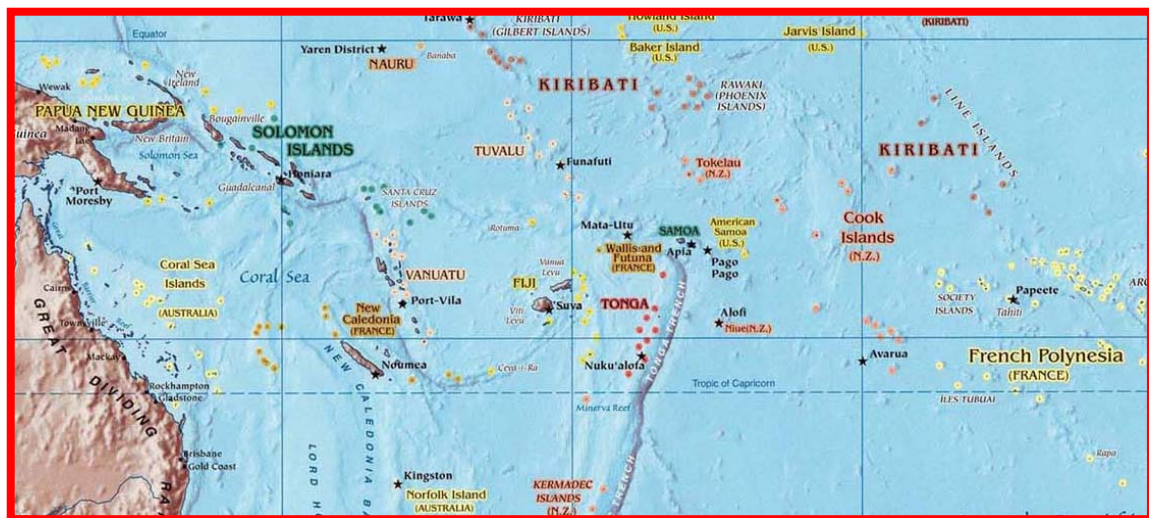


WTO/SPTO PROJECT

FOR THE ESTABLISHMENT OF A STANDARDISED SYSTEM FOR DATA COLLECTION AND RECORDING OF TOURISM STATISTICS FOR SOUTH PACIFIC COUNTRIES

INTERIM REVIEW - AUGUST 2005 (DRAFT)



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ABBREVIATIONS AND ACRONYMS

ATM	Automated Teller Machine
CAGR	Cumulative Annual Growth Rate
C.i.f./f.o.b.	Cost, insurance and freight / free on board
CPC	Central Product Classification
FISIM	Financial Intermediation Services Indirectly Measured
GDP	Gross Domestic Product
GSS	General Statistical System
I/O	Input-Output
MICE	Meetings, Incentives, Conferences and Exhibitions
NPISHs	Non-profit Institutions serving Households
NSO	National Statistical Office
O/F	Occupancy Factor
PACREIP	Pacific Regional Integration Programme
PRTDP	Pacific Region Tourism Development Programme
PPP	Purchasing Power Parity
RevPAR	Revenue per available room
SAM	Social Accounting Matrix
SIOT	Symmetric Input-Output Table
SNA	System of National Accounts
SPTO	South Pacific Tourism Organisation
STS	System of Tourism Statistics
SUT	Supply and Use Tables
TSA	Tourism Satellite Accounts
USP	University of the South Pacific
VAT	Value Added Taxes
WTO	World Tourism Organisation
WTTC	World Travel and Tourism Council

EXECUTIVE SUMMARY OF INTERIM REVIEW

1. Introduction

This Interim Review sets out the findings from a survey of 'the process' of collecting and compiling 'tourism statistics' in the twelve member countries of SPTO, focusing particularly on (1) the arrival statistics, (2) visitor surveys, (3) tourism industry statistics, (4) source market information and (5) tourism satellite accounts. Because of time constraints it has not covered aspects, important though these are, such as environmental or social statistics. Also, it is necessary to emphasise that the work has been concerned with 'the process' of collecting statistics and not with the interpretation of the current statistics.

This Interim Review sets out the findings of the Consultant on what is happening within the region, and also sets out Options for improvements or for new initiatives in the above five fields. Such options or initiatives are to be considered at a WTO/SPTO Regional Workshop to be held in early November 2005 with a view to their practicability and desirability for being implemented.

Approach to this Review

The Consultant undertook a telephone interview programme, with follow up through emailing, with the twelve member tourist offices in the South Pacific. In addition field trips were made to Fiji, Papua New Guinea, Vanuatu, Tonga and Samoa. The collection of data for this assignment is an ongoing process in itself.

Users of Tourism Statistics

In the countries to which field trips were made, the Consultant carried out discussions with the private sector tourism industry. Usually the industry was represented by the country tourism association or hotel association. Whilst this does not equate with a formal survey of the users of tourism statistics, nonetheless many useful insights were gained into the requirements from the statistics.

2. Arrival Statistics

Arrival statistics could be described as the core measurement for international tourism. In general, in the South Pacific the statistics are well prepared and are disseminated to interested parties, who for the most part do appreciate the statistics and use them.

Options for improvements relate to:

- ◆ The speed with which such statistics can be got out. Can these be produced on a consistent basis within two weeks from the end of the month, both for each member country and for the region? The essential point is that statistics produced rapidly can be used for influencing, and improving marketing decisions/ campaigns;

- ◆ The issue of greater segmentation notably with regard to (1) the purpose of visit (mainly, who are the holiday visitors?) and (2) the use of commercial accommodation as opposed to staying with friends and relatives. Can there be statistical series, both for each member destination and for the region, that indicate trends in these market segments?
- ◆ In looking at country of residence, cannot this be broken down into more significant geographical segments (e.g. there is a big difference between Melbourne as a market, and Brisbane as a market)?
- ◆ Linking up the arrival statistics with the airline statistics, because, when there are discrepancies, there is an issue of credibility for the destination in the eyes of the travel trade and in the eyes of potential investors. Can these two be reconciled especially in view of the changes that are taking place in the air travel environment in the Pacific?
- ◆ Can the entry/arrivals cards be extended in scope to cover a number of key market segments (e.g. as is done by French Polynesia – first time visitors, stopovers etc.)?
- ◆ Given the importance of obtaining the original information on the ED Cards, is there a case for sensitisation programmes for immigration staff to ensure that forms are filled in correctly? This would require some sort of training programmes to ensure that Immigration Staff are aware of the importance of such statistics and the significance of tourism to the economy

The Review indicates that all these options are technically feasible. It is more a question of whether or not there is a will, there is the capacity and there are budgets to do so. However, two factors that have to be borne in mind are: -

- (1) the future growth in electronic passports may reduce what can be obtained by manually-entered cards; and
- (2) when entry cards become large in number (e.g. 100,000+), arguably, it becomes cost-ineffective to enter data into a computer for all the cards. The Statistics Office would have to turn to sampling of the manually-entered cards.

Travel Receipts

With regard to travel receipts, it appears that the process of getting the information through the Banking system is becoming increasingly difficult because of (1) the problems of classifying transactions so as to distinguish travel, and (2) capturing some of the foreign exchange transactions with the proliferation of ATMs. More often, the Visitor Survey and the Arrival Statistics provide the basis for an estimate of travel receipts (credits). Travel debits still tend to be collected via the Banking system but this reflects the lower level of outbound travel.

3. Visitor Surveys (Sample Surveys)

It is the view of the Consultant that sample surveys will increasingly become a major source of both marketing information and economic information relating to tourism. Fiji undertakes a regular survey each year but most other destinations have undertaken visitor surveys on only an occasional basis. The outcome from this paucity of data means many estimated figures for decisions by national and international organisations are based on sample surveys already several years old.

Options for improvements relate to:

- ◆ Undertaking visitor surveys at the very least every three years and better every two years. Is this feasible from a capacity and budgetary viewpoint?
- ◆ Can suitable training (on sample surveys) be put into the member countries (tourism administration and statistical offices) that will enable the member countries to do this?
- ◆ The emphasis is on visitor surveys but in fact sample surveys can be highly useful for many tourist statistics (e.g. returning residents), so the intention is the capability for sample surveys related to tourism. Is this feasible?

4. Industry Statistics

The collection of industry statistics varies widely throughout the Pacific region. In some countries the National Statistics Office (or similar) collects information on occupancy factors for tourism accommodation (e.g. Fiji); in some countries the Hotel Association does this (e.g. Vanuatu); in some countries there are informal groupings of hotels that share information on occupancies and achieved room rates (e.g. PNG). By contrast, in some countries, whilst there is cooperation between hotels, there is not a detailed sharing of information (e.g. Samoa). Each of the tourism industries in the different countries appears to reach a *modus operandi* that suits their particular situation.

Options for improvements revolve around:

- ◆ Is it plausible to establish regional benchmarks for occupancy factors, achieved room rates, RevPAR (Revenue per available room) etc., through the voluntary sharing of data?

5. Source Market Information

The private sector tourism industry has extensive information on their own markets. SPTO has produced a number of excellent market intelligence reports on niche markets (e.g. fishing).

The private sector has indicated their interest in obtaining information on major trends, which should be investigated at a regional level rather than at an individual business level, or individual island destination level. For example, the issue of difficulties in transiting the USA (fingerprinting, photographing etc) and how much this is impacting the Pacific islands because potential tourists from source markets such as Europe are selecting (or not) the Asia route to Australia/ New Zealand in preference to the Pacific route. A further example is the impact of terrorism in South East Asian destinations resulting (or not) in a shift to the Pacific islands as destinations for holidays for the Australian market. Also, for example, the whole issue of Pacific airline development as a topic for research.

There are seen to be a whole series of source market issues and trends that are better researched and analysed at a regional level.

Options for improvements revolve around:

- ◆ Should there be more investigation of niche markets at a regional level?
- ◆ Should there be more investigation of topics of wide regional interest at a regional level? Can these topics be identified in a timely manner?
- ◆ Could there be more shared source market research at a regional level, for example, through questions on Omnibus Surveys?

6. Tourism Satellite Accounts

As a 'topic for discussion' Tourism Satellite Accounts have been introduced into the South Pacific region with conferences and workshops, but only Fiji is in the course of attempting to put together a pilot project.

The World Travel and Tourism Council (WTTC) has done a number of simulated TSAs in the region (e.g. PNG) but there are definitional differences and methodological differences from the approaches used by the WTO/UN and other agencies. In essence the former tends to be an economic modelling exercise (mathematical equations) whilst the latter is a statistical exercise (trying to count the data) in line with the accepted System of National Accounting (SNA 1993) procedures.

The South Pacific Region is still at an early stage for TSAs. But the requirement for good economic information on tourism in order to make appropriate decisions on tourism development is even more essential in the Pacific islands than in most destinations. The role of TSAs could be highly important.

