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Mongolia and Tourism in North – East Asia

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ABSTRACT

One of the tourism development indicators is the statistical flow of tourist destinations and the number of tourists. During this time of economic cooperation in Northeast Asia, statistics on tourist flows between China, Korea, Japan, and Mongolia were collected from multiple sources of the internet and compared the flow balance. Tourist traffic balance is positive in Mongolia-China direction, negative in Mongolia-Japan direction and positive in Mongolia-Korea direction. In general, Mongolia's tourist flows have a deficit.

Keywords: Tourism Development, Travel and Tourism Competitiveness, Economic Impact of Tourist Flows, Mongolia, Tourism Flow Balance.

INTRODUCTION:

For Mongolia, integration and active participation in the North-east Asian network is considered as a way to accelerate social and economic development of the country. One of main intersections of the Mongolian developmental agenda, which was initiated in 2013 in Ulaanbaatar under the name “National initiative” and the North-east Asian Regional Economic Cooperation Network is development of the tourism industry. Geographic locations of North-East Asian countries, in this case of Mongolia, create prerequisites to become an inbound and outbound hub of tourism flows. Therefore, trans-regional tourism flows from and to different countries through Mongolia have not only major national impacts but also economic impacts on the entire North-East Asian region. Recently, cooperation mechanisms have initiated and formed between China and Japan and South Korea, between China and Russia. However, most possibly due to historical and political reasons, development and cooperation of the tourism industries is still slow between South Korea, Mongolia and other countries of North-east Asia (Zhang, 2011).

TOURISM DEVELOPMENT IN MONGOLIA:

Mongolia’s foreign trade export markets were limited to those of the former Council for Mutual Economic Assistance CMEA member countries under the dominance of the former Soviet Union (FSU) (ADB, 2008). Mongolia currently trades with more than 120 countries and has bilateral trade, economic cooperation and investment promotion agreements with more than 30 countries, including Russia, China, the ROK and Japan (Enkhbayar & Tomoyoshi, 2013). The policies towards the tourism management has been affected by the regular changes introduced by the newly formed government. In the initial years after political transition to the democracy, the tourism sector policies had been interlinked to infrastructure, transportation, environment, culture, sports, green development, but interestingly had not been directly connected to economic growth of the country. In Mongolia, ambitions goals of reaching 1 million of tourists by 2015, and over 3 million by 2021 are also set (ADB, 2008). To Ulaanbaatar alone, for example,

it is aimed to reach 2 million tourists in 2020, which is expected result in tourism's impact on economy, particularly it will contribute to the capital grow from 9.8 to 20% (UB, 2014), which is two times the current state. The targeted programs designed to reduce cost of tourism related services and increase export revenues will be developed to attract the flow of tourists to Mongolia.
According to the ranking of countries based on the Environmental Performance Index, Mongolia stands at 83 among 180 countries (EPI, 2018). In 2017, according to the Travel & Tourism Competitiveness Report (WEF, 2017), Mongolia ranks 102th globally among 136 counties and 18th regionally among 22 countries (Table 1).

Table 1: The Travel & Tourism Competitiveness Index 2017 (136 countries) (WEF, 2017)

Criteria	China	Japan	ROK	Mongolia
Business Environment	92	20	44	72
Environmental sustainability	132	45	63	127
Safety and security	95	26	37	50
Health and hygiene	67	17	20	50
Prioritization of Travel & Tourism	50	18	63	102
Air transport infrastructure	24	18	27	95
Ground and Port Infrastructure	44	10	17	123
Tourist Service Infrastructure	92	29	50	111
ICT Readiness	64	10	8	85
Price competitiveness	38	94	88	15
Human resources and Labor Market	25	20	43	80
International Openness	72	10	14	125
Natural resources	5	26	114	79
Cultural Resources and Business Travel	1	4	12	62
Overall rank	15	4	19	102
Asia Pacific Regional rank/22	4	1	6	18

TOURIST FLOWS IN THE NORTH-EAST ASIAN REGION:

One of main indicators of regional integration is flow and rate of tourists and international trade. Culture flows through tourism, which in the longer term influences economic and national decision making (Ignatieva, 2013). Tourism is also in many ways past of ongoing geopolitics, therefore should be tackled with consideration of macro contexts.
During 2000-2013, the number of arriving international tourists to Asia and the Pacific region has increased from 16.4 % to 23.0 %. North-East Asia International Tourist Arrivals in Asia and the Pacific fluctuated between 52.9-50.8 %, and remains quite stable. In 2000, 2013 overall International Tourist Arrivals has increased by 1.6 times, while north-East Asia Arrivals increased by 2.2 times, and Asia and the Pacific Arrivals 2.3 by times respectively.
In 1995 – 2012 (WBI, 2012) Global, East Asia and Pacificregion, Japanese, Korean Arrivals, departures ratiohas remained as 1.0:1.01-2.3, while for China Arrivals, departures ratio changed from 4.4:1.0 to 1.0:1.4. This indicates the changes in NAF tourism destinations. As of today, the concept of new economy has emerged, and it creates foundations for the overall economic development (Table 2).

