

Getting Started

**TSA READINESS ASSESSMENT
PRELIMINARY FINDINGS**

Presentation Format

- Rationale/Objectives
- Approach/Methodology
- Readiness Criteria
- Findings
- Summary

Rationale

- Several initiatives
- Multiple projects
- Funded from various sources
- Countries at different stages of implementation
- Use of different methodologies
- Need for co-ordination of activities

Overall Objective

To assist countries in enhancing their tourism **research capacity** through the introduction of a more reliable and accurate system for **measuring the tourism's contribution** to economic growth and socio-economic development.

Specific Deliverables

- Construct objective readiness criteria and undertake a review mission, via field visits and desk reviews, to determine the various states of readiness for TSA implementation in the Caribbean
- Liaise with the National Statistical Offices (NSO) and National Tourism Organizations (NTO) to obtain a clear indication of the levels of statistical systems development, institutional understanding, commitment and interest in TSA implementation
- Document the constraints and limitations, at both the country and regional levels, to successful, effective, sustainable implementation of TSA systems
- Determine on a country by country basis the technical needs, administrative and human resource requirements, estimated budget and time lines, and structural reforms necessary for introduction and establishment of a successful TSA
- Recommend a workable approach, appropriate methodology and an actual implementation plan for the successful introduction and development of TSAs in the Caribbean.

Geographical Coverage

For purposes of this project the “Caribbean” is restricted to those member countries of CARIFORUM, which are:

Antigua and Barbuda
The Bahamas
Barbados
Belize
Dominica
The Dominican Republic
Jamaica
Grenada
Guyana
Haiti
St. Kitts and Nevis
St. Lucia
St. Vincent and the Grenadines
Suriname
Trinidad & Tobago.

Approach

- Literature review
- Review methodologies
- Visit to documentation centre – CTO
- Mission – 5 countries (Bahamas, Barbados, DR, St Lucia, T&T)
- Telephone interviews
- Assessment tool (questionnaire)

TIMELINE: 15 WEEKS

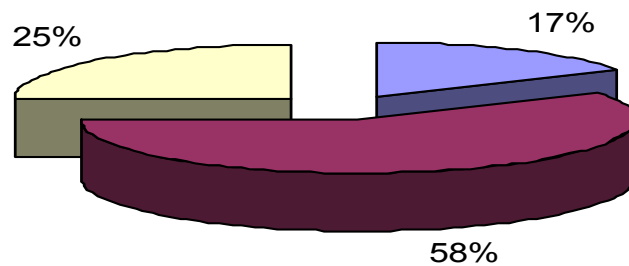
Methodology

- All countries subscribed to UNWTO RMF
- Though some divergence ... there is convergence
- UNWTO TSA RMF is **the standard**
- Robust, credible, widely used
- Allows for comparability across sectors within the country
- Facilitates cross country comparisons

Readiness Criteria

- **Status of TSA Project**
- **Functional inter-agency Collaboration**
- **Conversion to SNA 93**
- **Production of Supply and Use Tables**
- **Assessment of the System of Tourism Statistics**
- **Completion of the 10 TSA Tables**
- **Level of TSA Awareness**

Status of TSA Implementation




Snapshot of TSA Project

COUNTRY	STARTED	NOT STARTED	COMPLETED
Antigua and Barbuda		X	
Bahamas	X		
Barbados		X	
Belize		X	
Dominica		X	
Dominican Republic			X
Grenada		X	
Guyana		X	
Haiti		X	
Jamaica	X		
St. Kitts and Nevis		X	
St. Lucia	X		
St. Vincent and the Grenadines		X	
Suriname		X	
Trinidad & Tobago	X		

Inter-Agency Collaboration

- Critical – one of prerequisites
- Comprises all key tourism stakeholders (minimum agencies responsible for tourism statistics)
- Formal/Informal?
- Effective/Functional
- Challenges – issues of turf, duplication, control resultant waste of resources
- Choose easy way out



Why don't we just talk?