Options for the way forward revolve around:

- ◆ Can one focus on inbound tourism as a starter, leaving domestic tourism and the domestic component of outbound tourism (seen as domestic tourism) to a later date?
- ◆ Could Fiji's work on their pilot project, currently in progress, be shared with the other member destinations, recognising it as an exploratory piece of work? In fact Fiji's pilot includes inbound international tourism, domestic tourism and the domestic component of outbound tourism.
- ◆ Could we encourage two more member destinations to embark upon pilot TSAs, focusing on inbound international tourism? (for example, Vanuatu, Samoa, both of whom have recent visitor surveys giving information on tourism demand). These new pilots could also be shared with other member destinations and could help with the pilot in Fiji.

7. Regional Workshop

This Interim Review has set out a series of options for improvements and new initiatives that could be undertaken with respect to tourism statistics in the South Pacific, working under the auspices of the SPTO and the WTO.

It is now proposed that a WTO/SPTO Regional Workshop take place in early November 2005. It will bring in from all 12 countries at least two delegates each, namely a 'tourism statistician' from the 'national tourism administration' and a statistician from the National Statistical Office (NSO)(person responsible for tourism and economic statistics).

The different options for improvements/ new initiatives can be discussed and some consensus can be reached about what could be undertaken within the region by the different member countries.

The intention would be to set in motion the actual process of improving the collection, analysis and dissemination of tourism statistics to the benefit of SPTO members, to the benefit of the tourism industry, and to the ultimate benefit of the people of the South Pacific.

1. INTRODUCTION

1.1 Aims of the Assignment

The aims of this assignment are set out in the Terms of Reference (See Annex 1A), and summarised below.

The purpose of this project is to 'increase the capacity of Pacific countries to monitor and implement standardised tourism indicators and data.'

The aim is to work towards a streamlined system/procedure for the accurate compilation, classification and analysis of the most essential tourism statistics.

1.2 Approach to the Assignment

Telephone interview survey

The approach to this assignment has been to undertake a telephone interview survey with the twelve 'tourism statisticians' in the 'national tourism administrations' in the twelve member countries of SPTO, answering questions against a questionnaire / aide-memoire that was distributed to them beforehand.

The aide-memoire covers the tourism statistics under the five headings of the types of tourism statistics, namely (1) Arrivals statistics or similar; (2) Visitor Surveys or similar; (3) Industry Statistics (e.g. occupancies, achieved room rates etc.); (4) Source market surveys and data; and (5) Tourism Satellite Accounts (economic impact analyses) (See Annex 1B).

Field Visits

The telephone interview programme was supplemented by field visits to Vanuatu, Papua New Guinea, Tonga and Samoa.

Review of responses

The responses to the telephone interview have given us a good overview of what is available over the whole field of tourism statistics in the different countries. However, at this point in time, this is still an ongoing process.

The intention is to point out options for the way forward for SPTO with respect to tourism statistics, including: -

- ◆ Expanding the analysis of regional arrival statistics, for the benefit of the region;
- ◆ Introducing more visitor surveys throughout the region, but in a highly cost effective manner;

- ◆ Considering the bringing together of regional statistics on the industry and the supply of tourism facilities;
- ◆ Considering the expansion of source market investigations (trade and consumer) at a regional level, which will provide benefits to members; and
- ◆ Indicating a way forward for the development of Tourism Satellite Accounts in the region.

1.3 Reporting

This Interim Review firstly sets out the findings of the Consultant on what is happening within the region, and then secondly sets out Options for improvements or for new initiatives in the above five fields. Such options or initiatives are to be considered at a WTO/SPTO Regional Workshop to be held in early November 2005 with a view to ascertaining their practicability and desirability for being implemented.

The process of data collection is ongoing with the result that information is still coming in from the twelve member countries. However sufficient has come in to put together this Interim Review, which gives background for the participants in the forthcoming regional workshop.

Data additions will be taken into account in the Final Report due in early December 2005.

Also, it should be emphasised that the Consultant has been concerned with the 'statistical process' of collecting, compiling, analysing and disseminating the statistics but not concerned with the actual statistical numbers themselves.

1.4 Acknowledgements

The Consultant would like to extend his appreciation of the extensive assistance that he received from a wide range of persons and organisations throughout the region. Such assistance is much appreciated.

2. REVIEW OF ARRIVAL STATISTICS IN THE SOUTH PACIFIC

2.1 Background

'Border arrival statistics' is the key measure of international tourism. For all the South Pacific tourism destinations, it is the inbound international tourist that is the prime focus of interest. Domestic tourism is relatively modest in scale in all the South Pacific destinations with the exception of Fiji. However, outbound travel by South Pacific islanders is quite substantial and the domestic component of such outbound travel by the residents of the twelve member countries is of importance, especially for the regional airlines and the local travel agencies.

When the destination for this outbound travel is within the twelve member countries then it is inbound international tourism for another member country. But when the destination is outside the South Pacific islands (e.g. to Australia, to New Zealand etc.) then, clearly, expenditure is lost to the South Pacific region.

The actual arrival statistics compiled by SPTO are shown in Table 2.1

Table 2.1 - Tourist Arrivals in SPTO Member Countries, 2000-2004

Destination	2000	2001	2002	2003	2004
Cook Islands	72,994	74,575	72,781	78,328	83,333
Fiji	294,070	348,014	397,859	430,800	507,000
French Polynesia	233,326	227,658	189,003	212,767	211,893
Kiribati	4,377	4,831	4,288	3,676	2,882
New Caledonia	109,587	100,515	103,933	101,983	99,515
Niue	2,010	2,069	1,632	2,758	2,558
Papua New Guinea	58,429	54,280	53,482	56,185	59,022
Samoa	87,688	88,263	88,960	92,313	98,024
Solomon Islands	10,134	3,418	4,508	6,000	6,000
Tonga	34,694	32,386	36,585	40,110	41,208
Tuvalu	1,504	976	1,238	1,496	1,214
Vanuatu	57,591	53,300	49,463	50,400	60,611
TOTAL	966,404	990,285	1,003,732	1,076,816	1,173,260
Source: SPTO					

Note: 2003 Solomon Island figures are SPTO estimates

* 2004 Final visitor arrival figures for Fiji are FVB estimates

*2004 Final visitor arrival figures for the Solomon Islands are SPTO estimates

WTO/SPTO Conference 1988

A major exercise took place in the late 1980s on improvements to 'Tourism Statistics: Systems and Procedures' under a UNDP/WTO Tourism Development Planning and Training Project (RAS/86/134). A Conference in February 1988 (WTO/UNDP/TCSP) established a 'Minimum Requirements for Future Arrival Cards in the Pacific'. Most countries appear to have put this system into operation.

In March 1991, the Tourism Council for the South Pacific (TCSP) issued a 'Guidelines for Standardisation of Visitor Arrival Statistics in TCSP Member Countries'. This elaborated the work upon the 'Agreed Minimum Requirements for Future Arrival Cards in the Pacific' (See Annex 2A).

Comparability with the System of Tourism Statistics

The main thrust of the statistical work of the World Tourism Organisation (WTO) is to ensure that the System of Tourism Statistics (STS) falls into line with the General System of Statistics (GSS).

Two documents, approved by the United Nations, contain the existing recommendations on tourism statistics ("*Recommendations on Tourism Statistics*" and "*Tourism Satellite Account (TSA): Recommended Methodological Framework*"). The purpose of the first of these, approved in 1993, was to develop a first set of basic elements of STS, and the second relates to the design of the instrument that today is the unifying framework of most of its components, i.e. the Tourism Satellite Account (TSA), approved in 2000. Both recommendations correspond to the institutional role that the WTO assumes in statistics: the comparability of economic statistics and the development of international standards and guidelines.

The highlights of the structure of the System of Tourism Statistics (STS) are given in Annex 2B. Definitions are elaborated in Annexes 2C and 2D, and summarised in the Box.

UN/WTO Recommendations on Tourism Statistics

In the WTO/UN *Recommendations on Tourism Statistics* tourism is considered as a subset of travel. Persons engaged in tourism are called *visitors* and should be distinguished from other travellers. While traveller refers to any person on a trip between two or more places, the definition of visitor is more restrictive.

There are three criteria that distinguish visitors from other travellers. A *visitor* refers to any person:

- 1) travelling to a place other than that of his/her usual environment
- 2) for less than 12 consecutive months
- 3) and whose main purpose of trip is other than the exercise of an activity remunerated from within the place visited.

Given those criteria *international visitor* refers to any person travelling to a country other than the one in which he/she has his/her usual residence but outside his/her usual environment. *Domestic visitor* refers to any person residing in a country, who travels to a place within the

country, other than his/her usual environment. Visitors are also classified as *tourists* if they spend the night away from home, or *samedayvisitors* if they do not.

Traveller = Visitor

if trip is:

- ◆ to a place other than that of his/her usual environment
- ◆ for less than 12 consecutive months
- ◆ main purpose is other than the exercise of an activity remunerated from within the place visited

Overnight Visitor = Tourist

Same-day Visitor (including cruise passengers)

Other Travellers

(not to be included in Tourism statistics by definition or by convention), among which:

- ◆ *Border workers*: who regularly cross international borders for remunerative work
- ◆ *Direct transit passengers*: (who do not formally enter the country) who do not leave the transit area of the airport or the port, including transfer between airports and ports.
- ◆ *Temporary immigrants, permanent immigrants and nomads* (as defined by the United Nations in the *Recommendations on Statistics of International Migration*, 1980.
- ◆ *Refugees*: As defined by the United Nations High Commissioner for Refugees, 1967.
- ◆ *Members of the armed forces, representation of consulates and diplomats*: When they travel from their country of origin to the duty station and vice versa (including household servants and dependants accompanying or joining them).

2.2 Embarkation and Disembarkation Cards (ED)

ED Cards are also called entry and departure cards. Sometimes they are called arrival cards. They are the prime means for measuring international tourism in the South Pacific, and indeed worldwide.

The world-wide exercise carried out by WTO in 1998 found that the most used method for collecting inbound tourism data was by means of Entry/Departure cards, followed by visitor surveys and accommodation records. Many countries use a combination of methods. Other methods include vehicle counts or passengers' manifests of means of transport and cruise ships. Accommodation statistics were seen as having serious limitations because tourists staying in more than one accommodation are included multiple times. Also, mostly, accommodation statistics cover only collective accommodation and exclude private accommodation, and they also will miss the bulk of tourists Visiting Friends and Relatives (VFR).

