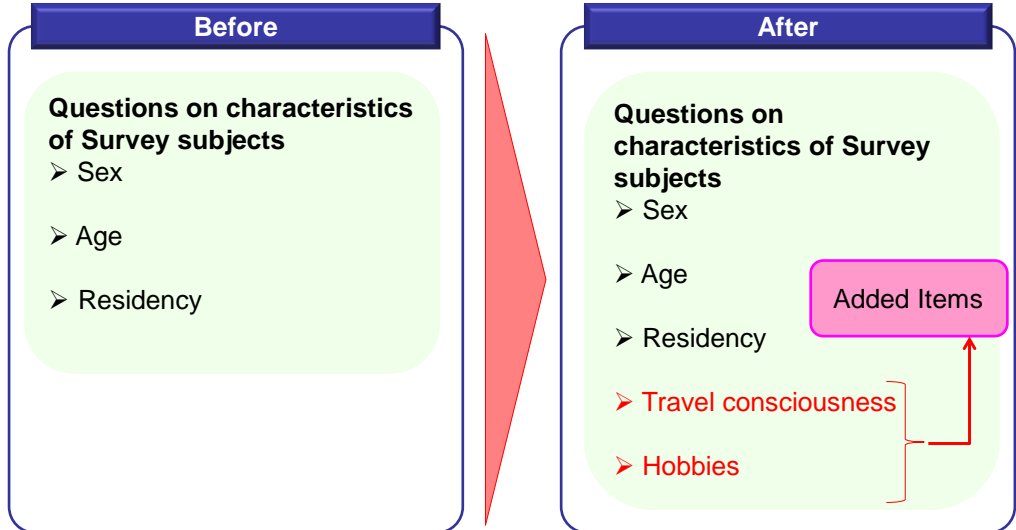
### Utilization

- By analysis of itemized list of travel/tourism expenditure, annual average number of trips and purpose of them, and average number of nights spent in accommodation facilities would give an accurate picture of Japanese travelers.
- Compilation of the Tourism Satellite Accounts (TSA) recommended by UNWTO allow for calculation of the productivity of the travel/tourism industry and value-added aspects of international comparison.

## Major Changes Since the Last WS (July 2011 workshop)



- A variety of aspects of the subjects became analyzable by addition of these items while only travel expenditures were analyzed prior to the change.



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## Future Improvement of Survey Design



- Two items below are considered to be added as questions to questionnaire.
  - Overall satisfaction of travel
  - Intention to re-visit
- Addition of these question to the questionnaire would enable understanding of the valuation of respondents' satisfaction on the Prefectural level and intentions of revisits. We could know the valuation of respondents' satisfaction at the level of visitor characteristics (sex/age, level of spending, etc.) and strength of their intentions for re-visits.

### Added questions

Q. How well were you been satisfied by the place you visited overall? Please circle only one answer.

Overnight Trip	Very Satisfied	Satisfied	Somewhat Satisfied	I am not sure	Somewhat Dissatisfied	Dissatisfied	Very Dissatisfied
		7	6	5	4	3	2
Day Trip	Very Satisfied	Satisfied	Somewhat Satisfied	I am not sure	Somewhat Dissatisfied	Dissatisfied	Very Dissatisfied
		7	6	5	4	3	2

Q. Would you consider coming back to the place within one year? Please circle only one.

Overnight Trip	Very Much so	I Would	Perhaps I might	I am not sure	Not very much	Perhaps not	Not at all
		7	6	5	4	3	2
Day Trip	Very Much so	I Would	Perhaps I might	I am not sure	Not very much	Perhaps not	Not at all
		7	6	5	4	3	2

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## Meanings of the Newly Added Characteristics Items



### Consciousness about Travels

Q: Select the item that is closest to your idea of traveling.

1. Traveling is the most important hobby of mine.
2. I would like to travel only when I have enough time and money.
3. I would travel when family or friends invite me to go with them but not on my own volition.
4. I am not particularly interested in traveling.

### Hobby

Q: What are your hobbies?