Table 2: Tourism Economic Indicators 2018 (WTTC, Travel & Tourism Economic Impact 2018, 2019)

Countries	China	Japan	ROK	Mongolia
Travel And Tourism Total Contribution To GDP (US$ IN BN (REAL PRICES))	1.44 K	337.65	74.12	1.27
Travel And Tourism Total Contribution To Employment (THOUSANDS OF JOBS)	82.44 K	4.19 K	1.43 K	123.73
Visitor Exports (Foreign Spending) (US$ IN BN (REAL PRICES))	125.98	36.76	17.94	0.47
International Tourism, Expenditures (Current US$) (VALUE) (2016)	13.45	18.56 B	5.76	379 M
Capital Investment In Travel And Tourism (US$ IN BN (REAL PRICES))	164.32	37.27	11.38	0.69
Domestic Tourism Spending (US$ IN BN (REAL PRICES))	906.28	186.37	50.68	0.19
Government spending on travel and Tourism service (US$ IN BN (REAL PRICES))	9.81	5.38	0.84	0.01

China:

In 2017, China received 181.8 million of arriving Asian tourists, particularly from Mongolia 1.86 million, which makes Mongolia as 3th top ranking Asian country out of 10 countries. While the number of tourist from Japan increased by 3.6 % (2.58 million in 2016), and from Mongolia 17.9 % (1.58 million in 2016), and in contrast the number of Korean tourists has decreased by 19.1 % (4.77 million in 2016). In 2017, China received 139.4 million overseas visitors, and out of them 20.9 % (29.1 million) were foreign tourists (NBSC, 2018). There were 0.14 million tourists arriving from China to Mongolia and this equal to 30.4% of international tourists to Mongolia. In the past 2017, total revenue reached 475 billion USD, up about 21.9% over 2012. Domestic tourism revenue was 423.6 billion USD, increased by 15.7% compared with 2012; inbound tourism revenue topped 51.7 billion USD, up 3.3% (Sazykin, 2006). Out of total Chinese inbound tourists 3.91% compose Mongolians, this flow generates USD 20.1 million by Mongolian tourists only. This compose 4.8% of total China's tourism sector revenues. In 2011, the China Tourist everage expenditure was USD 700 – 928 (Sazykin, 2006). This statistics show the average daily per capita expenditure by overseas tourists in China in 2012, by region of stay. In 2012, an international tourist on average spent around USD 204 per night in Tianjin (Statista, 2019). In 2013, 26.29 million of international tourists visited China. The number of tourists has decreased, particularly by 2.48% from Korea, by 18.21 % from Japan, by 9.89% from Russia respectively. While, the visitors from Mongolia has increased by 3.91%. In 2013, travel agencies helped 33,557,091 people to travel overseas. In 2017, the China direct contribution of travel & tourism to GDP in CNY 2,719.2bn (3.3% of GDP) and supported 28,250,000 jobs including jobs indirectly supported by the industry was 10.3% of total employment (79,900,000 jobs) (WTTC, Travel & Tourism Economic Impact 2018, CHINA, 2018).

Japan:

In 2010, 16.6 million people traveled abroad, and 8.6 million tourists arrived from overseas (Tomohiko, 2013) [14]. In 2012, 17,000 Japanese visited Mongolia, one-20th the number of Chinese visitors. In 2013, there were 18751 passengers arraived to Mongolia from Japan (NSO, Mongolian Statistical Yearbook 2013, 2014). Out of them 18178 were tourists, which composed 4.2% of total international tourists.