FIGURE 2A

COVERAGE OF THE ENTRY/ ARRIVALS CARDS - SOUTH PACIFIC MEMBER DESTINATIONS													
	Cook Islands	Fiji	French Polynesia	Kiribati	New Caledonia	Niue	PNG	Samoa	Solomon Islands	Tonga	Tuvalu	Vanuatu	TCSP Confer.
ABOUT THE VISITOR													
Name (Family/ Surname, Given Names)	+	+			+	+	+	+	+	+	+	+	+
Permanent Address/ private address (City/State)	+	+			+	+			+		+	+	+
Passport Number (Issued at, on & expires on)	+	+				+	+	+	+	+	+	+	+
Sex	+	+	+		+	+	+	+	+	+	+	+	+
Age Group			+										
Date of birth	+	+			+	+	+	+	+	+	+	+	+
(Usual) Occupation	+	+	+		+	+	+		+	+	+	+	+
Country of (Usual) Residence	+	+	+						+	+	+	+	+
Country of Nationality/ Citizenship	+	+			+	+	+	+	+	+	+	+	+
Place/ Country of Birth					+	+	+	+	+		+	+	+
Zip Code	+	+	+										
Marital Status						+	+	+		+			
ABOUT THE JOURNEY													
Date of Arrival	+	+	+			+	+	+		+	+	+	+
Flight Number/Ship Number	+	+	+		+	+	+	+	+	+	+	+	+
Last Port of Embarkation	+	+	+		+	+	+	+	+	+	+	+	+
Port of stop after country/ next destination			+						+		+		
ABOUT THE STAY													
Intended length of stay (nights)	+	+	+		+	+	+	+	+	+	+	+	+
Sole destination or not													
Planned accommodation			+										
Address in country	+	+			+	+	+	+	+	+	+	+	+
Specify hotel/motel					+	+	+	+	+	+	+	+	+
Travel party			+										
First Visit or not			+										
Purpose of Visit (Reason for)	+	+	+		+	+	+	+	+	+	+	+	+
Planned regional visits			+										
CHOICE IN PURPOSE OF VISIT													
Holiday/ vacation	+	+	+		+	+	+	+	+		+	+	+
Business/ Official/ Conference	+	+	+		+	+	+	+	+		+	+	+
Visiting Friends or Relatives	+	+			+	+	+	+	+		+	+	+
Transit/ stopover		+				+	+	+	+		+	+	+
Other (please specify)	+	+	+		+	+	+	+	+		+	+	+
Incentive			+										
Honeymoon			+										
Sporting Activities			+		+			+					
Convention/ Conference	+	+	+					+					
Accompanying business traveller								+					
Education/training		+			+		+						
Health					+								

Notes on purpose: Fiji - Holiday is related to hotel/ resort/ dormitory. Samoa - Transits specify destination, Flight, date departing. Tonga - open-ended question. Tuvalu - Holiday is in hotel/ guesthouse.

An analysis of the Entry Cards of the SPTO member destinations (See Figure 2A) indicates that virtually all are following the minimum requirements agreed at the TCSP Conference in 1988. French Polynesia has expanded the requirements by adding really critical market segmentation questions, such as

- ◆ First time visitor
- ◆ Multi-destination visit
- ◆ Where are they going inside the country (regional visits) (See Annex 2E)

The minimum requirements of the WTO Manual (See Box) are substantially exceeded by all countries. Tuvalu has a peculiarity in that it still distinguishes between tourists staying less than 4 months and those staying more than 4 months.

EMBARKATION AND DISEMBARKATION CARDS – MINIMUM REQUIREMENTS

- ◆ Country of Residence
- ◆ Duration of Stay (intended or actual)
- ◆ Main purpose of visit (Leisure/recreation, Business, Other)

Source: WTO Technical Manual – Concepts, Definitions and Classifications for Tourism Statistics – Appendix H

For transit passengers often the distinction is not clear between the direct transit passengers (who formally do not enter the country) and the transit visitors or tourists passing through or staying in the country on their way to another country. There are some transits entering the country for a relatively short period whilst they await a connecting flight. On the other hand there are some transits making a purposive stopover whilst on an ‘across The Pacific’ trip. Data on each of these can be picked up by visitor sample surveys, but clearly they are all markedly different market segments.

Since all member countries are islands, cruise passengers are already of importance to some destinations and likely to be of importance to all. So clearly this is a field in which something needs to be done at a regional level.

2.3 Data Collection, Compilation, Analysis and Dissemination

Data Collection

Data collection in the first instance is carried out by the Department of Immigration. Mostly, it is at the international airport. The Entry Cards, as discussed above, cover the minimum requirements set by WTO and by TCSP (the forerunner of SPTO).

In general, the collecting of the entry cards appears to be reasonably well done. Of course, such data put onto the cards by the visitor that exceeds the information on the passport cannot be checked by the Immigration Officer, so everyone is reliant upon the goodwill of the visitor in entering the card accurately.

There is a suggestion that improvements could be achieved if Immigration Officers were better trained:

- ◆ To see that the data items, beyond those required for security purposes, are in fact of economic importance for the country; and
- ◆ To make a slightly more meticulous check in order to ensure that all items are filled in appropriately on the Entry Cards.

Any such training along these lines could be incorporated in the broader 'Welcome Host/ Customer Care' training that can be imparted to Immigration Officers.

Data Entry

The whole process of data entry appears to vary widely between the different countries.

For example, Fiji enters the data from both the entry card and the departure card into the computer and is able to match these up, such that the 'actual length of stay' (as opposed to the 'intended length of stay') can be calculated.

In Papua New Guinea, the data from the entry card is actually entered twice, once for immigration purposes and once for tourism purposes.



Figure 2B - Entering the data at the Tourism Promotion Authority in Port Moresby

Each country has its own process for obtaining the entry cards and then entering the data into the computer. Three institutions tend to be involved, namely the Department of Immigration, the National Statistical Office and the Tourist Organisation (sometimes the Ministry, sometimes the Tourist Office). The precise institutional set up is particular to the country.

Data entry is usually into simple desk-top computers, using a variety of programmes, including Microsoft Access, Excel, IMPS, CsiPro etc. Data analysis is then done again using standard software such as Excel.

The task varies greatly in scale from country to country. For example, Fiji has to enter the data from more than half a million cards, whilst some of the smaller destinations are entering only a few thousand cards.

Data Analysis and Dissemination

All the destinations analyse their data and then produce statistics in a monthly, quarterly and annual framework.

Data analysis, for the most part, is relatively standard and in accord with the standard statistical tables as in the agreed minimum requirements of the WTO/UNDP/TCSP Conference of 1988 (See Annex 2A).

The tourist arrival statistics are made available in a variety of means: -

- ◆ Emailing to a list of interested parties, especially monthly
- ◆ Hard copy made available to interested parties (especially for the Annual Report)
- ◆ Available statistics put on the website, including the websites of the National Statistical Office and the SPC Statistics (PRISM), based in Noumea.

Actual numbers of interested parties are not large, with few of the tourism statisticians claiming more than 50 interested parties, with a maximum of 400. The main parties interested are the private operators, other Government departments, and students, who may be researching the tourism industry.

Timing of the availability of the tourist arrival statistics varies from country to country and is not necessarily consistent.

For example, in the past Fiji has had an excellent record in terms of the speed with which the information has been made available to users – within a couple of weeks of the end of the month. Unfortunately a new system was introduced late in 2004, making two classical mistakes in the process of doing so: -

- ◆ Lack of consultation with stakeholders about their requirements; and
- ◆ Not running the old system in parallel with the new, whilst teething problems were dealt with.

2.4 Requirements of the Users

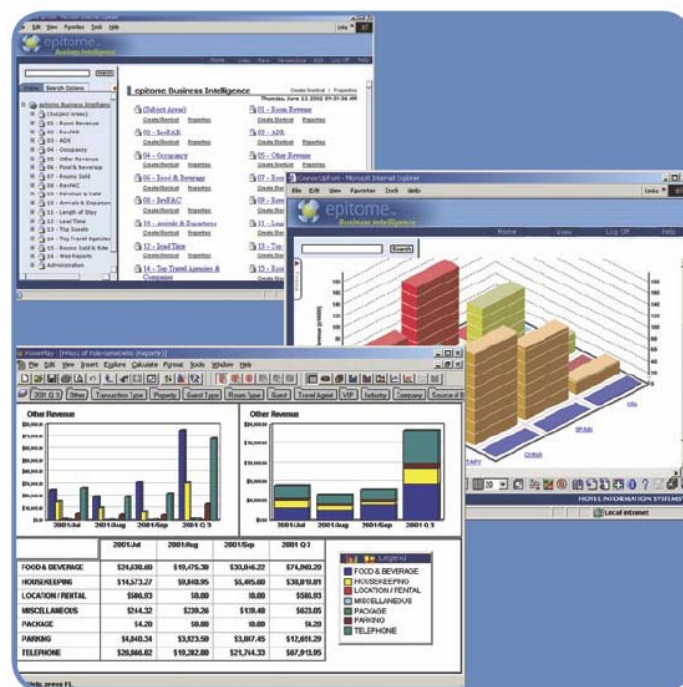
Here there are four key issues: -

- ◆ Speed of disseminating the arrival statistics
- ◆ Identification of market segments
- ◆ Source markets – geographic market segments
- ◆ Issues over the credibility of statistics

Speed of disseminating the tourist arrival statistics

The main issue here is a matter of speed. The private sector would argue that the sooner they can get the arrival statistics, so it can influence their marketing efforts, and possibly other operational decisions, to the benefit of their business and also to the benefit of the destination. This will not apply to the whole of the private sector, but it will apply to the more sophisticated and usually the larger private sector operators.

Figure 2C – Example of systems used in large hotels



Some of these operators have really powerful statistical systems within their businesses, and indeed they are able to respond to market conditions extraordinarily quickly with special offers etc. For example, weak forward bookings substantiated by the arrival statistics can trigger special offers in two months time (say) in the Adelaide market – seven nights for the price of five etc. Alternatively, the other way around, with allocations to special promotions being reduced in view of increased trade etc.

The key issue for the operator is that he knows exactly what is happening in his/her own business but he is less clear about what is happening in the destination, and perhaps even less clear about what is happening in the source markets. So data on the overall situation can be extremely valuable.

If the data is available within a couple of weeks of the end of the month, then it can influence decisions in a couple of months time. If the data becomes available in only three or four months, then it is a different type of data because it will have been overtaken by events, and by other information coming through. It is still useful but more likely to be used for specific issue analysis, where timing is not so critical, rather than for marketing or month to month managerial operations.

Identification of market segments

For the users, particularly the private sector, there is a need to clearly identify the statistical trends for different market segments, because of the differing needs of these different markets. To some extent, the increase in the information on the entry cards on the purpose of visit is an example of this issue, with some countries identifying travel specifically for conferences, specifically for sporting events etc.

From the viewpoint of the private sector, there is a key need to identify the market segments, and the trends therein, of visitors using commercial facilities. This can be difficult when there are substantial numbers of nationals residing abroad and returning to the home country.

Source markets – geographic market segments

Statistics which the private sector would find most useful is the breakdown of the country of residence data into more specific geographic market segments e.g. Sydney-Australia, Melbourne-Australia etc. Such information is indeed available when the permanent address is requested on the entry card.