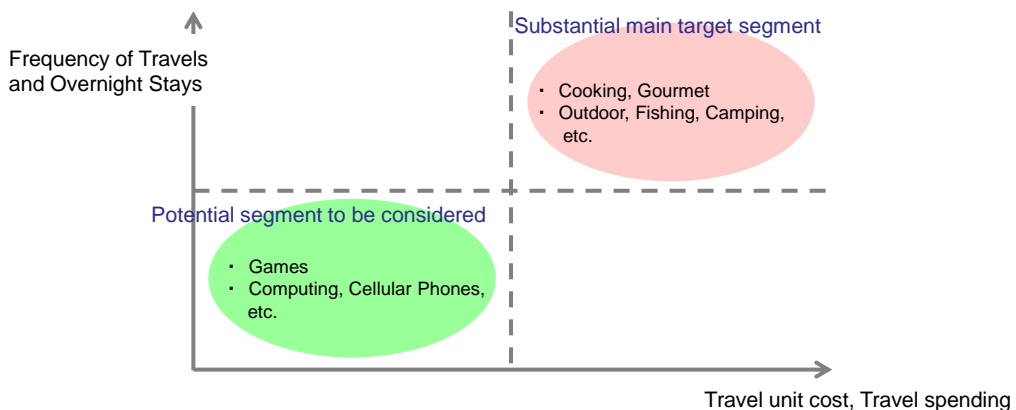
1. Cooking/gourmet
2. Fashion
3. Sports and fitness
4. Outdoor activities, fishing, camping
5. Massage, facial aesthetics
6. Computers, cellular phone, smart phone
7. Games
8. Movies appreciation
9. Music appreciation
10. Art appreciation
11. Theatric dramas
12. Driving, automobiles
13. Gardening
14. Learning artistic skills
15. Gambling
16. Domestic traveling
17. Overseas travels
18. Reading
19. Other
20. Nothing in particular

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## Reference: Process of Analysis of Visitor Characteristics



- Analysis of visitor characteristics would clarify correlation between "frequency of traveling with high-spending" and "hobbies".
- Such knowledge could be used to plan a new tour pack that would attract travelers of other segments who are interested in the same hobbies as the frequently traveling high-spenders.
- Likewise, identify "hobbies" of low correlation with "travel frequency and high-spending, we could utilize this information to vitalize the traveling of the group of travelers with same "hobbies".



## 2. Accommodation Survey

### Summary of Accommodation Survey

The Accommodation Survey is conducted to clarify conditions of overnight domestic travels(Since 2007).

#### Survey Design

##### Target Accommodations Facilities

Hotels, Inns, casual accommodations, etc.

##### Survey Cycle

Quarterly (1<sup>st</sup>, 2<sup>nd</sup>, 3<sup>rd</sup> and 4<sup>th</sup>)

##### Survey Method

Mail Survey

##### Survey Content

##### Basic Data

Type, No. of rooms, etc.

**Main Data** (Japanese & foreign) No. of guests, Residence (foreigner, nationality), etc.

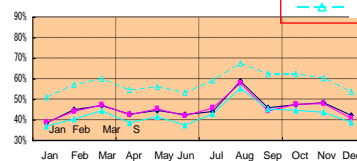
#### Sampling Method

No. of Employees	No. of Samples	Selection Rate
Over 10	Approx. 10,000	All
5 - 9	Approx. 10,000	1/3
0 - 4	Approx. 30,000	1/9

#### Utilization

- For development of appropriate regional policies on tourism and policy effect assessment
  - To be used to achieve proper redistribution of resources based on current data.
  - In case of natural disasters, to estimate adverse effects of the disaster, rumors, etc. on the local tourism industry; clarification of rippling-effect on regional economy.
- Vitalization of business activities
  - Development planning based on demand, Effective investment planning

Fluctuations in Employee and Room Utilization Rates (Jan 2007 – Dec 2009)



## Considerations on Survey Results on “Miscellaneous Accommodations”



- We currently have no data on camping sites, “Accompanied Accommodations”, Internet cafés, personal automobile, etc.
- Regarding to the diversification of life styles, we are considering to expand the target coverage to camping sites.
- Final decision is made after the consideration of factors indicated in the scheme presented below .

