

2020 Asia–Pacific Statistics Week

A decade of action for the 2030 Agenda: Statistics that leaves no one and nowhere behind

15-19 JUNE 2020 | Bangkok, Thailand

Engaging Users and Investing in Statistics

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Abstract:

In the last twenty years, significant efforts have been made by the Fiji Bureau of Statistics to improve tourism statistics and gather much needed data to ensure that tourism industry makes informed decisions on how best to attract different segments of tourists into Fiji.

The Fijian economy is predominantly made up of services sector (71%) followed by industries sector (19%) and primary sectors (10%) including agriculture forestry and fisheries. The main sector in the services industry is tourism. The industry has contributed approximately 34% towards Fiji's Gross Domestic Product (GDP).

As the Fijian NSO in the Asia Pacific Region, the FBOS has been tasked with multiple challenges to meet data demands relating to patterns of cross border movements of visitors such as visitor profiles, reason for visit, mode of transportation, regions visited, country of residence, arrival by nationality and spending patterns.

The Tourism Industry is the Fiji Government's tourism marketing and promotion arm with a regional presence in 9 target regions (Australia, New Zealand, North America, China + Hong Kong, India, Singapore, Japan, UK & Europe). The industry's mandate is to increase visitor arrivals and visitor expenditure into Fiji through marketing campaigns. The industry is guided by overarching strategies, which are to add value to the 'Fiji Where Happiness Finds You Brand' and improve seasonality throughout the year, paying particular attention to growing visitation during the low and cyclone-prone seasons. The marketing campaigns are primarily centered around increasing the number of holiday visitors to Fiji and to increase their average length of stay so that they experience more of Fiji and hence spend more, and supporting international events in the low season that bring in visitors, thus increasing visitor spending.

This study explores the administrative data, sourced from the department of immigration against the data needs of the tourism industry. In order to understand and fulfil the tourism sectors requirements, three scenarios are proposed. Scenario 1 suggests changes to the current Fijian arrival card. This would give chance to relevant tourism stakeholders to have a say on the contents of the arrival card. Scenario 2 proposes to set up a capacity building scheme to collect better quality data from an alternative source. Scenario 3, the most ambitious one, recommends the FBOS to have specialized knowledge and skills to prosper in market data collection, statistical analysis and forecasting using the current data sets on visitor arrivals and departures.

Keywords: "Visitor Arrivals", "Spending Patterns", "Tourism Statistics", "Gross Domestic Product", "Economy"

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1. Introduction:

The overall vision of the Fijian Tourism sector is to grow into a \$2.2 billion industry by 2021, increasing visitor arrivals to 930 000 and deepening the amount spent by visitors, thus spreading benefits from tourism throughout the country. The future of the Fijian tourism industry is comprehensively dependent on the quality of visitor arrivals and departures data compiled by the Fiji Bureau of Statistics [FBOS]. The data analysis team at the FBOS have always been very critical on analysing all aspects of tourism details which has resulted in interpretations and findings.

The tourism sector is seen as an economic powerhouse contributing to a third highest in world export earnings (UNWTO, 2018). Tourism related activities contribute both directly and indirectly to all the Sustainable Development Goals. In particular it has been included in Goals 8, 12 and 14 on inclusive and sustainable economic growth, sustainable consumption and production and the sustainable use of ocean and marine resources respectively.

It is very vital to engage and consult the data users on key variables pertaining to tourism development before planning on investment options. The Fijian government has set up a committee comprising of government departments, statutory organisations, private sector groups, development partners, educational institutions, civil society and foreign missions to develop an effective development plan. The key components of the development plan will function as a monitoring tool through which changes in the tourism industry will be tracked over a period of time.

The FBOS however has faced multiple challenges in satisfying the demands of the data users. The obtained administrative data lacks detailed information. The missing fields and inaccurate data entry is an on-going concern. Key components of the Fijian arrival card have not been made mandatory in the system which results in inconsistencies once the administrative data is run. There is also no arrangements for an alternative data source even though some statutory organisations have shown the potential for this collection.

The future of the Fijian tourism industry will be based on detailed knowledge of tourism markets. Quality data on visitor profiles, activities, motivators, regions visited, length of stay, origins and spending patterns will assist with the successful development, marketing, and overall sustainability of Fiji as a tourist destination. This paper will measure the thematic areas with the situational analysis data by revealing strategies and findings.

2. Methodology:

Tourism continues to be the major source of economic activity in Fiji and has surpassed all other sectors of the economy to become Fiji's number one foreign exchange earner.