Issues over the credibility of Statistics

Again the private sector is concerned about the credibility of the tourist arrival statistics, not only for themselves but also for the many partners that they have to deal with – tour operators, investors etc. Their work is made difficult if such a partner starts making the case that tourist statistics are contradictory or not in tune with observable information.

So their requirement is that the tourist arrival statistics must be in line with other information such as airline statistics, airport statistics, hotel statistics etc.

2.5 Travel Receipts and Expenditures – Balance of Payments

This subsection relates to methods used to collect data on receipts and expenditure stemming from international tourism. Often National Banks are in charge of the collection and/or compilation of this type of data in the framework of the country's Balance of Payments. Reporting takes place according to an internationally approved methodology for compiling the Balance of Payments as described in the Balance of Payments Manual (5th edition) of the International Monetary Fund (IMF).

In the Balance of Payments international tourism is reported in the items travel credit (international tourism receipts) and debit (international tourism expenditure). The item Transportation, Passengers Services relates to international fare receipts and expenditure relating to collective transport of passengers by air, road, rail or water (See Annex 6B).

Generally two systems are in use to obtain this type of data: by means of bank reporting or by means of a visitor expenditure survey or a combination of both.

In the South Pacific, it appears that the process of getting the information through the Banking system is becoming increasingly difficult because of (1) the problems of classifying transactions so as to distinguish travel, and (2) capturing some of the transactions with the proliferation of ATMs. More often the Visitor Survey and the Arrival Statistics provide the basis for an estimate of travel receipts (credits). Travel debits still tend to be collected via the Banking system but this reflects the lower level of outbound travel.

This shift in methodology puts a greater responsibility upon the Visitor Survey carried out in the destination.

2.6 Options for improvements/ initiatives

Tourist arrival statistics could be described as the core measurement for international tourism. In general the statistics are well prepared and are disseminated to interested parties, who for the most part do appreciate the statistics and use them. Issues concern: -

Co-ordination between institutions

Because there are different compilation requirements from the data on the prime collection instruments, namely the E/D card, inevitably there are a number of institutions involved in the whole process, and therefore appropriate coordination is essential. But because the twelve member destination countries are highly heterogeneous, the

appropriate institutional framework may be entirely different in each country.

Financial and capacity constraints

All the improvements and initiatives being proposed in this Interim Review are trying to take into account the realities of the capacity and the capability within the twelve member countries. Also to some extent, it is a matter of priorities for the concerned Governments. It is difficult for the Government to allocate statisticians to a tourism task, if there are other more pressing needs for statistics for another sector or purpose.

Definitional Issues

The intention in this Interim Review is to stress that any proposals for improvements to the tourism statistics should fall into line with the standards being set by WTO.

Legal Framework

The legal framework for the collection of statistics does not appear to a difficulty (for example, see Annex 2F for the Fiji Statistics Act). But, at a practical level, any statistician is in the hands of the goodwill of the respondent to give answers to the questions, whether this be an entry card, a visitor survey questionnaire, an economic census form, or whatever other data collection instrument is being used.

Lack of awareness

An intriguing issue is whether or not many of the interested parties are fully aware of the tourism statistics that are in fact available. Anecdotal evidence suggests that even though there is a relatively small number of people interested, some parties are not really aware of what is available.

Options for improvements

These relate to:

- ◆ The speed with which such statistics can be got out. Can these be produced on a consistent basis within two weeks from the end of the month, both for each member country and for the region? The essential point is that statistics produced rapidly can be used for influencing, and improving, marketing decisions/ campaigns;
- ◆ The issue of greater segmentation notably with regard to (1) the purpose of visit (mainly, who are the holiday visitors?) and (2) the use of commercial accommodation as opposed to staying with friends and relatives. Can there be statistical series, both for each member country and for the region, that indicate trends in these market segments?

- ◆ In looking at country of residence, cannot this be broken down into more significant geographical segments (e.g. there is a big difference between Melbourne as a market, and Brisbane as a market)?
- ◆ Linking up the arrival statistics with the airline statistics, because, when there are discrepancies, there is an issue of credibility for the destination in the eyes of the travel trade and in the eyes of potential investors. Can these two be reconciled especially in view of the changes that are taking place in the air travel environment in the Pacific?
- ◆ Can the entry/arrivals cards be extended in scope to cover a number of key market segments (e.g. as is done by French Polynesia)?
- ◆ Given the importance of obtaining the original information on the ED Cards, is there a case for sensitisation programmes for immigration staff to ensure that forms are filled in correctly? This would require some sort of training programmes to ensure that Immigration Staff are aware of the importance of such statistics and the significance of tourism to the economy

This Interim Review indicates that all these options are technically feasible. It is more a question of whether or not there is a will, the capacity and the budgets to do so. However, two factors that have to be borne in mind are: -

(1) the future growth in electronic passports may reduce what can be obtained by manually-entered cards (See Annex 2G); and

(2) when entry cards become large in number (e.g. 100,000+), arguably, it becomes cost-ineffective to enter data on all the cards. The Statistics Office would have to turn to sampling of the manually-entered cards.

Fiji is an exception to the latter view because it enters into the computer both its arrival cards and its departure cards, all of them. These entries are then brought together so that the actual length of stay can be computed.

At present, despite the relatively good performances by both the National Tourism Offices and the National Statistical Offices the tourism statistics as given to WTO (See Appendix 2D) do not do justice to the work that has been put in. For some countries there are a series of gaps which hinder the credibility of the statistics both for the country concerned but also for the region. This is an issue which has to be tackled and rectified.

FIGURE 2D - STATISTICS GIVEN TO WTO - 2003

	Cook Islands	Fiji	French Polynesia	Kiribati	New Caledonia	Niue	PNG	Samoa	Solomon Islands	Tonga	Tuvalu	Vanuatu
INBOUND TOURISM				(2002)					No data			
Arrivals												
Visitors '000		496		26	166					51		94
Tourists	78	431	213	5	102	3	56	92		40	1	50
Same-day visitors		45			64							
Cruise Passengers		20		21						11		44
Arrivals by purpose of visit												
Leisure, recreation & holidays	67	332	187	2	71		15	30				39
Business and professional	4	33	14	2	10		35	10				7
Other	7	66	12	1	11		6	52				4
Tourism Expenditure in the country US\$ m		537										71
Travel'		349						53		15		52
Passenger Transport'		188										19
TOURISM INDUSTRY				(2002)	(2002)	(2002)			No data	No data	No data	
Hotels and similar establishments												
Number of rooms	1152	6142	3221	162	2140	72	2830	939				10793
Occupancy Rate	60.5	56.2	58.5		57.1							35.3
Average length of stay - nights			10.8		4.4	7.0						9.5
DOMESTIC TOURISM	No data		No data	No data		No data	No data	No data	No data	No data	No data	No data
Overnight Stays in hotels and similar '000		412			240							
Guests in hotels and similar establishments '000					59							
OUTBOUND TOURISM			No data	No data		No data	(2002)	No data	No data	(2002)	No data	
Departures '000	10	104			78		92					13
Tourism Expenditure in other countries US\$ m		76										14
of which 'travel' US\$ m		63								3		12
of which 'passenger transport' US\$ m		13										2

Source: WTO Compendium of Statistics

3. REVIEW OF VISITOR SURVEYS

3.1 Introduction

Whilst this section has been called 'visitor surveys', it is concerned with the broad concept of sample surveys. Visitor surveys are the best known example of the sample surveys that can be used in acquiring information about tourism.

Within the South Pacific, the European Union underpinned the funding of many sample surveys of visitors in the late 1980s and the early 1990s. These were carried in an exemplary and rigorous manner – samples at 1500 and more, with a random selection of departing visitors at the airport. However the reduction in donor funding has meant that the pace of undertaking such surveys has slowed considerably (See Figure 3A).

However, Fiji has for many years undertaken an annual visitor survey. Bi-annual visitor surveys (two in fact, one for visitor expenditure and one for visitor satisfaction) are now undertaken by French Polynesia. Whilst In the last couple of years, visitor surveys have been carried out by Vanuatu (See Annex 3A), Samoa, Kiribati and Papua New Guinea, all with some assistance from SPTO. However, of these last four surveys the only one actually released at mid-2005 is that of PNG.

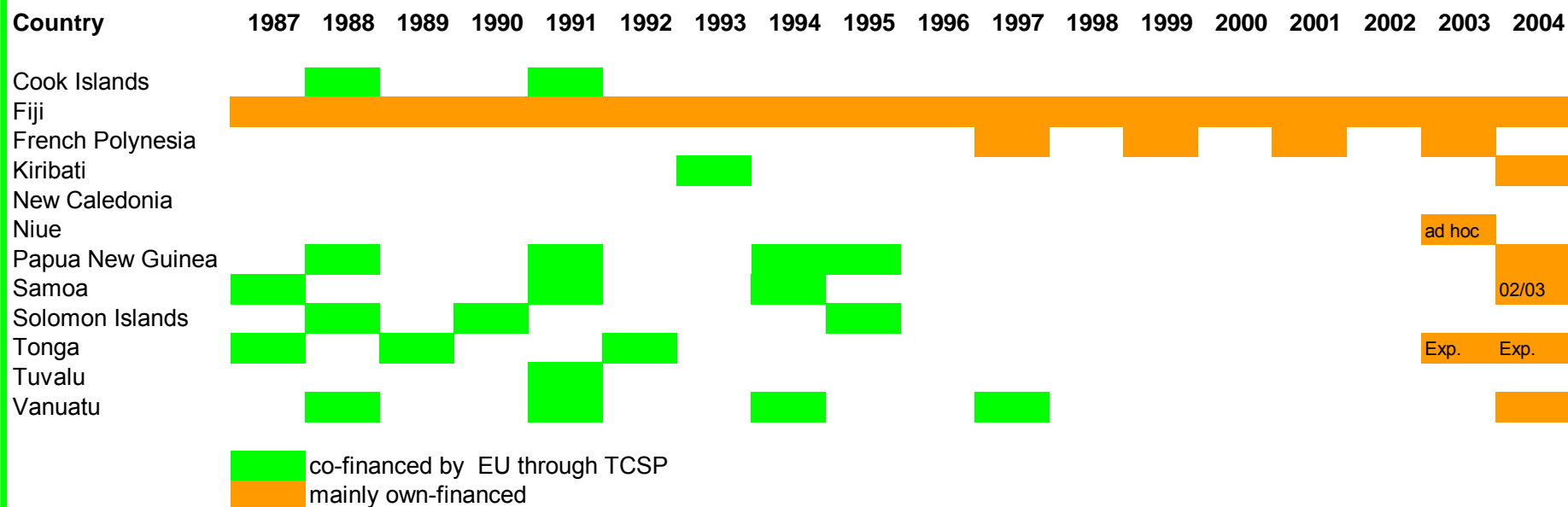
Of course, there is a difficulty in interpreting exactly what is a visitor survey. Niue, through lack of resources, are not able to do a rigorous visitor survey, but they distribute questionnaires through tourist accommodation and collect those that are filled in at the airport on the visitor's departure. Tonga distributes questionnaires in order to obtain information on visitor expenditure (See Annex 3B).