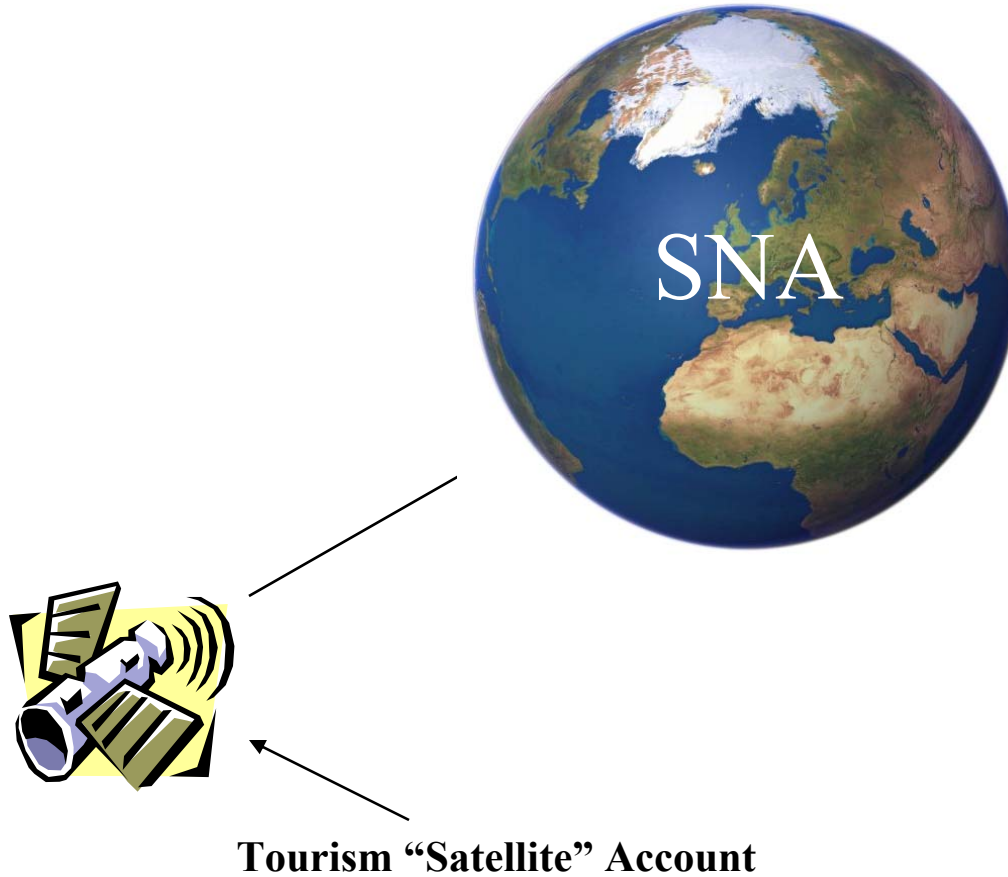
Inter-Agency Collaboration

Findings:

- Some collaboration – informal, not vibrant as indicated yesterday
- Turf/duplication of efforts
- Roles not clarified
- Issues of disparities in resource endowments, remuneration schemes and institutional culture
- Some questionnaires completed without collaboration – I was referred to the other agency

Only 3 countries said yes!

The Tourism Satellite Account (TSA)



Conversion to SNA 1993

- New system includes satellite accounts within the framework
- Consistency within the national accounts
- UN Stats Committee 2006 Report indicated that CARICOM performed worse than developing countries as a whole
- Perhaps low response rate

10 countries have started process

Supply and Use Tables

- Heart of the TSA
- UNWTO RMF states that a full-fledged TSA must have a fully reconciled SUT

Started SUT

Bahamas
St Lucia
Dominica
St Vincent
Jamaica

Completed SUT

Dominican Republic
Trinidad and Tobago

System of Tourism Stats: Example

DEFINITION OF VISITORS	YES	NO
Foreign student for an academic year	8	3
Accompanying family of such a student	9	2
Foreign student for more than an academic year	8	3
Accompanying family of such a student	5	6
Accountant (short term consultant)	8	3
Information technology consultant	8	3
Person visiting for medical treatment	11	0
Person in transit	3	8
Person coming for a short term, working with an international organization	3	8
Crew on an air carrier	8	2
Person coming to stay in his/her second home	9	2