Tourism Data Collection at the Border

Currently, the tourism data collection is being done in isolation. The current raw data collections include:

- Visitor arrivals (monthly by country of residence, age, occupation, length of stay, and purpose)
- Hotel and tourist accommodation collection (quarterly by number of rooms and beds, nights, occupancy rates, takings, employment, location, visitor country of residence)
- Earnings from tourism (quarterly expenditure by non-residents by length of stay, purpose of visit and country of residence)
- Market research collection
- Tour operator database collection
- International visitor survey
- Airline passenger load data

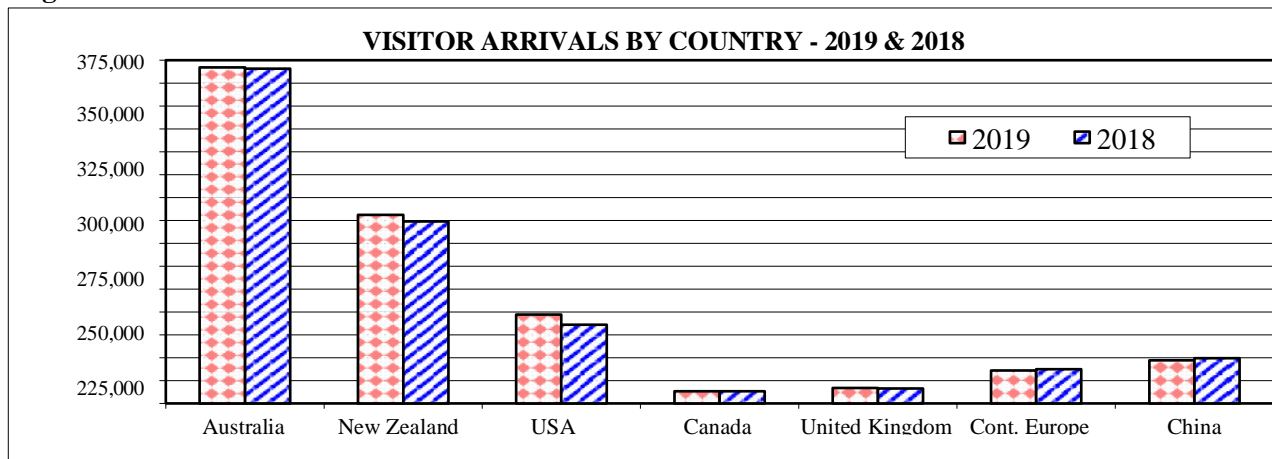
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- Service Turnover Tax and Environmental Climate Adaptation Levy
- Surveys of tourism businesses as part of annual business survey program (annual data on sales, intermediate costs, wages and salaries, investment, employment, ownership status)

Figure 1



Source: Fiji Bureau of Statistics

Tourism Satellite Account

The Tourism Industry spreads across a good number of industrial activities such as Accommodation, Food and Beverage, Transport, Travel Agencies, Recreation and Entertainment. The contribution of these industries is apportioned to determine the Direct Tourism Contribution. This amalgam is classified under the Tourism Satellite Account [TSA].

Direct Tourism contribution to GDP is a percentage of the Direct Tourism Value added to the GDP at current basic price for a given year.

The TSA permits the measurements of the following indicators:

- Tourism's ranking compared to other economic sectors
- Tourism consumption
- Tourism's contribution to GDP
- Number of jobs created by tourism in an economy;
- Investment in the tourism sector
- Characteristics of tourism human resources
- Tax revenues generated by tourism industries
- Tourism's impact on a national balance of payments

Table 1: Direct Contribution to GDP

Years	Direct Tourism Value Added [F\$]	Direct Tourism contribution to GDP
1995	264,929,000	10.5 %
2002	402,000,186	11.2 %
2008 p	613,617,000	13.0 %
2009 p	486,587,462	10.2 %
2010 p	569,538,941	11.3 %
2011 p	661,638,961	11.5 %
2012 p	703,251,699	11.7 %
2013 p	777,006,487	12.1 %
2014 p	928,128,014	13.0 %

Source: Fiji Bureau of Statistics

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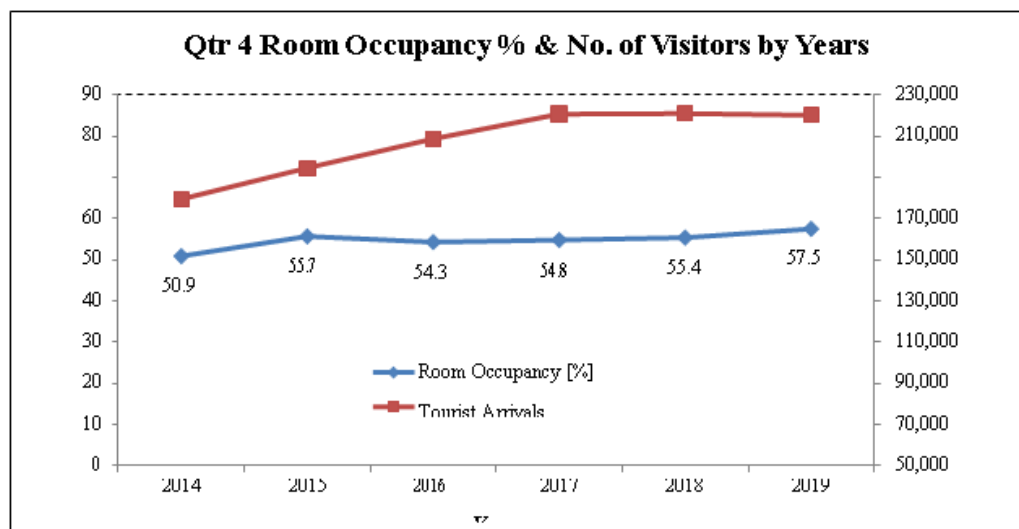
International Visitor Survey

Fiji's International Visitor Survey comprises of both quantitative and qualitative study. The purpose of this survey is to provide Government and tourism stakeholders with regular, comprehensive and accurate information on the characteristics, behaviour and expenditure of visitors to Fiji. These variables provide crucial information to Government, Tourism Fiji and the tourism industry in order to ascertain tourist preferences and experiences overtime and how the industry should be positioned to be able to better meet these changes in the long run.