However, for most SPTO member destinations the general view is that the time lapse between the visitor surveys has been excessive. Frequently, the staff in the national tourist offices or the national accounts offices etc. are being berated by visiting officials about 'out-of-date' statistics being adjusted for excessively long periods. For example, the per diem expenditure of the visitor survey of 1997 being adjusted by the Consumer Price Index (CPI) is still being used to estimate 2004 tourism receipts for the travel account in the Balance of Payments in Vanuatu.

A recent recommendation in the Samoa Visitor Survey 2004 is that such surveys should be undertaken at least every five years. **It is the Consultant's view that visitor surveys should be undertaken every two years, and at the most every three years.**

Even five years, whilst better than ten years, is too long to ensure the credibility of the changes in the figures and to be clear about what is developing as a possible trend.

FIGURE 3A - VISITOR SURVEYS IN SPTO MEMBER COUNTRIES



Source: Telephone interviews with NTO 'tourism statisticians'

A two-year gap can work, because most people can make the anecdotal adjustment between one year and the next. Such an adjustment can be made again for a subsequent year but only with great difficulty. Beyond that it becomes impossible.

Tourism in the South Pacific is a continually changing activity – indeed a sea of changes in all sorts of fields. For examples, there are: the introduction of the lower cost airlines out of Australia and New Zealand, the rise in the cost of fuel, the security constraints in the USA and everywhere, the new investment in accommodation facilities etc. In such circumstances, it is best that both the private sector industry players and the Government departments have reasonably up-to-date information for decision-making and policy-making.

3.2 Context for Visitor Surveys in the South Pacific

Locations

Firstly, the South Pacific provides ideal locations for carrying out visitor surveys. Being islands, entry for tourists is mostly by air and mostly through a single airport. The exception is Papua New Guinea, which has a sizeable flow through a road border. Being islands there is virtually no cross-border traffic, which can often confuse the situation.

The majority of flights are international flights and therefore rather longer periods tend to be spent in departure lounges cut off from other interruptions. This makes the departure lounge an ideal location for interviewing using questionnaires (See Figure 3B).

However, it is noticeable that at some airports in the South Pacific the 'checking in' process is slow and consequently some passengers become agitated by the whole experience. Agitation in the would-be interviewee makes for a poor response. Potentially this is a source of bias, in that one would be interviewing tourists who came early to the airport and such tourists may be different to those that come late.



Figure 3B – Visitor Survey Interviewers at Nadi Airport

Budgetary Context

The reduction in donor finance resulted in the reduction in visitor surveys. There are relatively few staff in tourism statistics, either in the tourist office or the statistical bureau (we are talking about between one and a handful at the maximum). The combination of these two factors indicates that for visitor surveys to be undertaken on a regular basis, such surveys must be capable of being undertaken at a reasonable cost.

The scope for reducing the costs of visitor surveys rests with: -

- ◆ Reducing the number of questionnaires (i.e. the size of the sample);
- ◆ Reducing the period of interviewing (e.g. high and low months instead of throughout the year);
- ◆ Using less-costly outside staff such as university students, by incorporating the exercise as part of their curriculum; and
- ◆ Relying more on self-completion questionnaires and assisted-completion questionnaires, rather than 100% interviewer-filled questionnaires.

The implications of going to self-completion and assisted completion questionnaires are quite substantial in that, arguably, the maximum size for a self-completion questionnaire is around three very-easily understood pages (this will actually vary from location to location, circumstance to circumstance). So it puts a constraint on the number of questions, and therefore the information that can be secured.

3.3 Options for improvements/ initiatives

The current situation is unsatisfactory in that most of the countries have too little information and much of it is too old. It is the view of the Consultant that sample surveys will increasingly become a major source of both marketing information and economic information relating to tourism.

Options for improvements relate to:

- ◆ Undertaking visitor surveys at the very least every three years and better every two years. Is this feasible from a capacity and budgetary viewpoint?
- ◆ Can suitable training (on sample surveys) be put into the member countries (tourism administration and statistical offices) that will enable the member countries to do this?
- ◆ The emphasis is on visitor surveys but in fact sample surveys can be highly useful for many tourist statistics (e.g. returning residents),

so the intention is to raise the capability for sample surveys related to tourism. Is this feasible?

- ◆ Finding methodologies which are cost effective – more use of assisted / self-completion questionnaires, use of students at airport departure points, use of web surveys etc. What is feasible?
- ◆ Standardising parts of questionnaires (between countries) and standardising software used (e.g. SPSS). Powerful software will allow deep ‘data mining’, and also the exchange of information on visitors between countries. Can this be achieved?

All of these options have been cast as questions, in order to find a practical way forward.

4. REVIEW OF TOURISM INDUSTRY STATISTICS

4.1 Background

The collection of tourism industry statistics varies widely throughout the South Pacific region: -

- ◆ In some countries the National Statistical Office (or similar) collects information on occupancy factors for tourism accommodation (e.g. Fiji);
- ◆ in some, the Hotel Association does this (e.g. Vanuatu See Figure 4A);
- ◆ in some there are informal groupings of hotels that share information on occupancies and achieved room rates (e.g. PNG); and
- ◆ By contrast, in some countries, whilst there is cooperation between hotels, there is not a detailed sharing of information (e.g. Samoa).

Each of the tourism industries in the individual countries appears to reach a *modus operandi* that suits their particular situation.

Some private sector industries (e.g. Vanuatu) indicate that they would like: -

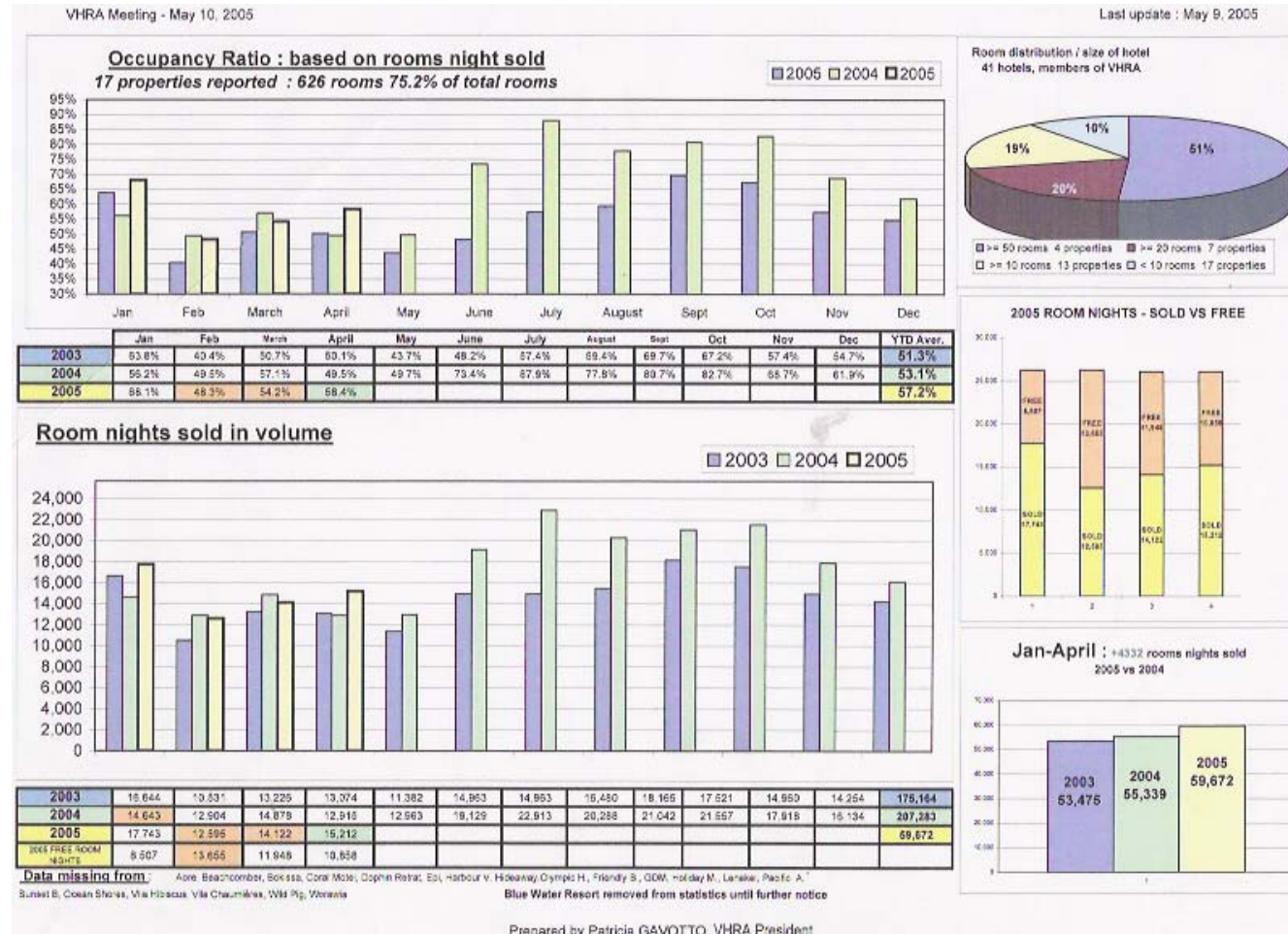
- ◆ To see the Statistics Department collecting the relevant data on hotel occupancies, but they would prefer much simpler questionnaires than the questionnaires presently proposed as guidelines by TCSP (SPTO) in Annex 4A, because of the substantial respondent burden that they impose; and
- ◆ They would be pleased to share their information with other destinations, because information on what is going on regionally will help them improve their own decision-making.

4.2 Options for improvements

Options for improvements revolve around:

- ◆ Can the NSO take on more responsibility for collecting tourism industry data than at present and will the private sector be willing to cooperate accordingly?; and
- ◆ Is it plausible to establish regional benchmarks for occupancy factors, achieved room rates, RevPAR (Revenue per available room) etc., through the voluntary sharing of data?

FIGURE 4A



5. REVIEW OF SOURCE MARKET INFORMATION

5.1 Background

Naturally, the private-sector tourism industry operators have extensive information on their own markets. Also the SPTO has produced a number of excellent source market intelligence reports on niche markets (e.g. fishing). These niche market reports appear to be well received and of use to individual operators in the region.

The private sector has indicated their interest in obtaining information on major trends, which should be investigated at a regional level rather than at an individual business level, or individual island destination level. Examples are

- ◆ the issue of difficulties in transiting the USA (fingerprinting, photographing etc) and how much is this impacting the Pacific islands because potential tourists from source markets such as Europe are selecting (or not) the Asia route to Australia/ New Zealand in preference to the Pacific route.
- ◆ the impact of terrorism in South East Asian destinations resulting (or not) in a shift to the Pacific as destinations for holidays for the Australian market.
- ◆ the whole issue of Pacific airline development as a topic for research.

