
YANOLJA
RESEARCH

BRIEF
VOLUME.8

yanolja research

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Enhancing Inbound Tourism Data Management System: Lessons from Japan

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As the world adjusts to a new normal amid the realization of the endemic phase, various industries are showcasing resilience and seeking opportunities for transformation. Among these, the tourism sector plays a pivotal role in the economic revitalization of nations, with inbound tourism acting as a crucial factor directly impacting domestic economies. Japan has achieved remarkable success in the realm of inbound tourism, which could partly be attributed to external factors like the depreciation of the yen. However, the key to their sustained success over the past decade lies in the systematic and concrete utilization of tourism data, enhancing visitor satisfaction and increasing repeat visitation rates.

Japan's established system for tourism data management has been recognized as the cornerstone propelling the development of their tourism industry. Through the study of this successful model, the strategic utilization of tourism data is gaining prominence in Korea as well. Hence, this brief aims to meticulously evaluate and analyze Japan's data collection and management system in the tourism sector, comparing it with Korea's tourism data, identifying areas for improvement, and suggesting avenues for advancement. Such analysis will allow for a deeper comprehension of Japan's success and enable our tourism industry to identify areas for improvement based on these cases.

Specifically, this brief intends to comprehensively review Japan's inbound tourism data system across four dimensions widely used in data system assessment—diversity, sufficiency, timeliness, and applicability. By conducting a comparative evaluation with the current tourism data system in Korea, the goal is to pinpoint discrepancies. Finally, using these identified differences as a basis, recommendations will be proposed for augmenting our future data systems.

< Criteria for Data Evaluation >

- **diversity** : Does it offer a range of data, including public and private sources?
- **sufficiency** : Does it provide enough data for advanced analysis?
- **timeliness** : Does it offer data with a frequency that allows timely analysis?
- **applicability** : Does it facilitate user-friendly data utilization, such as dashboards and data download functionalities?

[Diversity] Provides diverse data across various fields but sourcing appears limited.

JTA (Japan Tourism Agency)¹ and JNTO (Japan National Tourism Organization)² offer a wide array of data. JTA conducts statistical surveys related to the tourism industry, while JNTO collects valuable information for marketing and promotion. The data provided by these two entities encompass characteristics of tourists, trends, entry statistics, travel patterns, regional tourism, and country-specific information. Leveraging this data allows for a multifaceted understanding of inbound market trends and tourist characteristics.

However, the sources of data collection seem relatively limited. Most data appears to be collected and provided only by public institutions like JTA and JNTO, with relatively scarce utilization of derived data from private companies or social media.

Japan's Inbound Tourism Data

Category	Types	Data Sources
Trends	Consumption Trend Survey for Foreigners Visiting Japan	JTA
Arrivals	Immigration statistics	Processing of Ministry of Justice statistics
Accommodation	Overnight travel statistical survey	JTA
Air Travel & Transport	FF-Data (Flow of Foreigners-Data)	Ministry of Land, Infrastructure, and Transport
	JNTO App data	JNTO
Local Tourism	Tourist visitor statistics	JTA
National Information	Market-specific information (Recent trends and international travel patterns)	overseas JNTO offices
Tourism Industry	MICE statistics	JNTO

Source: JTA; JNTO

1 A government agency established in 2008 under the Ministry of Land, Infrastructure, and Transport to promote inbound tourism

2 An organization responsible for attracting tourists and conducting promotional activities.

[Sufficiency1] Provides detailed data for a clear understanding of the inbound market.

Collecting inbound tourism data can be a complex and challenging process compared to other data. It involves considering various variables such as the diverse nationalities, cultural backgrounds, travel patterns, and preferred activities of foreign tourists. Additionally, there are difficulties in handling issues during data collection, including linguistic diversity, legal regulations regarding personal information protection, and other related concerns.