The main purpose of Japanese tourists to Korea is leisure, while the Koreans visit Japan for leisure, business, visting relatives and friends mainly. In 2010, the tourists from Japan composed 34,4% of Korean market, and 21,3% (Katrishenko, 2012) belongs to Chinese tourists. North-East Asia (+7%) where major destinations such as Japan and the Republic of Korea registered double-digit growth (UNWTO, World Tourism Barometer 2014, 2014). In 2011, Japan Tourist average expenditure was USD 1441. In 2017, the Japan direct contribution of travel & tourism to GDP in JPY 12,043.2bn (USD107.4bn) and supported 1,098,500 jobs including jobs indirectly supported by the industry was 6.4% of total employment (4,171,500 jobs) (WTTC, Travel & Tourism Economic Impact 2018, JAPAN, 2018).

Korea:
In 2011, 12.7 million of Korean visited the foreign countries as tourists, and spent USD 14992.1 million. In contrast 9794.8 million people travelled to Korea and spent USD 12693.7 million, which resulted in deficit of USD 2744.4million (SBJ, Japan Statistical Yearbook 2013, 2013). The average daily expenditures for tourists in Seoul - including the cost of accommodation and meals - totaled about 1.41 million won ($1,315). Taiwanese tourists spent the most money, followed by the Chinese. Japanese travelers ranked third (Park, 2014). In 2011, ROK Tourist average expenditure was USD 1172 (UNWTO, Tourism Highlights 2014 Edition, 2014). The robust development of tourism in Korea can be associated with rapid expansion of financial sector and technological «know-how», and Confucianismsystem which creates united ethnological, cultural, educational specifics, employment, living habits, and loyalty (Suslin, 2002). Currently, in Korea the investment in tourism development per capita is ten times higher compared to Russia, and low cost for transportation services due to extensive transport networks, and rapid development of SMEs in tourism industry are the major contributing factors for rapid expansion of national tourism. In 2017, the South Korea direct contribution of travel & tourism to GDP in KRW 27,571.4bn (USD24.3bn) and supported 548,500 jobs including jobs indirectly supported by the industry was 5.3% of total employment (1,417,500 jobs) (WTTC, Travel & Tourism Economic Impact 2018, SOUTH KOREA, 2018).

Mongolia:
Prior the economic stagnation, the number of expats and international tourists visiting Mongolia between 1971 and 1996 (GM, 1998) increased from 1140 to 112020 (increased by 98.26 times), from 171 to 16803 (increased by 98.26 times) respectively. In just 42 years since 1971, the registered number of foreign visitors reached 7.5 million, 56% of which, 4.2 million people, were official tourists. The peak of this extensive tourism flow is an improved better recording and registration of the travellers between 1999-2005 and 2006-2013, when ratio of tourists among the total foreign passengers in and out of Mongolia was 16.7-22.9 percent and 73.0-98.5 percent respectively (NSO, Mongolian Statistical Yearbook 2013, 2014). Mongolia is an attractive tourist destination due to its wider territory almost equaled to the size of Western Europe, location between Russia and China, and population of 3 million, rich natural resources under and above the ground, nomadic culture and un-occupied land. To show the scale of the aimed goal, in 2006, Mongolia had received 386000 tourists and made total profits of 261 million USD, which represents 12.9% of total profets from exports. While in the same year, 212000 tourists have travelled abroad, with costs equalling to 11.3% (WB, 2019) of total imports. In the last 8 years, number of Mongolian tourists going abroad had increased along with increases in the expenditure of tourists; between 2005 and 2013, the expenditure increase was accounted to reach 3.1 times the baseline, by 2013, averaging at 1622 USD per tourist (MB, Mongolian citizens traveling abroad Expenditure Survey. NTC, UBTD, 2014). In 2013, the net-profit of the sector was negative 448.3 million USD, while by 2014, 417000 tourists had entered the country, creating 271 million USD of profit (Margad, 2015), outnumbered by tourists going out of the country, which have created a negative 622 million USD (MB, Mongolian Foreign Sector Review, 2013) net-profit. In 2011, Mongolia Tourists' average expenditure was USD 883 (UNWTO, Tourism Highlights 2014 Edition, 2014). In 2011-2014, the balance of payments of tourism was USD 314.4-357.4 million in deficit (MB, Mongolian Foreign Sector Review, 2013). The major reason of such deficit increase was decline in tourism service revenue decline by 29% and reached USD 69.5 million; and its expenditure decreased by 11% and reached USD 95.1 million. Moreover, other services revenue decreased by 15% and reached USD 74.0 million (MB, Mongolian Foreign Sector Review, 2013). In 2010-2013, the service balance deficit has increased 5 times (MB, Balance of Payments Statistics 2010., 2011).
In 2017, the Mongolia direct contribution of travel & tourism to GDP in MNT 804.8bn (USD330.5mn) and supported 34,000 jobs including jobs indirectly supported by the industry was 10.4% of total employment (121,500 jobs) (WTTC, Travel & Tourism Economic Impact 2018, MONGOLIA, 2018). The number of tourists visiting Mongolia has steadily decreased from 2012 to 2016. As of 2017, there were 469.3 thousand tourists, increased by 13.2 thousand tourists or 2.9 percent, and by 65.1 thousand tourists or 16.1 percent respectively. The number of private travelers in 2017 decreased by 21.8 thousand persons or 10.5 percent compared to 2010 but increased by 39.1 thousand persons or 26.8 percent compared to the previous year. The number of traveler/tourist/ destination arrivals increased by 97.2 percent from 2010, 27.1 percent from the previous year. According to the structure of the tourists' goal, 26.3 percent of the workforce in 2010, 45.3 percent for private purposes and 21.3 percent for tourism purposes. In 2017, it increased by 40.7 percent or by 19.4 points compared to 2010, while for private purposes 39.4 percent, down by 5.9 points and 11.5 percent by official employment by 14.8 points. The number of tourists coming from Mongolia was 30.4 percent by the People's Republic of China, 22.8 percent by