There can be seen to be a whole series of source market issues and trends that should be researched and analysed at a regional level, and indeed are better researched at that level.

5.2 Options for improvements

A regional marketing strategy is now under way with SPTO. In general, South Pacific destinations are not mass market destinations, they are likely to be seeking niche markets. Such niches are likely to include:

Honeymoons	Scuba Diving
Whale watching	Fishing
Adventure	Golfing
Culture and History	Surfing and wind surfing
Eco-tourism	Sea Kayaking
Cruising	Yachting
Religion	MICE

The key aspect here is that niches such as these are often spread around a wide series of source markets.

A further aspect of importance for the South Pacific is that the destinations are not large destinations and for the most part are not able to absorb large numbers of tourists, consequently profitability is likely to come from higher added value in premium products rather than profitability through turnover. However, achieving a premium is characterised by 'doubling prices' but 'quadrupling value given' (the arithmetic is not to be taken too literally). This means highly incisive targeting at market segments in source markets that are prepared to pay 'premium prices' and want 'premium value'.

The options for improvements in source market statistics revolve around:

- ◆ Should there be more investigation of niche markets at a regional level?
- ◆ Should there be more investigation of topics of wide regional interest at a regional level? Can these topics be identified in a timely manner?
- ◆ Could there be more shared source market research at a regional level, for example, through questions on Omnibus Surveys in source markets?

6. REVIEW OF TOURISM SATELLITE ACCOUNTS

6.1 General Background

Tourism Satellite Accounts (TSA) is a national accounting procedure with the aim of presenting the tourism industry in a similar manner to the traditional industries that are usually recorded in estimating Gross Domestic Product (e.g. agriculture).

Whilst Hotels is a typical industry recorded in the national accounts, the actual tourism industry embraces a much wider range of economic activities than hotels and consequently the value-added in the hotel industry does not fully capture the economic impact of tourism.

The issue is that tourism is represented by the demand generated by visitors whilst national accounting procedures estimate the value added by different producing industries.

TSA's are a means of allocating the tourism demand into products and industries in such a way that estimates of contribution to GDP can be made that are comparable with the estimates of contribution to GDP from other industries. The TSA's are in line with the System of National Accounts (SNA) established by the United Nations and used throughout the world.

TSA's in the South Pacific

The concept of Tourism Satellite Accounts is at an early stage in the twelve SPTO member countries, and no country has as yet fully attempted such a project, although there have been some interesting pieces of work in different countries (e.g. Samoa).

For example, Fiji has embarked upon a pilot project. The date of 1995 was chosen for the pilot because, using the RAS technique, it was feasible to update an Input-Output Table to 1995 from 1993. Also Fiji has undertaken Visitor Surveys for many years, so it is feasible to obtain inbound tourism expenditure figures. In addition there are several other surveys, such as household income and expenditure surveys, that allow estimations of domestic travel to be made, as well as the usual national accounts giving breakdowns of value added by different industries.

Apart from Fiji, in several of the countries, there have been some discussions about TSA's and some staff have attended conferences and workshops. The interest in TSA's on the part of staff in the tourism office, and in the statistics office, is generally high. By contrast, at the top levels of Government, there is insufficient interest at present to allocate resources to carrying out such exercises as would be necessary to develop a TSA.

The importance of tourism in the South Pacific

However the preliminary results from some of Fiji's work suggests that total 'value added' within Fiji arising from tourism demand may be as high as 20% of GDP (including air travel). If subsequent exercises confirm this figure, the implication is so great that all Government programmes, policies and plans, even if the proposed programme appears to be far removed from tourism, would need to take into account the possible effects, if any, of such programmes upon tourism. The reason for this is that 20% value added (one fifth) as a ratio to GDP from all activities within the country means that tourism is so significant it cannot be treated lightly in Fiji or in other member countries.

WTTC Estimates

The World Travel and Tourism Council (WTTC) has done a number of simulated TSAs in the region (e.g. PNG) but there are definitional differences and methodological differences from the approaches used by the WTO/UN and other agencies. In essence the former tends to be an economic modelling exercise (mathematical equations) whilst the latter is a statistical exercise (trying to count the data) in line with the accepted System of National Accounting (SNA 1993) procedures.

Coverage of SPTO

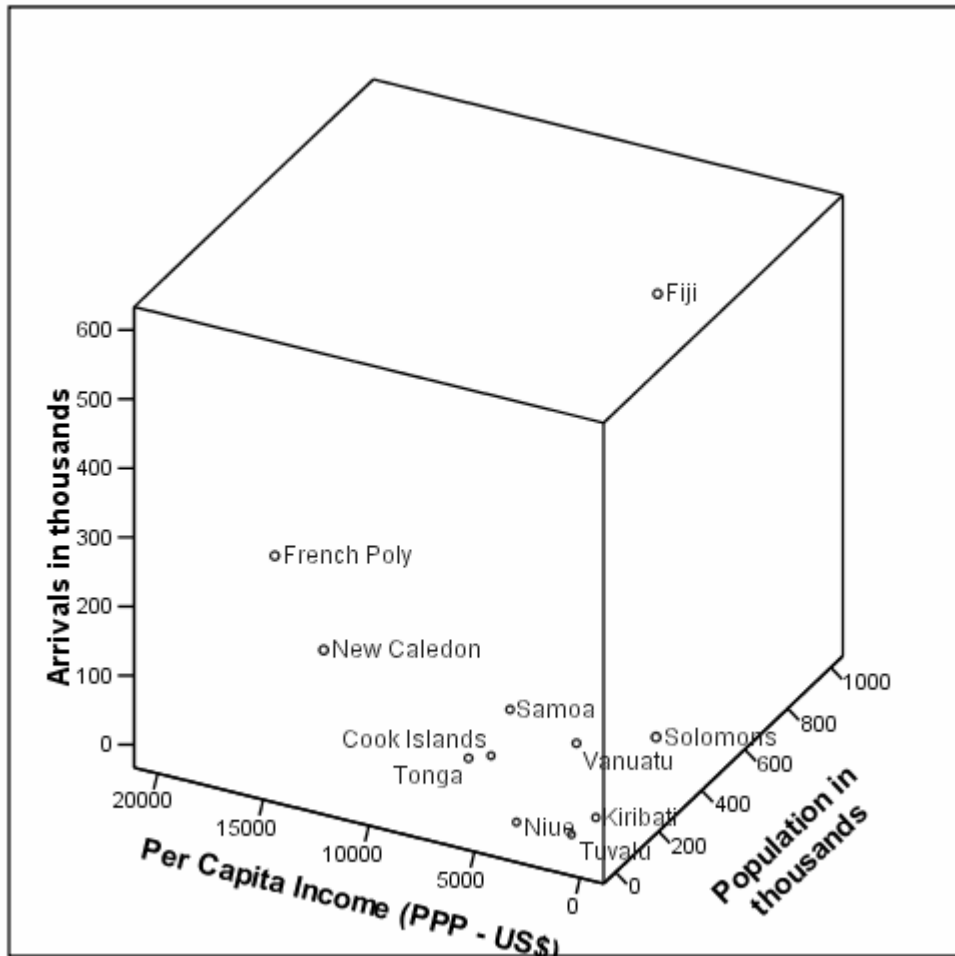
SPTO covers destination statistics for twelve countries in the South Pacific, each different with respect to population, GDP, and the scale of its tourism industry. It should be noted that SPTO has China as its thirteenth country member but not included in the following tables.

Table 6.1 - Population and GDP

Country	Population 2003 '000	GDP 2003 US\$ m	GNI per capita US\$	PPP GNI / capita \$	Arrivals 2004
Cook Islands*	21	105		5000	83,333
Fiji	835	2,251	2,630	5,410	507,000
French Polynesia	243	4580*		17500*	211,893
Kiribati	96	58	880	800*	2,882
New Caledonia	225	3158*		15000*	99,515
Niue*	2	8		3600	2,558
Papua New Guinea	5,502	3,395	510	2,240	59,022
Samoa	178	323	1,600	5,700	98,024
Solomon Islands	457	257	600	1,630	6,000
Tonga	102	163	1,490	6,890	41,208
Tuvalu*	12	12		1100	1,214
Vanuatu	210	283	1,180	2,880	60,611
TOTAL					1,173,260

Source: World Bank Development Indicators Database Sept. 2004, and CIA World Fact Book*

FIGURE 6A – THE MEMBER DESTINATIONS



There are wide differences in the characteristics of the member destinations in the South Pacific, as illustrated in Figure 6A. For example, Papua New Guinea has a population of 5.5 million (larger than New Zealand), indeed so much greater than the others that it makes it impossible to illustrate it in Figure 6A. This contrasts with Niue where the population is just a few thousand. French Polynesia and New Caledonia have per capita incomes that approach those of the industrialised countries whilst Kiribati has a per capita income below US\$ 1,000 per annum. Tourist arrivals to the South Pacific destinations vary from more than 500,000 for Fiji down to a little over 1,000 for Tuvalu. Differences between the member destinations occur in many other features. Such differences in factor endowments means that the appropriate approach to any particular issue will vary and indeed each country may have to adapt general guidelines into unique guidelines for its own circumstances.

FIGURE 6B - OVERVIEW OF THE BASIC BLOCKS OF THE TOURISM SATELLITE ACCOUNT AND RELATED INDICATORS

	GOODS & SERVICES A/C			Total	PRODUCTION A/C			INDICATORS											
	Tourism	Characteristic	Non-Tourism		Intermediate consumption	(Tourism) VA or GDP	Net Ratios	Shares Supply		GDP									
1. Tourism Industries	'Make'																		
	1a	80	1b	10	1c=1a+1b	90	1d	30	1e=1c-1d	60	1e/1c	67%	1a/1c	89%	1a/1e	133%	1c/1e		
2. Non-Tourism Industries	2a	10	2b	500	2c=2a+2b	510	2d	200	2e=2c-2d	310	2e/2c	61%	2a/2c	2%	2a/2e	3%			
3. Imports	3a	30	3b	100	3c=3a+3b	130													
4. Total Supply	4a=1a+2a+3a	120	4b=1b+2b+3b	610	4c=4a+4b	730			4e=1e+2e	370			4a/4c	16%	4a/4e	32%			
Indicators	Tourism	67%			Share of local characteristic product in total supply	12%			(1e+2e)/4c	51%									
	1a/4a				(1a+2a)/4c														
	Tourism industry share of local ch. supply	89%	Non-tourism share of local non-tourism supply	98%	Tourism related output share of total	14%													
	1a/(1a+2a)		2b/(1b+2b)		(1c+2a)/4c														
5. Visitors	'Use'																		
	5a	115	5b	35	5c=5a+5b	150													
Indicators	Visitor share of taking supply	96%	Visitor share of taking supply	6%	Visitor share of taking supply	21%	Tourism Consumption Ratios	5a/4e	5b/4e	5c/4e									
	5a/4a		5b/4b		5c/4c			31%	9%	41%									
6. Tourism Value Added	6a=5a*(1e/1c)	77	6b=5b*(2e/2c)	21	6c=6a+6b	98	TVA Ratios	6a/4e	6b/4e	6c/4e									
	alternatively							21%	6%	26%									
	6a' = 1e* (5a/4a)	58	6b'=2e*(5b/4b)	18	6c'+6a'+6b'	75		6a'/4e	6b'/4e	6c'/4e									
Indicators	Shares		Shares		Shares			16%	5%	20%									
	6a/4a	64%	6b/4b	3%	6c/4c	13%													
	6a'/4a	48%	6b'/4b	3%	6c'/4c	10%													
7. Adjustments (for taxes)																			
8. GDP																			

Source: WTO General Guidelines for developing the TSA - Measuring Tourism Supply - Figure 3.1

The building blocks of the TSA

The building blocks of the TSA are illustrated in Table 6B, taken from a WTO manual. Whilst these building blocks look complicated, the actual principle is relatively simple. It is a matter of translating visitor expenditure (a consumption concept) into value added within the local economy (an income concept). The difficulties revolve around the actual estimation procedures.