Hotel Data Collection System

The Hotel Data Collection System (HDCS) aims to provide Government and stakeholders with up-to-date tourism occupancy data in a manner that is more accurate, faster and more reliable than current methods. Information extracted from the HDCS will help enhance planning and assessment processes while improving decision making for marketing. Moreover, more accurate room inventory data from the HDCS will help determine national development priorities to better maximise returns that will benefit Fijians.

Figure 2



Source: Fiji Bureau of Statistics

3. Result:

Understanding the tourism industry requires active monitoring that is essential for continued development. The development plan set by the government has identified the following areas of data collection which require improvements:

Current contents of the Fijian arrival card to be reviewed and realigned based on the needs of the data users. Reason for visit options to be further categorised and must include eco-tourism options. Each field on the arrival card has a statistical purpose needed by the data users. Fiji has a considerable amount of information on tourism from a visitor or demand perspective. Details on arrivals, accommodation and visitor expenditure are impressive. Aside from informing on the trends in tourism activity, at least from an economic perspective, these data are fundamental in understanding the balance of payments position for Fiji since 75% of tourism activity is from international visitors. The Reserve Bank of Fiji has a particular interest in these data in assessing associated international financial flows and exposures.

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Information by Region

Data on arrivals by State or Province is critical in formulating successful tourism strategies. Knowing who is coming to your area, why they are coming and what they are doing upon arrival. These global trends provide Fijian businesses and communities opportunities to develop varied products for travellers who are more likely to go “off the beaten” path and see more of Fiji.

Therefore, to capitalise on these opportunities, efforts need to be made to develop products in less travelled regions of the country. This requires thorough market research on emerging trends to enable better understanding of visitor preference and how Fiji can meet these needs. Additionally, sales channels need to be strengthened between new products and visitors, in parallel to developing immersive community-based tourism activities that allow entrepreneurs to link to emerging markets.

A snapshot of visitors from a region

Fiji has recorded the highest number of visitors for the month of July for years 2018 & 2019. Planners using arrival by state data will have detailed information to suit the need of a visitor in terms of tourism related expenditure, accommodation, market share, transport and other related activities such as eco-tourism, scuba and padi dives.

International Markets

Visitors from different regions/states travel in different ways.

A region may experience high levels of visitation from a particular state, or you may be looking to attract visitors from a particular international source market.

In either case, understanding how these visitors travel and what they like to do is crucial.

Continuous data compilation on arrivals by state or province provides a benchmark going back several years to help identify visitor trends over time – users of data depend on FBOS to provide this.

The TSA utilizes the full range of visitor data and tourism business data as listed above and thus provides a framework for examining and ensuring data coherence. TSA is currently produced at irregular intervals and based on estimates from previous TSAs. The TSA is an important document which needs to be produced on a 2-year interval to accurately ascertain the economic flows throughout the industry, allow informed policy decisions, and target areas in need of stimulus.

IVS need to be modernised and in-house capacity built to allow analysis and extraction of real time data. The Ministry responsible to build in-house capacity to ensure staff are trained to analyse IVS data and provide quarterly reports for policy and business decision making.

Fiji’s existing and emerging markets are highly segmented and require in depth research to identify better marketing strategies. The research will provide valuable insights into Fiji’s emerging markets and enable priorities to be set for growing value from these markets.

Hotel data collection needs to be robust and digitized. Development of the HDCS and mandated implementation for all tourism accommodation properties.

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4. Discussion, Conclusion and Recommendations:

The intention of this paper was to ascertain the economic relationship between data users and data providers. Effective collaboration between Government, NSO's and relevant stakeholders generates the much needed research information rather than reliance on estimates. This conduct will further diagnose and review key issues, thus, creating timely reports. Direct contribution of tourism to gross domestic product covers direct purchases of goods and services by visitors and the costs incurred by business to produce those goods and services.

Overall, there is a very strong case that the development of a statistical framework for the measurement of sustainable tourism is relevant for Fiji and that the compilation of data within such a statistical framework is feasible in Fiji. The Fiji Bureau of Statistics is well placed to pursue ongoing developments in this area. In the short term, work to prepare critical data tables is necessary as these tables will support ongoing discussion among key stakeholders and reveal new ideas and inputs for the advancement of the work. More broadly, considerable advantages are envisaged from applying statistical and accounting approaches to the organization of tourism related information from multiple sources for coherence and consistency of data.

Further, this proposed paper on sustainable tourism will contribute directly to the development of an international statistical framework for measuring sustainable tourism by providing a country level application.

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