Type of facility	Do list of facilities available?	Do No. of rooms & employees specifiable?	Can utilization rate be calculated?	Can Survey reliability be expected?	Propriety of coverage
Camping Site					
Companion Accommodation.					
Internet cafe (Manga café)					
Automobile					

※ Pictograms above is hypothetical.



### 3. Statistics on Inbound Tourists by Prefecture (Statistics on Inbound domestic and foreign Tourists by Prefecture)

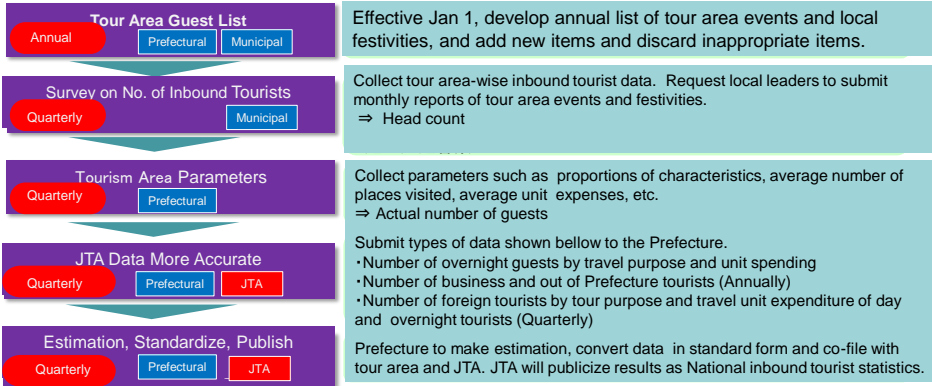
# Summary of Statistics on Inbound Tourists by Prefecture



## Purpose

To establish objective and reliable statistics of inbound tourists based on the "common standard for inbound tourist standard" in data collection of the number of Prefectural tourism areas, travel unit spending and travel expenditure.

## Survey Method



## Results

- Permits inter-Prefectural comparison of status of tourism (no. of inbound tourists, travel unit spending, travel spending).
- Available as bases to strategize tourism,, determine its direction, select focal areas and other processes.
- By adding its own survey terms in addition to standard items, Prefectures will be able to grasp other parameters such as data on municipal level or select tourist areas within their Prefectural bounds.

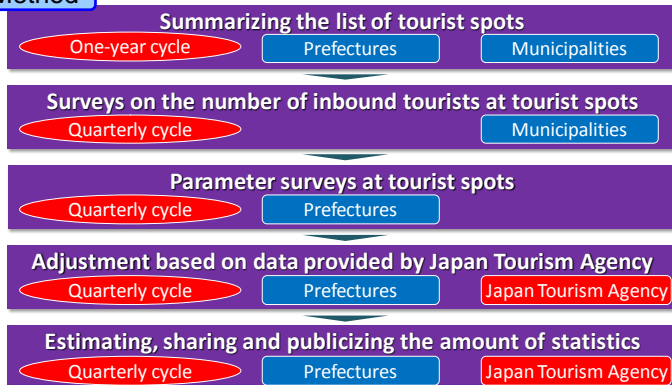
# Summary of Statistics on Inbound Tourists by Prefecture



## Purpose

To establish objective and reliable statistics of inbound tourists based on the "common standard for inbound tourist standard" in data collection of the number of Prefectural tourism areas, travel unit spending and travel expenditure.

## Survey Method



## Results

- Inter-Prefectural comparison of status of tourism is available(no. of inbound tourists, travel unit spending, travel spending).
- By adding its own survey terms in addition to standard items, Prefectures will be able to grasp other parameters such as data on municipal level or select tourist areas within their Prefectural bounds.