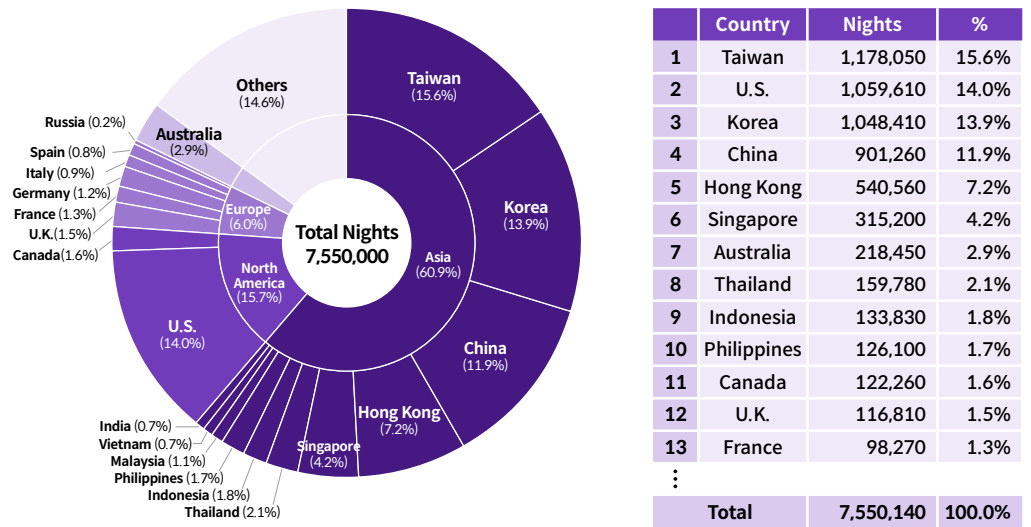
However, despite these challenges, Japan offers highly detailed information allowing for the analysis of foreign tourists' behavior by nationality and region. They delve deeply into both quantitative and qualitative information, exemplified by cases like the "Overnight travel statistics survey" and "Market report".

□ Overnight Travel Statistics Survey

The Overnight Travel Statistics Survey is conducted by JTA to understand the state of accommodation travel within Japan. Among approximately 60,000 accommodation facilities, those employing 10 or more staff members undergo a complete survey, while those with 5 to fewer than 10 employees are randomly sampled at one-third of the population. Furthermore, establishments with fewer than 5 employees are randomly selected at one-ninth of the population for the survey. This method involves surveying approximately 20,000 lodging facilities in total, which represents around one-third of the population. Considering the comprehensive survey of establishments with 10 or more employees, the "long tail" of the Japanese accommodation market, this survey can be deemed adequately representative.

A noteworthy aspect of this survey is its inclusion of information on foreign lodging guests. It examines the nationality proportions of foreign guests in establishments with 10 or more employees, allowing for an understanding of trends among foreign guests based on regions and types of accommodations. Consequently, this serves as fundamental data to comprehend each nationality's preferences regarding regions favored by foreign tourists, average length of stay in those areas, preferred types of accommodations, and more.

Overnight Travel Statistics Survey results (as of June 2023)



Source: JTA

Market report

JNTO regularly publishes reports on inbound markets for Japan, covering 21 countries and 2 regions. These reports encompass tourism industry-related issues, basic information, and overseas travel trends specific to each market. The necessary information is primarily collected by JNTO's overseas offices.

JNTO provides not only content related to travel in Japan but also information aiding in understanding the market, including the current status of overseas travel, characteristics of travel consumers, and characteristics based on travel types. Particularly within sections related to travel in Japan, JNTO offers highly specific analyses regarding the competitiveness of prices for travel to Japan in that market, popular regions, travel behavior of target segments, and promotional methods.

[Sufficiency2] Enhanced levels of detail through processing and combination of existing statistics

Japan has been making considerable efforts to expand and advance existing statistics. To provide richer information, they conduct additional surveys or combine existing statistical data with data from other departments to deepen the depth of data. Statistical adjustments occur during the data processing, making it challenging to guarantee absolute accuracy. Nevertheless, utilizing this generated data allows for a certain degree of understanding of the characteristics of foreign tourists. Consequently, it enables the formulation of more detailed policies or the planning of tailored products for tourists. Related datasets include "Tourist Visitor Statistics" and "FF-Data (Flow of Foreigners-Data)."