Russian citizens, 16.0 percent by Korean citizens and 22.8 percent by Japanese citizens. According to the number of employed enterprises in the field of tourism, the number of employed persons was reduced by 648 employees or 16.8 percent in 2017 but increased by 1119 workers or 53.8 percent from 2010 (NSO, Infographic of trade and service, 2017, 2018).

TOURISM FLOW BALANCE:

China tourism flow balance has decreased from 2012 to 2017 reaching 3.252, which has increased the number of China to ROK by 2 times and China to Japan 7 times respectively. Also, the number of tourists from ROK has been decreased by 2 times and from Mongolia, this number has increased in contrast.

Table 4: China tourism flow balance, changes of 5 years

<table>
<tr><th colspan="4">Flow balance, 2012 (Bilegsaikhan & Lhamtseden, 2015)</th></tr>
<tr><td>Inbound Flows</td><td>8.6</td><td>From Japan: 3.52 (40.9%)
From ROK: 4.07 (47.3%)
From Mongolia: 1.01 (11.8%)</td><td rowspan="2">Flows Balance
+ 5.02</td></tr>
<tr><td>Outbound Flows</td><td>3.58</td><td>To Japan: 1.16 (32.3%)
To ROK: 2.25 (62.7%)
To Mongolia: 0.17 (0.05%)</td></tr>
<tr><th colspan="4">Flow balance, 2017 (NBSC, 2018)</th></tr>
<tr><td>Inbound Flows</td><td>8.4</td><td>From ROK: 3.86 (46%)
From Japan: 2.68 (32%)
From Mongolia: 1.86 (22%)</td><td rowspan="2">Flows Balance
- 3.252</td></tr>
<tr><td>Outbound Flows</td><td>11.652</td><td>To Japan: 7.35 (63.1%)
To ROK: 4.16 (35.7%)
To Mongolia: 0.142 (1.2%)</td></tr>
</table>

Table 5 shows Japan tourism flow balance, which has increased from 2012 to 2017 and has reached 9.518, describing the number of tourists from ROS and China is 7 times more. On the contrary, Japanese tourists have reduced their travel abroad.

Table 5: Japan tourism flow balance, changes of 5 years

<table>
<tr><th colspan="4">Flow balance, 2012 (Bilegsaikhan & Lhamtseden, 2015)</th></tr>
<tr><td>Inbound Flows</td><td>2.75</td><td>From China: 1.16 (42.2%)
From ROK: 1.57 (57.1%)
From Mongolia: 0.02 [14] (0.7%)</td><td rowspan="2">Flows Balance - 4.3</td></tr>
<tr><td>Outbound Flows</td><td>7.05</td><td>To China: 3.52 [18] (49.9%)
To ROK: 3.51 (49.8%)
To Mongolia: 0.02 [14] (0.3%)</td></tr>
<tr><th colspan="4">Flow balance, 2017 (SBJ, Statistical handbook of Japan 2018, 2018)</th></tr>
<tr><td>Inbound Flows</td><td>14.51</td><td>From China: 7.14 (49.2%)
From ROK: 7.35 (50.7%)
From Mongolia: 0.02 (0.1%)</td><td rowspan="2">Flows Balance + 9.518</td></tr>
<tr><td>Outbound Flows</td><td>4.992</td><td>To China: 2.68 [18] (53.4%)
To ROK: 2.29 (45.9%)
To Mongolia: 0.022 (0.7%)</td></tr>
</table>

ROK tourism flow balance decreased from 2012 to 2017 reaching 721 in Japan, 7 times. Although the travel to China and Mongolia has decreased, it has also fallen by two times from Korea and has surpassed Mongolia and China, but it does not exceed the outflow.