6.2 What is needed for making an estimate of a TSA (WTO/UN)

There is no definite answer to this because the establishment of TSAs is seen as an incremental process and there are still discussions about what should be the actual coverage of the TSAs.

Types of Tourism

A key breakdown is between inbound international tourism, domestic tourism and outbound international tourism (which often has a domestic component e.g. the travel agent used for the outbound trip, the airline used etc. – this domestic component is now included within domestic tourism in the TSA methodology).

The 'Tourism Satellite Account: Recommended Methodological Framework' (WTO/UN/OECD/Eurostat) puts it as follows.

Domestic Tourism	Is the tourism of resident visitors within the economic territory of the country of reference
Inbound Tourism	Is the tourism of non-resident visitors within the economic territory of the country of reference
Outbound Tourism	Is the tourism of resident visitors outside the economic territory of the country of reference

Interestingly, Fiji, in its outstanding pilot work, is tackling all three types of tourism. However, as a start point for other South Pacific destinations, it could be worthwhile just focusing upon inbound tourism, which is the 'traditional' international inbound tourism.

When the economic importance of tourism first became a topic of interest (arguably, this is attributed to a Checchi Report on the Pacific and Far East in 1961) the focus of interest was only on inbound international tourism. Expenditure by international tourists represented new money coming into the destination economy, and this new money had a dramatic stimulatory impact upon the destination economy.

So for small island destinations, which often had almost no domestic tourism and minimal outbound tourism, interest was almost exclusively focused upon international inbound tourism. For small island destinations, their outbound tourism took money out of the economy, their domestic tourism often involved merely a displacement of

economic activity, and only inbound tourism carried the real new economic stimulus, which the countries were seeking.

There is a case in the South Pacific for initially focusing efforts to develop TSAs upon ‘inbound international tourism’.

Economic Impacts

When the economic impact of tourism was first analysed, consideration was given to:

Direct impact	the direct local income generation per \$ of tourist expenditure i.e. the factor incomes generated within businesses that directly receive tourist expenditure
Indirect Impact	indirect local income generation per \$ of tourist expenditure i.e. the factor incomes generated in other businesses whose turnover is directly augmented with purchases made by the original businesses
Induced impact	Induced local income generation per \$ of tourist expenditure i.e. factor incomes generated as a result of expenditure by local residents whose income has been increased by direct or indirect income generated by the original tourist expenditure.

The impact relates to expenditure by visitors (or expenditure on behalf of visitors, for example, by tour operators). It doesn't take into account other resources such as investment in tourism facilities, use of land etc. So, as a measure of economic impact, it is focused upon the local incomes attributable to the visitor spending.

TSAs are focused upon the direct impact of tourist spending. Having said this, some of the TSA assessments have included for the indirect impact (e.g. New Zealand). Indeed the indirect impact is as large as the direct impact.

There are detailed definitional difficulties in deciding what is direct and indirect. To estimate the indirect impact requires more data than for the direct (basically an input-output matrix for the economy).

Fiji, in its pilot work, is tackling both direct and indirect impact. However, as a start point for other South Pacific destinations, it could be worthwhile just focusing upon the direct impact.

Data Constraints

The ongoing exercise by Professor Simon Milne illustrates some of the difficulties encountered in trying to estimate the economic impact of tourism.

Data Constraints for economic impact assessment

- A lack of up-to-date data on visitor expenditure represents a problem in some cases, for example some countries rely on visitor expenditure data from the early 1990s and updated with changes to the CPI.
- Even where recent departure surveys exist they cannot account for cruise-ship related impacts or some elements of pre-paid visitor expenditure. In other cases the data has been gathered with insufficient opportunity or skill base to allow for analysis.
- It is extremely difficult to get information related to tourism employment due to issues of data collection and also definition.
- While company and departure tax information is relatively easy to find other tourism related government revenue (e.g. duties, levies) are difficult to estimate.
- The lack of up-to-date information on industry cost structures and household expenditure means that attempts to estimate indirect and induced elements of visitor spend impacts are impossible to achieve with any level of certainty

Source: The Economic Impact of Tourism in SPTO Member Nations - Draft Final Report - July 2005 - SPTO

What is required to measure the direct impact of inbound tourism?

The direct impact is essentially the local incomes directly deriving from tourist expenditure in the destination country. The local incomes broadly equate with the value added part of the direct local supply to service the tourist expenditure in the destination country.

The difficulty essentially revolves around the fact that statistics on value added are mainly arrived at from surveys on producers in particular industries, and this doesn't easily match with tourist expenditure which can be on a whole range of products/services in different industries.

If one takes the view that to start the Tourism Satellite Accounts, it is best to focus upon inbound international tourism and to focus upon the direct impact, then the following data is needed: -

Data Required	Research Instrument
DIRECT IMPACT	
(a) Estimate of annual tourism inbound spending (consumption / demand)	(a1) Visitor Sample Survey (probably airport departures).
	(a2) Supplemented by sample survey of cruise ship passenger (and crew) expenditure ashore

	(a3) Ad hoc research survey with the travel trade (tour operators, accommodation etc.) into price of prepaid packages (through visitor survey), to ascertain what is paid into the destination. Same research to assess margins.
	(a4) Tourist Arrivals and Tourist Nights throughout the year, in order to gross up the visitor survey estimates to a total for the year. The sample may need adjustments to make the sample estimates applicable to a year.
(b) Breakdown of the tourist expenditure into products/services (e.g. accommodation etc.)	(b1) Breakdown of expenditure should be obtained in the Visitor Sample Survey and Cruise Passenger Sample Survey
	(b2) Allocation of 'product' expenditure into tourism characteristic products, connected products and non-specific products – ad hoc research exercise
(c) Allocation of product expenditure to production account industries	(c1) Ad hoc research exercise to allocate product expenditure to industries where one can identify the value added breakdown, thus apportioning the visitor demand
INDIRECT	To estimate the indirect impact, it is necessary to know much more about the intermediate inputs – where they came from, what their breakdown is into intermediate inputs, value added etc, is. Basically one needs an economic census or survey from which one can draw out a purposive sample of producers (See Annex 6A).

However, if a start is made by focusing upon the inbound tourism and upon the direct impact, then it means that one would be focusing upon only four of the ten tables of the TSA, namely 1, 4,5, & 6.

Table 6.2 - Tables in the Tourism Satellite Accounts

No.	Title of Table	Key Content
1	Inbound tourism consumption by products and categories of visitors	Characteristic products, connected products, non-specific products by same day visitors, and tourists
2	Domestic tourism consumption by products and ad hoc sets of	Characteristic products, connected products, non-specific products by resident visitors travelling domestically

	residents	and outbound
3	Outbound tourism consumption by products and categories of visitors	Characteristic products, connected products, non-specific products by same day visitors, and tourists
4	Internal tourism consumption by products and types of tourism	Internal tourism consumption (inbound plus domestic) plus consumption in kind
5	Production accounts of tourism industries and other industries	Output, imports, intermediate consumption, value added, taxes less subsidies, compensation of employees, gross operating surplus
6	Domestic supply and internal tourism consumption by products	Output & tourism share, Characteristic products, connected products, non-specific products, imports, intermediate consumption, value added, taxes less subsidies, compensation of employees, gross operating surplus
7	Employment in the tourism industries	Establishments, jobs, status in employment, number of employed persons
8	Tourism gross fixed capital formation of tourism industries and other industries	Tangible fixed assets, intangible fixed assets, improvement of land
9	Tourism collective consumption by functions and levels of government	National, regional , local
10	Non-monetary indicators	Trips and overnights (inbound, domestic and outbound) Arrivals and overnights by transport (inbound) Establishments and capacity Establishments and employment

Another issue that has to be resolved is whether or not to include the expenditure on international travel in the TSA, particularly when this international travel is provided by a domestically based airline e.g. Air Pacific (See Annex 6B).

6.3 Options for going forward

The South Pacific Region is still at an early stage for TSAs. But the requirement for good economic information on tourism in order to make appropriate decisions on tourism development is even more essential in the Pacific islands than in most tourist destinations. The role of TSAs in the South Pacific destinations could be highly important.

Options for the way forward revolve around:

- ◆ Can one focus on inbound tourism as a starter, and leave domestic tourism and the domestic component of outbound tourism (also seen as domestic tourism) to a later date?
- ◆ Could Fiji's pilot work, currently in progress be shared with the other member destinations, recognising it as an exploratory piece of work? In fact Fiji's pilot includes inbound international tourism, domestic tourism and the domestic component of outbound tourism.
- ◆ Could we encourage two more member destinations to embark upon pilot TSAs, focusing on inbound international tourism? (for example, Vanuatu, Samoa, both of whom have recent visitor surveys giving information on tourism demand). These new pilots could also be shared with other member destinations and would maybe help with the pilot in Fiji.

For another two countries to start upon pilot projects, the immediate possibilities might be: -

- ◆ Papua New Guinea
- ◆ Samoa
- ◆ Vanuatu

Also New Caledonia and French Polynesia may have the majority of the statistical base to make such a start.

Costs of establishing a TSA

The costs in establishing a TSA have been relatively high, especially for a large economy such as the USA or Australia. The preliminary estimates by Australia for establishing a TSA were as in Figure 6B.

This total figure of A\$ 920,000 appears to make the exercise very costly for a small economy. But these costs can be scaled down in the context of a small economy. For example, one is talking about relatively few supplying industries and enterprises for the bulk of tourism supply in a small economy, whereas in the USA (say), one is talking of a massive economy – in numbers of suppliers, in geographic coverage etc. Of course, the USA is able to secure many cost economies in obtaining information through the use of sampling techniques, but then for a small economy some similar cost savings are possible and the scale is so much smaller that the total costs will be much smaller.