□ Tourist Visitor Statistics

"Tourist Visitor Statistics" is a survey conducted to assess the number of domestic and foreign visitors and their tourism expenditures at each region's tourist attractions. This survey takes place in each region, specifically within prefectures, where the institutions responsible for managing tourist attractions or organizing events are surveyed regarding the number of visitors. Additionally, surveys are conducted among tourists who visit these areas to gather information on tourism expenditures. Some survey results, due to insufficient sampling, are challenging to generalize, thus they are combined and utilized alongside existing JTA statistics.

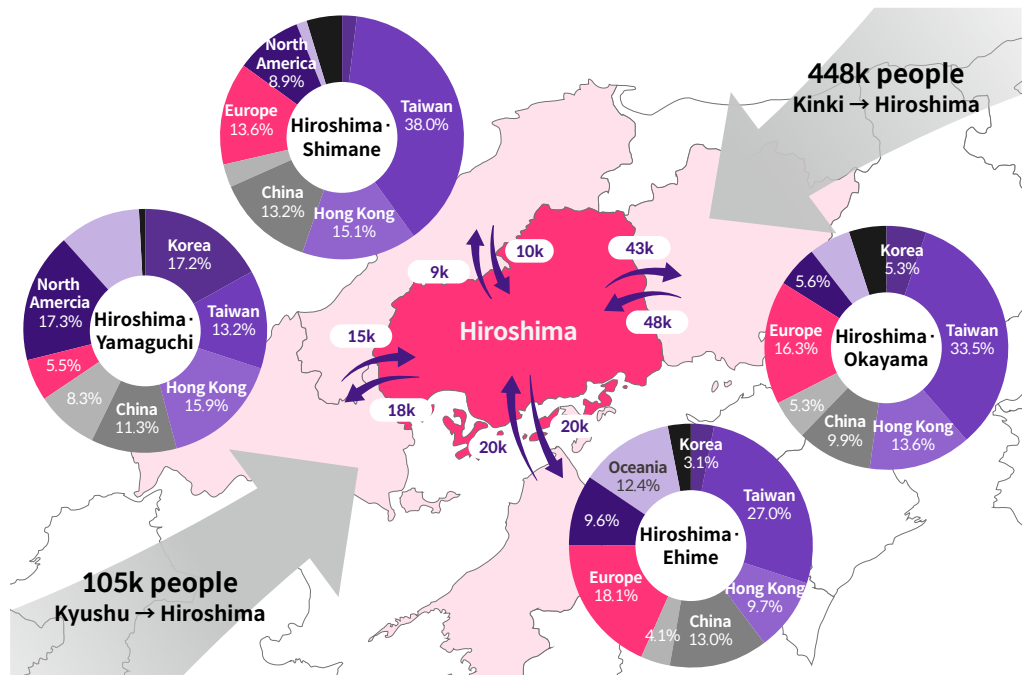
Before the adoption of common criteria for "Tourist Visitor Statistics," there were issues with different regions employing their independent survey methods, making comparisons between regions difficult. To address this, JTA established common criteria through expert consultation and discussions. Consequently, each prefecture compiles survey results according to the prescribed format and submits them to JTA, which then aggregates and publishes the collected data. With standardized criteria in place, it became feasible to compare and analyze tourist arrival numbers and expenditures among regions based on visit purposes and tourist demographics.

□ **FF-Data (Flow of Foreigners-Data)**

Let us now examine the "FF-Data" supplied by the Ministry of Land, Infrastructure, Transport, and Tourism. This dataset is an amalgamation of rigorously processed information derived from established surveys: JTA's 'Consumption Trend Survey for Foreigners Visiting Japan', the aviation authority's 'International Air Passenger Traffic Survey', and the Ministry of Justice's 'Immigration Statistics Monthly Report'. Notably, this dataset offers a comprehensive perspective on the movements of foreign tourists across different prefectures.