Table 6: Korea tourism flow balance, changes of 5 years

Flow balance, (Bilegsaikhan & Lhamtseden, 2015)			
Inbound Flows	5.765	From China: 2.25 (39.0%) From Japan: 3.51 [22] (60.9%) From Mongolia: 0.005 [14] (0.1%)	**Flows Balance + 0.075**
Outbound Flows	5.69	To China: 4.07 (71.5%) To Japan: 1.57 (27.6%) To Mongolia: 0.05 [14] (0.9%)	
Flow balance, 2017 (KTO, 2018)			
Inbound Flows	6.553	From China: 4.16 (63.5%) From Japan: 2.29 (34.9%) From Mongolia: 0.103 (1.6%)	**Flows Balance - 4.521**
Outbound Flows	11.074	To China: 3.86 (35.0%) To Japan: 7.14 (64.3%) To Mongolia: 0.074 (0.7%)	

Table 7 shows Mongolian tourism flow balance. Despite the fact that China's access to China and Korea's traffic have risen, the downward trend from China has led to a negative impact. Also, the Mongolians increased China and South Korea, making the flow balance up to 1.745.

Table 7: Mongolia tourism flow balance, changes of 5 years

Flow balance, (Bilegsaikhan & Lhamtseden, 2015)			
Inbound Flows	0.289	From China: 0.228 (78.9%) From Japan: 0.017 (5.9%) From ROK: 0.044 (15.2%)	**Flows Balance - 0.746**
Outbound Flows	1.035	To China: 1.01 (97.6%) To ROK: 0.005 (0.5%) To Japan: 0.02 (1.9%)	
Flow balance, 2017 (NSO, Mongolian Statistical Yearbook 2017, 2018)			
Inbound Flows	0.238	From China: 0.142 (59.6%) From Japan: 0.022 (9.3%) From ROK: 0.074 (31.1%)	**Flows Balance - 1.745**
Outbound Flows	1.983	To China: 1.86 (93.7%) To ROK: 0.103 (5.2%) To Japan: 0.02 (1.1%)	

CONCLUSION:

Since the 1900s, the international tourism has been expanding aligned with the political, economic and social transformations in the country. The economic structure has been changed, and tourism is becoming one of priority sectors of economic development. Slow path of the tourism sector growth does not directly related to absence of tourist sites to visit; rather 24 years were spent on introducing right conceptual framework and establishing proper institutional structures in the country. During 1990-2012 the tourism revenue was pursued from the international tourism mainly, while now the focus is shifted to the in-country tourism. One of indicators of such shift is a stable proportion of international inbound travelers to the country during last 4 years. It can be considered as real capacity of Mongolia’s market. Based on the analysis of international tourism statistics, major economic variables, NAF and global flow data the followingconclusions were drawn:

a. Since 2000, Mongolia’s outbound flow has been intensified, geographical destinations are concentrated in NAF, and purpose/content of travels are changing. In 2004-2012 during 9 years, out each 20 tourists headed to NAF region 12 are from China, 4 – from Japan, 4 – from Korea, and 1 – to Mongolia respectively.
b. The inbound market in China, Korea and Japan is small, and contributions to economic grow is negligible subsequently.The people visist these countries for trading, business, and training purposes mainly, not leisure.This low portion is associated with the overall economic development level, population size and people’s income.
c. The interest of international tourism (0.81) is much higher than the Mongolian’s interest and it is higher by 3 times. Mongolia’s inbound tourism contributed to China’s ratio as 0.228(159.6 million USD), Japan 0.017 (24.6 million USD), ROK0.044 (51.6 million USD) respectively Total amount is USD 235,8 million. According to the ministry official data in 2011, the above three destinations comprise in total USD 282.6 million, which is 83.4% of total revenues which demonstrate that outbound flows of these countries play an important role in Mongolia’s exports. Therefore, the measures to reach deeply NAF market are the priority policy interventions.
d. Since majority of raw materials such as fuel, foodstuff utilized by the tourism sector in Mongolia are imported, which diminishes the efficieny of exports and result in negative service balance.

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