Figure 6B – Costs of establishing TSA in Australia

Costs

34. The total cost of the development and production of the ATSA is estimated at \$920,000. This cost will be spread over the years 1996-97 to 2000-2001. The following table summarises the costs by year. Attachment 2 provides more detail of the costings, including those for additional data collections.

Item	1996-97	1997-98	1998-99	1999-00	2000-01	Total
Data collection: Demand side		\$60,000				\$60,000
Data collection: Supply side	\$50,000	\$70,000	\$335,000			\$455,000
Other salaries	\$15,000	\$30,000	\$80,000	\$180,000	\$50,000	\$355,000
Computing			\$10,000	\$20,000		\$30,000
Miscellaneous			\$5,000	\$15,000		\$20,000
Total	\$65,000	\$160,000	\$430,000	\$215,000	\$50,000	\$920,000

* Bureau of Tourism Research data collections.

35. These costs cover the production of one ATSA only, i.e. for the reference year 1997-98. To enable the ATSA to be updated on an annual basis, it is estimated that the approximate future costs would be around \$100,000 per year for salaries and approximately an additional \$300,000 every third year for extra data collection.

Clearly it is essential to establish a less costly mechanism for building up the tourism satellite accounts each year.

There are suggestions that interim indicators might be easier to obtain than the Tourism Satellite Accounts (See Annex 6C). Even Canada which has been a leader in establishing TSAs has taken the view that annual TSAs are too costly to implement and that interim indicators may be necessary.

These issues require consideration in the context of the South Pacific.

7. PROPOSED REGIONAL WORKSHOP

7.1 Introduction

This Interim Review has set out a series of options for improvements and initiatives that could be undertaken with respect to tourism statistics in the South Pacific, working under the auspices of the SPTO and the WTO.

It is now proposed that a WTO/SPTO Regional Workshop take place in early November 2005. It will bring in from all 12 countries at least two delegates each, namely a 'tourism statistician' from the 'national tourism administration' and a statistician from the National Statistical Office (NSO)(person responsible for tourism and economic statistics).

In order to cover the whole range of tourism statistics, it is essential, in the view of the consultant, that there is a good working relationship between the NTO's 'tourism statisticians' and the Bureau of Statistics. Both need each other's expertise in order to make good progress because of the wide range of expertise required – national accounting procedures, sample surveys, sampling frames, the intricacies of the tourism industry etc.

7.2 Suggested Programme of the Regional Workshop

The intention is that this regional workshop will discuss the proposed options for new data collection systems. Also It would have an element of training for the delegates.

The different options for improvements/ new initiatives can be discussed and some consensus can be reached about what could be undertaken within the region by the different member countries.

The intention would be to set in motion the actual process of improving the collection, analysis and dissemination of tourism statistics to the benefit of SPTO members, to the benefit of the tourism industry, and to the ultimate benefit of the people of the South Pacific.

From discussions with SPTO and other parties, it is felt that the workshop should cover three days, because of the large number of topics to be covered, and because of the need for the different member countries to hear what fellow members are doing about different aspects of tourism statistics. So, overall the workshop will be a highly participatory exercise.

The following is just a preliminary suggestion, but it indicates the coverage intended in the workshop. A detailed time allocation for the workshop is shown in Table 7.1.

Main Sessions in the Regional Workshop – Tourism Statistics

Day	Session	Topic
One	1	(a) Explanation of the Three Day Programme and Overview of Tourism Statistics in the Region (b) Overview of tourism statistics in Fiji
	2	Role of SPTO in Tourism Statistics – Introduction
	3	Arrival Statistics in the Region – Country Presentations
	4	Arrival Statistics – Options for the Future
Two	5	Visitor Surveys - A Training Session
	6	Visitor Surveys – Options for the Future
	7	Industry Statistics – Overview and Options
	8	Source Market Information – Overview and Options
Three	9	Tourism Satellite Accounts - A Training Session
	10	(a) Fiji Presentation on their Pilot TSA Programme (b) TSAs - Options for the Future
	11	Role of SPTO in Tourism Statistics – Conclusions
	12	Conclusions of the Workshop on the Way Forward for Tourism Statistics in the South Pacific

The broad intention is to utilise Fiji's experiences to date on both its Pilot TSA project and its use of their annual visitor survey to convey to the South Pacific audience the realities of the statistical processes in the region.

Also, giving each member country the opportunity to outline what they are doing on tourism statistics will add breadth to the experience of each of the participants.

7.3 The Options for the Role of SPTO in Tourism Statistics

Review of the PRTDP

The Pacific Regional Tourism Development Programme (PRTDP) was reviewed in October 2003. The key findings made with regard to Research and Statistics was that the role for SPTO, in the future, should be one of being a facilitator of research and statistical information, focusing on being an information gathering, collation and dissemination agency rather than a research-focused one.

The new SPTO that has emerged since 2001 is largely following these recommendations. This is evidenced by the excellent Marketing Intelligence Reports put out by SPTO and their wide dissemination, as well as by the relatively rapid turnaround on quarterly and annual statistics e.g. the Annual Statistical Report for 2003 coming out in April 2004.



Report
on
2003 Visitor Arrival Statistics

April 2004

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Since 2001 SPTO has been transformed into a private-sector-led organisation, now serving 130 members, and relying on membership subscriptions. Inevitably, such a change has meant that SPTO has had to carefully consider the cost-effectiveness of its statistical initiatives and the 'added value' of such statistics to its members.

Issues

A critical issue to be considered at the workshop concerns the appropriate role for the SPTO in the collection, compilation, analysis and dissemination of regional statistics.

This role could be considered under a whole range of different headings, including the following: -

- ◆ Coordination of statistical efforts between member countries;
- ◆ Delivery of training in statistical methods;
- ◆ Coordination between airline statistics and tourist arrival statistics;
- ◆ Market Segmentation statistics that will be beneficial to all countries;

- ◆ Identification and analysis of niche markets of value to all member countries;

The Region

One aspect that will need to be considered at the regional workshop is the issue of ‘what is the region?’ and what does an aggregate regional statistic actually mean.

There are several South Pacific regional organisations, all with a somewhat different regional coverage. A similar consideration needs to be given to the very interesting regional statistics programme under SPC, called PRISM and located in Noumea.

Table 7.1 – Draft Programme for the Regional Workshop

‘This Regional Workshop brings together participants from the regional member destinations who are concerned with the collection, compilation, analysis and dissemination of tourism statistics – covering arrival statistics, visitor surveys, industry statistics, source market data and tourism satellite accounts.

An Interim Review Report has been prepared by the Consultant in which, apart from the review, a number of options for improvements and new initiatives have been put forward for discussion by all participants in the course of this Workshop.’

REGIONAL WORKSHOP ON SOUTH PACIFIC TOURISM STATISTICS

Time	Topic & Date	Presenters
	MONDAY 7TH NOVEMBER	
8.30	Registering Participants: Location – Fiji	
9.00	Welcome from CEO of SPTO Introduction to Regional Workshop by Technical Advisor	CEO SPTO SPTO TA
	First Session – Overview	
9.15	Presentation – Explanation of the Three Day Programme by Consultant and Overview of Tourism Statistics in the Region	Consultant
	Presentation – Overview of Tourism Statistics in Fiji – ARRIVAL STATISTICS	Ministry of Tourism, Fiji
	Open discussion	
10.45	Coffee Break	
	Second Session – Role of SPTO, introduction	
11.15	Current Role of the SPTO in Tourism Statistics	SPTO Statistician
	Open Discussions	
12.00	Country Presentations on their tourism statistics	Country NTOs
13.00	Lunch	

Time	Topic & Date	Presenters
	Third Session - Arrival Statistics in the Region	
14.00	Country Presentations on their tourism statistics	Country NTOs
	Open discussion	
15.15	Tea Break	
	Fourth Session – Arrival Statistics – Options for the Future	
15.45	Presentation: <ul style="list-style-type: none"> ◆ Delivery of arrival statistics in two weeks ◆ Segmentation and delivery of new series (notably purpose of visit, use of commercial accommodation) ◆ Extending the entry/arrivals card ◆ Link with the airline statistics ◆ Giving more details on the country of residence (e.g. Melbourne, Brisbane rather than just Australia) ◆ Immigration sensitisation programmes 	Consultant
	Open Discussion	
17.00	Close by Technical Advisor	SPTO TA
	TUESDAY 8TH NOVEMBER	
	Fifth Session – Visitor Surveys	
9.0	Training Presentation – Visitor Surveys	Consultant
	Question and Answer session	
10.45	Coffee Break	
	Sixth Session – Options for the Future for Visitor Surveys	
11.15	Presentation – Using the Fiji Visitor Survey	FVB
	Presentation – Options for the Future <ul style="list-style-type: none"> ◆ Visitor surveys every three years (relatively standardised) ◆ Training and assistance organised by SPTO in order to raise capability and capacity for doing sample surveys 	Consultant
	Open discussion	
13.00	Lunch	
	Seventh Session – Industry Statistics	
14.00	Presentation – Overview and Options for the Future: <ul style="list-style-type: none"> ◆ Establishing regional benchmarks (e.g. occupancy factors) 	Consultant
	Open Discussion	
15.15	Tea Break	

Time	Topic & Date	Presenters
	Eighth Session – Source Market Information	
15.45	Presentation - SPTO Exercises	SPTO Statistician
	Options for the Future <ul style="list-style-type: none"> ◆ Extending the regional analysis by SPTO of niche markets ◆ SPTO analysis of specific regional issues with a scheme to identify these issues 	Consultant
	Open Discussion	
17.00	Close by Technical Advisor	SPTO TA
	WEDNESDAY 9TH NOVEMBER	
	Ninth Session – TSAs	
9.00	Training Presentation – Tourism Satellite Accounts	Consultant
9.45	Question and Answer Session	
10.00	Presentation of their Pilot TSA – Fiji	Ministry of Tourism, Fiji
10.30	Question and Answer Session	
10.45	Coffee Break	
	Tenth Session – TSAs	
11.15	Presentation: TSA – Options for the Future <ul style="list-style-type: none"> ◆ Fiji Pilot to be shared with SPTO members ◆ Two more countries to initiate pilots, say, from Samoa, Vanuatu, PNG, French Polynesia, New Caledonia 	Consultant
	Open Discussion	
13.00	Lunch	
	Eleventh Session – Role of SPTO in Tourism Statistics	
14.00	Presentation by SPTO Technical Advisor	SPTO TA
	Open Discussion	
15.15	Tea Break	
	Twelfth Session – Conclusions and Recommendations of the Regional Workshop	
15.45	Presentation – Summary of Findings that will be taken forward for consideration for the Final Report	Consultant
	Open Discussion	
16.45	Summing up of Workshop	SPTO TA
17.00	Closing Remarks by CEO of SPTO	CEO SPTO