For instance, based on the 2019 data, the most substantial influx was observed between Chiba and Tokyo, followed by notable movement between Kyoto and Osaka, and subsequently, Osaka and Nara. This dataset allows for detailed analyses based on nationality, travel purpose, age demographics, gender, and preferred modes of transportation. To illustrate, the 2019 analysis between Toyama and Nagano revealed approximately 55,000 tourists traveling from Toyama to Nagano and around 51,000 in the opposite direction. Among foreign tourists, Taiwan, Hong Kong, Southeast Asia, and Korea emerged as the prominent nationalities, while the utilization of buses and railways notably dominated the transportation methods.

[Example] Analyzing Mobility in Hiroshima and Nearby Areas via FF-Data



Source: MLIT, FF-Data (訪日外国人流動データ) の概要と利用例 (2021)

[Timeliness and Applicability] Short data release cycles, user-friendly dashboards, and access to raw data

In Japan, inbound tourism data is primarily disseminated by public institutions, featuring relatively short data release cycles. For instance, the "Overnight Travel Statistics Survey" is conducted quarterly with monthly data updates. Similarly, the "Trends in Foreign Visitors' Spending in Japan" is released quarterly, presenting results from the preceding quarter in January, April, July, and October.

Moreover, these sources provide dashboards that facilitate easy visual comprehension of the data. Through these dashboards, users can select data pertinent to their needs and intuitively comprehend data trends. Additionally, the provision of downloadable data and graphs offers users the flexibility to utilize the data according to their preferences.

Korea's Inbound Tourism Data: Excelling in Diversity, Needing Improvement in Sufficiency

Since 2021, Korea has operated the 'Korea Tourism Data Lab,' a tourism big data platform, to enable industry stakeholders to make data-driven decisions. This platform provides diverse inbound tourism-related data and information.

The results of foreign visitor surveys, statistics like entry-exit counts, and travel balances offer an overall understanding of foreign tourist trends. Additionally, the platform supplies fourth-industrial-revolution-appropriate big data, including mobile communication, credit card, and global social media data. This means Korea offers a more diverse range of data compared to Japan, not only from public sources but also from private and social media sources.

However, the available data might not be sufficient for detailed analysis of the inbound tourism market or for formulating specific strategies for each market. For instance, while mobile communication data enables tracking foreign tourists' regional visit trends, understanding movements between regions or visitor counts by nationality remains challenging. Additionally, while the Korea Tourism Data Lab provides an overview of countries and comprehensive analyses, it merely aggregates information from KOTRA's national information service and the existing International Visitor Surveys. The data on overseas market trends collected by consulate overseas offices seems to be limited to basic information provision at this point.

Nevertheless, in terms of timeliness and usability, the data is notably strong. Particularly, private sector-provided mobile communication and credit card data can be confirmed one month later, and upon upload, the Korea Tourism Data Lab promptly reflects information on its dashboard. Users can customize data inquiries based on their desired duration and regions.

Korea's Inbound Tourism Data

Category	Types	Data Sources
Trends	International Visitor Survey	Korea Culture & Tourism Institute
Arrivals	Immigration statistics	Processing of Ministry of Justice statistics
Air Travel & Transport	Mobile communication data	KT / SKT
Consumption	Credit card transactions	BC card, Shinhan card
Local Tourism	Preferred tourist destinations by region for foreigners	Visitkorea website
	Visitor numbers at major paid tourist spots	Korea Culture & Tourism Institute
National Information	Trends in the tourism market	overseas KNTO offices
Tourism Industry	MICE statistics	KNTO
	Travel balance	The bank of Korea
	Cruise statistics	Ministry of Justice statistical processing
Potential Demand	Survey of potential travelers to Korea	KNTO
	Global social media	Facebook, Instagram, Twitter, etc.
Others	Status of Muslim visitors to Korea	KNTO
	Tourist information, complaints for tourism inconvenience	KNTO