## Status of Statistics on Inbound Tourists Based on Common Standards



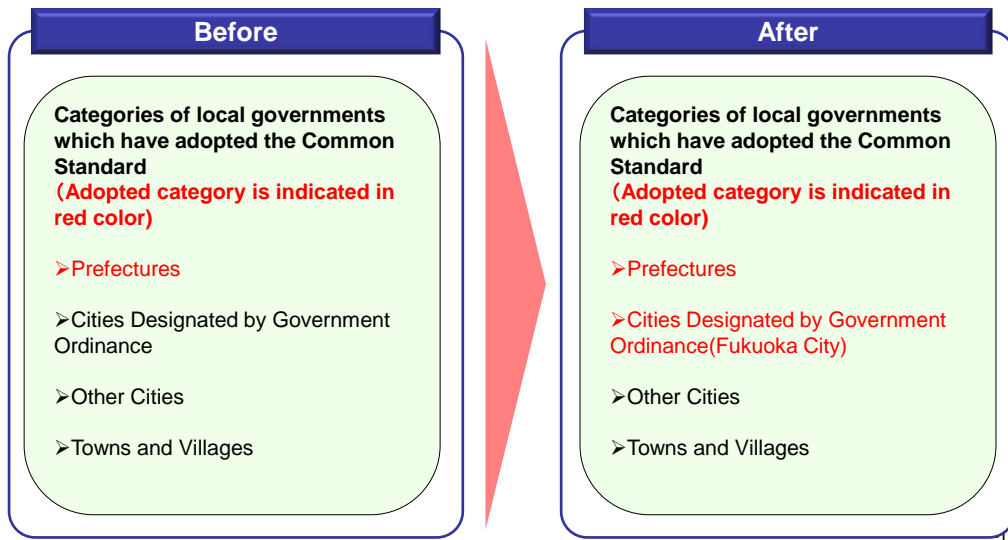
- ... Adopted from April-June 2010
- ... Adopted from October-December 2010
- ... Adopted from January-March 2011
- ... Not adopted yet



## Major Changes from the Past WS (July 2011)



■ Of 47 Prefectures, 45 have adopted the Common Standard and Fukuoka City has also adopted (Kitakyushu City is planning to adopt).





## 4. Regional Tourism Economic Survey

### Summary of Regional Tourism Economic Survey

#### Purpose

Regional Tourism Survey is conducted from a viewpoint of entities X money to correct basic data of tourism industry.

#### Planned Survey Method\*

##### ◆Survey Cycle

Once in 5 years (concurrent with the Economic Census of Internal Affairs Ministry)

##### ◆Survey Method

Mail Survey

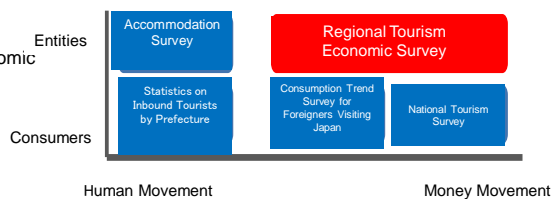
##### ◆Sample Size

Approx. 160,000 entities

##### ◆Survey Contents

Number of operators, sales scale, employment, Industry's tourism proportion, regional economic ripple-effect, etc.

\* In process of determining survey method: new survey method will be launched in 2012 on the basis of one on trial in 2011.



#### Effects

- Enables acquisition of basic data on the tourism area level
- Makes it possible to understand local tourism economy easier

# Uniqueness of Regional Tourism Economic Survey

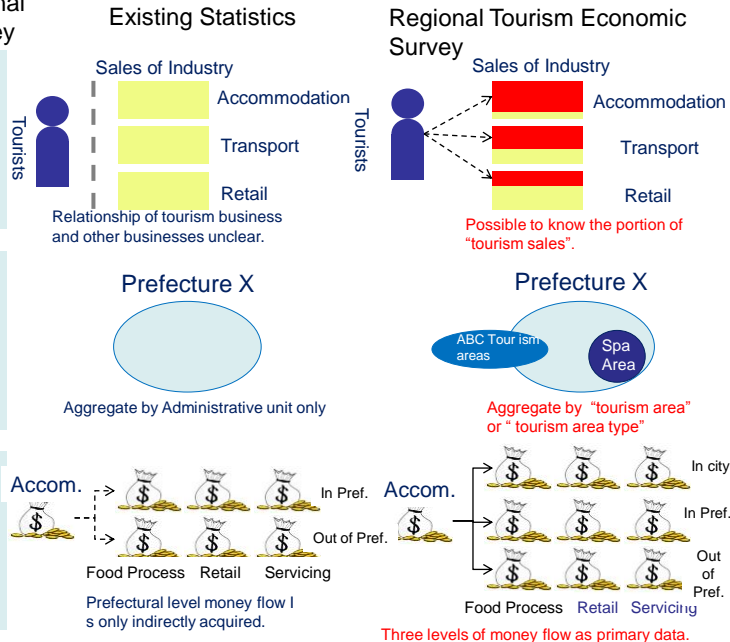


## Characteristics of Regional Tourism Economic Survey

The only Survey that could know a portion of sales by 'tourism' account.