Source: Korea Tourism Data Lab

Comparison of Inbound Tourism Statistics and Data between Korea and Japan

Category		Korea	Japan
Diversity		●	●
Sufficiency	Public Data	Characteristics and Trends of Tourists	●
		Arrivals	●
		Accommodation	○
		Aviation and Transportation	●
		Local Tourism	●
		Tourism Industry	●
	Private Data	Accommodation	○
		Aviation and Transportation	○
		Mobile Communications	●
		Reservations and Spending	○
	Social Media and Internet Data	Social Media	●
		Digital Marketing Data	●
	Others	Market-Specific Information	●
		Foreign Country Information	●
Timeliness	Public Data	●	
	Private Data and Others	●	
Applicability	Dashboard Provision	●	
	Data Download Functionality	●	

Note: The above evaluation is a subjective comparison conducted by the researcher between Korea and Japan.

Implications: Establishment of Data Control Tower System, Data Fusion

Summarizing the comparative evaluation conducted earlier, Korea stands out for diversity in tourism data, yet Japan holds a relatively stronger position in terms of data sufficiency. Moreover, both countries excel in providing relevant analytical information in terms of timeliness and usability. The key takeaway from this comparative assessment highlights the necessity for detailed data encompassing nationality-based and region-specific characteristics to accurately comprehend the nuanced inbound tourism market.

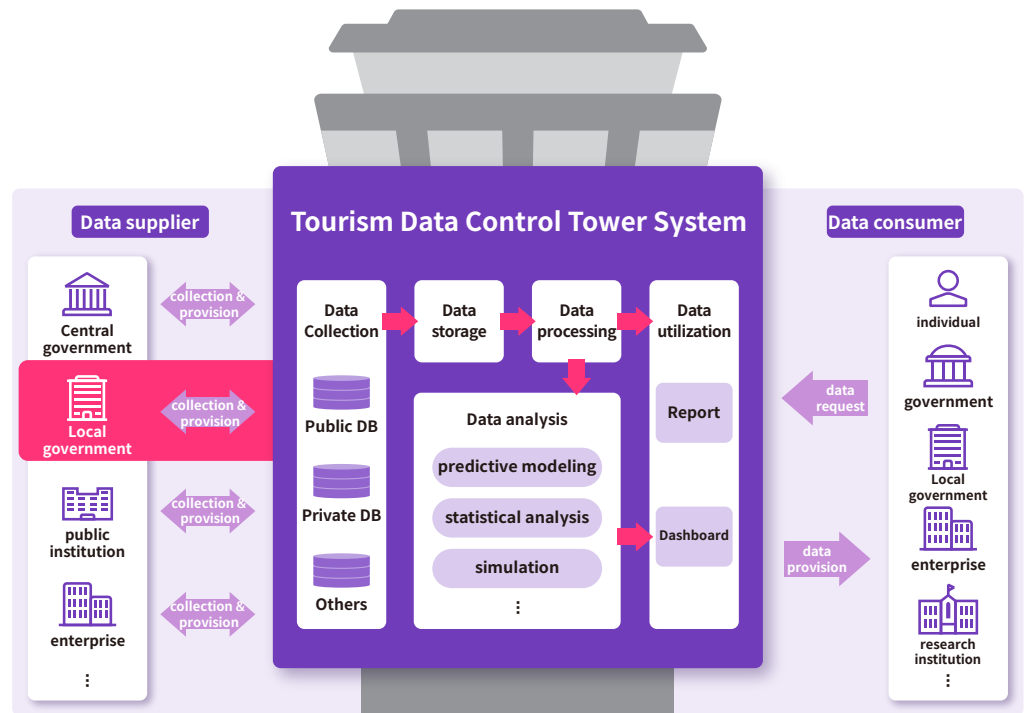
Above all, to activate regional tourism, collecting specific data on foreign tourists' regional visits and preferences regarding content becomes imperative, underscoring the crucial role of local governments. Although local governments currently gather inbound tourism data, the lack of a nationwide network and standardized procedures renders nationwide comparison or utilization unfeasible due to inconsistent data formats. Essentially, without standardized regional data, not only regional comparisons but also data management and accumulation become inconsequential.

To overcome these challenges and effectively utilize data, establishing a Data Control Tower System becomes essential. This control tower would standardize required data, efficiently collect information from sources, and ensure data quality and accuracy. If regional data is standardized and accumulated under a control tower, it would significantly contribute not only to regional comparisons but also to national-level analysis and strategy formulation within the tourism industry. Of course, this necessitates proactive data collection efforts by each local government.

If a data control tower system is established, as seen in Japan's case, it can further enhance data sufficiency by integrating existing inbound tourism statistics with other data. KNTO's 'Korea Tourism Data Lab' already provides advanced analysis services for AI-based regional analysis and areas facing population decline, mostly centered around domestic tourist data. However, by combining inbound tourism data with the existing datasets, it's anticipated that new and meaningful insights could be derived.

With richer inbound tourism data, a more detailed and accurate understanding of tourism trends could be achieved, facilitating effective policy-making and tailored service development. Yet, this endeavor isn't solely the responsibility of a single entity. Recognizing the significance of inbound tourism, it requires organic collaboration among the central government, local authorities, and the private sector to effectively collect and accumulate high-quality data at a national level.

Enhancement Strategies for Tourism Data Control Tower System



Appendix

Key Economic Indicators

Indicator	Statistics	Measure	2018	2019	2020	2021	2022	22.08	22.09	22.10	22.11	22.12	23.01	23.02	23.03	23.04	23.05	23.06	23.07	23.08	23.09	
General Economics	GDP Growth Rate ¹	Real GDP Growth(%)	2.9	2.2	-0.7	4.1	2.6	-	-	-0.4(Q4)	-	-	0.3(Q1)	-	-	0.6(Q2)	-	-	0.6(Q3)	-	-	
		Private Consumption Growth(%)	3.2	2.1	-4.8	3.7	4.3	-	-	-0.6(Q4)	-	-	-	0.5(Q1)	-	-	-0.1(Q2)	-	-	0.3(Q3)	-	-
	Composite Indexes of Business Indicators ²	Leading Indicator	94.2*	96.0*	100.0*	106.2*	108.7*	109.1	109.3	109.5	109.6	109.4	109.4	109.4	109.3	109.4	109.4	109.8	110.5	111.1	111.4	-
		Coincident Indicator	98.3*	99.7*	100.0*	103.8*	108.3*	109.1	109.3	109.3	108.9	108.4	108.2	108.7	109.5	110.0	110.3	110.3	110.0	110.1	-	
		Lagging Indicator	95.0*	97.8*	100.0*	103.7*	109.5*	110.3	110.8	111.3	111.8	112.4	112.8	112.9	113.1	113.4	113.7	113.9	113.8	113.9	-	
Business Trends	Business Survey Index ³	Total	94.1*	90.8*	81.5*	101.4*	94.6*	86.9	95.8	89.6	86.7	85.4	88.5	83.1	93.5	93.0	93.8	90.9	95.5	93.5	96.9	
		Non-manufacturing	96.9*	93.6*	84.2*	100.6*	96.1*	91.4	94.8	91.1	89.7	87.3	90.3	85.1	95.7	90.5	93.3	90.9	101.6	95.2	95.1	
		Leisure/Hospitality	-	-	-	99.5*	89.7*	90	66.7	111.1	88.9	90	85.7	77.8	88.9	120.0	107.1	100.0	128.6	123.1	100.0	
	Business Survey Index by Industry ⁴	Total	78*	73*	65*	84*	82*	79	82	79	76	74	70	68	71	73	74	76	75	73	73	
		Accommodation	78*	70*	30*	48*	85*	102	95	102	91	98	78	71	68	69	94	85	88	96	76	
	SME Business Outlook Survey ⁵	Total	87.8*	83.6*	70.7*	77.8*	82.7*	78.5	83.2	85.1	82.3	81.7	77.7	77.6	83.1	80.7	83.8	81.1	79.1	79.7	83.7	
		Food/Accommodation	87.7*	82.0*	60.7*	57.8*	80.9*	84.7	80.5	86.2	90	95.9	80.1	80.3	85.7	95.3	95.5	96.6	88.6	89.3	87.0	
	Consumer Survey Index ⁶	Consumer Confidence Index	104*	99*	88*	103*	96*	89	92	89	87	90	91	90	92	95	98	101	103	103	100	
		Consumer Expenditure Outlook	108*	108*	97*	111*	111*	110	109	110	107	108	110	112	110	111	111	113	113	113	112	
		Travel Expenditure Outlook	91*	91*	80*	89*	92*	87	91	91	89	90	90	91	94	97	99	101	101	99	97	
		Entertainment Expenditure Outlook	94*	90*	71*	86*	93*	91	93	92	89	92	91	91	92	93	94	96	95	95	94	