The only Survey that could aggregate data by "tourism area" or "tourism area type" bases.

The only Survey that directly connects movements of money to the economy of outside (intra-city, intra-Pref., extra-Prefect.).



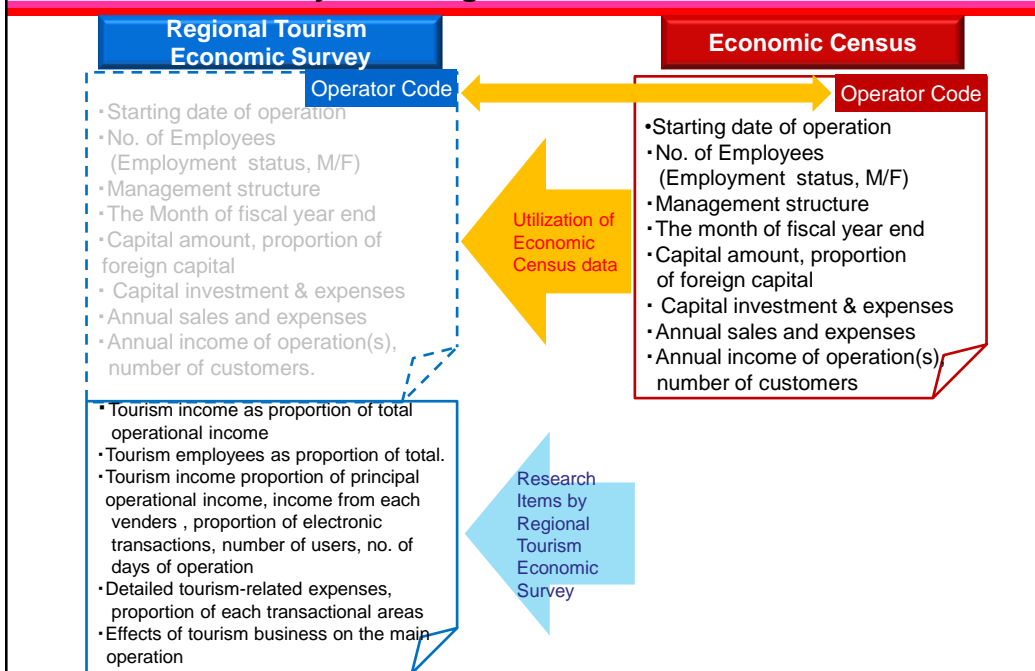
# Major Changes from the Past WS (July 2011)



On the basis of 2010 trial survey and 2011 trial survey ver. 2., the finalized Survey will be started in July, 2012, linked to the once-5-year "Economic Census" of conducted by the Statistics Bureau, Ministry of Internal Affairs.

Trial Survey (Nov 2010)	Trial Survey ver. 2 (Nov 2011)	Finalized Survey (Jul 2012)
<p><b>Assessment of Survey method.</b></p> <ul style="list-style-type: none"> <li>Target area of trial survey: 13</li> <li>Number of target operations: Approx. 3,000</li> </ul>	<p><b>Survey conducted as pre-finalized form and assessed survey method and other elements of the survey.</b></p> <ul style="list-style-type: none"> <li>Target districts of trial survey: 112</li> <li>Number of target operations: Approx. 50,000</li> </ul>	<p><b>Expected to start the Survey on July.</b></p> <ul style="list-style-type: none"> <li>Target districts of trial survey: Nation-wide (about 500)</li> <li>Number of target operations: 160,000</li> <li>Survey cycle: Expected to be same as Economic Census (once every 5 years)</li> </ul>

# The Finalized Survey will merge the Data of the Economic Census



## Japan. Endless Discovery.

# Thank you for your attention.