	Production Index of Service Sector ⁷	Total	100.6	102.0	100.0	105.0	112.0	112.1	113.2	113.5	113.4	126.8	109.7	108.2	117.5	113.9	114.1	117.6	114.0	114.0	-	
Accommodation		150.2	149.7	100.0	111.3	139.1	159.4	143.1	161.3	144.0	148.4	127.6	132.4	126.7	139.7	148.9	149.2	150.8	151.4	-		
Production Index by Industry ⁸	All Services	100.63	101.93	100.00	105.09	111.88	113.80	114.10	113.70	112.80	114.60	113.80	116.20	115.70	115.20	114.20	114.90	115.20	115.60	-		
	F&B/Accommodation	124.37	122.94	100.01	101.78	119.31	125.18	125.23	124.37	122.81	120.56	120.30	129.65	124.96	123.35	117.90	118.26	116.79	120.13	-		
Prices	Consumer Price Index ⁹	Total	99.09	99.47	100.00	102.50	107.71	108.62	108.93	109.21	109.10	109.28	110.10	110.38	110.56	110.80	111.13	111.12	111.20	112.33	112.99	
		Hotel	108.91	106.51	100.00	99.82	108.71	123.54	110.38	115.68	113.33	116.34	113.51	107.30	108.27	114.21	116.83	115.11	123.04	132.03	116.94	
		Motel	101.28	101.43	100.00	98.39	101.64	102.85	102.75	104.46	104.16	104.67	104.58	104.86	104.98	105.89	105.57	105.84	106.77	107.42	106.46	
		Resort	101.21	102.29	100.00	99.86	102.43	131.22	100.03	98.83	94.02	106.67	115.30	101.64	98.88	99.99	105.56	105.76	120.40	142.36	109.87	
		Recreational Facilities	81.99	84.36	100.00	102.65	108.58	133.59	110.99	108.09	104.94	108.70	108.77	107.16	105.95	107.64	109.89	109.95	128.87	135.46	111.76	
	Producer Price Index ¹⁰	Total	103.48	103.50	103.03	109.60	118.78	119.98	120.06	120.68	120.29	119.79	120.25	120.46	120.59	120.50	120.03	119.77	120.08	121.17	121.67	
		Accommodation service	105.32	104.41	100.25	99.80	105.91	118.58	106.77	109.92	107.84	111.55	111.40	106.08	106.20	109.78	111.92	111.14	117.91	126.30	112.96	
		Hotel	104.00	101.82	95.59	95.59	104.09	118.29	105.69	110.76	108.51	111.40	108.69	102.74	103.67	109.36	111.87	110.22	117.82	126.43	111.98	
	Motel	99.60	99.76	98.35	96.87	100.14	101.33	101.23	102.92	102.62	103.12	103.03	103.31	103.43	104.33	104.01	104.27	105.19	105.83	104.88		
	Resort	114.96	116.04	113.44	113.83	117.12	150.04	114.37	113.00	107.51	121.97	131.84	116.21	113.07	114.33	120.70	120.93	137.67	162.78	125.63		
Labor	Economically Active Population Survey ¹¹	Unemployment Rate(%)	3.8	3.8	4.0	3.7	2.9	2.1	2.4	2.4	2.3	3.0	3.6	3.1	2.9	2.8	2.7	2.7	2.7	2.0	2.3	
		Employment Rate(%)	60.7	60.9	60.1	60.5	62.1	62.8	62.7	62.7	62.7	61.3	60.3	61.1	62.2	62.7	63.5	63.5	63.2	63.1	63.2	
Tourism	Tourism Balance ¹²	Total Tourism Balance(\$M)	-13,066	-8,516	-3,175	-4,329	-5,297	-556	-302	-335	-588	-838	-1,158	-857	-573	-344	-630	-1,083	-1,151	-786	-	
		Total Tourism Income(\$M)	18,462	20,745	10,181	10,623	11,781	1,089	1,128	1,307	1,125	1,090	866	955	1,201	1,347	1,378	1,167	1,120	1,307	-	
		Total Tourism Expenditure(\$M)	31,528	29,261	13,356	14,951	17,079	1,645	1,429	1,642	1,713	1,928	2,024	1,812	1,774	1,691	2,008	2,250	2,271	2,093	-	
	Immigration ¹³	Number of Outbound Travelers(K)	28,696	28,714	4,276	1,223	6,554	702	620	773	1,041	1,393	1,782	1,725	1,472	1,497	1,683	1,772	2,154	2,093	2,017	
Number of Inbound Travelers(K)		15,347	17,503	2,519	967	3,198	311	338	476	460	539	434	479	801	889	867	961	1,032	1,089	1,098		
Currency	Exchange Rate ¹⁴	USD	1,100.30	1,165.65	1,180.05	1,144.42	1,291.95	1,318.44	1,391.59	1,426.66	1,364.10	1,296.22	1,247.25	1,270.74	1,305.73	1,320.01	1,328.21	1,296.71	1,286.30	1,318.47	1,329.47	
		EUR	1,298.63	1,304.81	1,345.99	1,352.79	1,357.38	1,334.53	1,377.09	1,404.83	1,388.29	1,371.13	1,342.37	1,361.65	1,398.50	1,446.41	1,444.20	1,405.98	1,421.87	1,439.04	1,422.61	
		JPY	996.27	1,069.75	1,105.07	1,041.45	983.44	975.17	973.2	969.36	956.51	959.12	956.76	956.68	977.31	990.52	969.37	918.39	911.74	911.4	901.65	
		CNY	166.40	168.58	170.88	177.43	191.57	193.75	198.19	198.37	189.53	185.47	183.16	185.97	189.10	191.60	190.02	180.99	178.60	181.78	182.11	

*This index should be interpreted with caution because the value is calculated by averaging monthly or quarterly indices in Yanolja Research.

1) The bank of Korea, QoQ(%)
 2) KOSTAT; 2020 = 100
 3) The Federation of Korean Industries; If the index is above(below) 100, more(less) companies expect the next month's business conditions to improve than those that do not; "Leisure/Accommodation and Food Services" sector was not surveyed before 2021.
 4) The Bank of Korea; Index range = 0-200; If the index is above 100, the number of companies with a positive outlook is greater than that with a negative outlook
 5) Ministry of SMEs and Startups; If the index is above(below) 100, more(less) companies expect the next month's business conditions to improve than those that do not
 6) The bank of Korea; Index range = 0-200; If the index is above(below) 100, consumers sense that overall economic situation is better(worse) than average.
 7) KOSTAT; 2020 = 100; Constant
 8) KOSTAT; 2015 = 100

9) KOSTAT; 2020 = 100
 10) KOSTAT; 2015 = 100
 11) KOSTAT; Surveys the unemployment rate(%) and employment rate(%) among the economically active population aged 15 and over.
 12) The Bank of Korea
 13) Korea Tourism Organization DataLab
 14) Hana Bank; Based on the sales base rate

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Date of Publication : November 3, 2023 | Publisher : Yanolja Research

Address : 17th Floor, Dongil Tower, 38, Teheran-ro 114-gil, Gangnam-gu, Seoul, South Korea

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