System of Tourism Statistics

- Difficult one to assess
- Not determining quality – outside scope
- Some information on what is produced
- A determination was made about the availability of statistics to begin the TSA process
- For instance – can't really start a TSA without expenditure data – exit surveys important
- From initial assessment – very basic data are not produced, quality needs to be enhanced, duplication – various data sources and methodologies need to be harmonised – role for CTO ?
- Correlation between duplication in data production and no inter-agency collaboration
- Jury still out – preliminary category of adequate/inadequate

10 TSA Tables

- UNWTO RMF centred on the compilation of 10 TSA Tables
- Incremental approach
- Collaboration required

Only Dominican Republic has produced the 10 Tables
5 countries had started
7 not yet started

The Tourism Satellite Account (TSA)

The TSA can provide information on:

- Tourism's contribution to the economy
- Industries that benefit from tourism
- The amount of tax generated from tourist activity
- Data relative to visitor demand
- Improved knowledge concerning jobs generated by tourism

Actionable intelligence for informed policy-making
Framework for impact analysis

TSA Awareness

- TSA new tool
- Level of awareness low generally
- Not adequate among tourism stakeholders
- If policy makers and tourism stakeholders are not aware of the advantages in setting up TSAs then they may not support it
- One NTA indicated it was a waste of time
- Awareness campaign using various media

Response

Very good – 0

Good – 6

Poor – 6

Summary of Readiness Criteria

COUNTRY	Started TSA Project	Inter-Agency Collaboration	Conversion SNA 93	Started SUT	Tourism Statistics	10 TSA Tables	Level of Awareness
Antigua and Barbuda	NR	NR	NR	NR	NR	NR	NR
Bahamas	yes	yes	yes	yes	adequate	8	good
Barbados	no	no	yes	no	adequate	0	good
Belize	NR	NR	NR	NR	NR	NR	NR
Dominica	no	no	yes	no	inadequate	0	poor
Dominican Republic	yes	yes	yes	yes	adequate	10	good
Grenada	no	no	yes	no	inadequate	0	poor
Guyana	no	no	no	no	inadequate	0	good
Haiti	NR	NR	NR	NR	NR	NR	NR
Jamaica	yes	yes	yes	yes	adequate	1	good
St. Kitts and Nevis	no	no	yes	no	adequate	0	poor
St. Lucia	yes	no	yes	yes	adequate	3	good
St. Vincent and the Grenadines	no	no	yes	yes	adequate	0	poor
Suriname	no	no	no	no	inadequate	0	poor
Trinidad & Tobago	yes	no	yes	yes	adequate	6	poor

NR - indicates no response

Where do we go from here?

- Say thank you
- Fill gaps
- Get some feedback
- Have some consensus on the way forward and specifically
 - Work on an implementation strategy and plan for the region

Thank You



TSA IMPLEMENTATION PLAN


COUNTRY IMPLEMENTATION PLANS

Implementation Strategy

- Broad strategy should involve various stakeholders including – UNWTO, CARICOM, CTO
- Structure of relationships and roles to be finalised
- Technical leadership – UNWTO and CARICOM
- CTO – facilitative, System of Tourism Statistics

Some initial thoughts

- Set up TSA project team
- Determine who is the driver, technical head (sometimes good to separate management)
- Assess available information
- Determine project scope
- Determine resources – staffing, administrative, IT, technical assistance...
- Set deliverables and timelines



What gets measured gets done!

What you need to do...

- Brief description of tourism industry
- List of key tourism statistics produced
- Determine who is going to be involved and their roles
- Draw simple organization chart
- Determine project scope – feasibility study, pilot, full TSA, review, finalisation
- Complete implementation plan for your TSA project

IMPLEMENTATION PLAN

ACTIVITIES	RESPONSIBILITY	TIMEFRAME	REQUIREMENTS
SET UP INTER-AGENCY PLATFORM	MINISTRY OF TOURISM	3 MONTHS	CABINET NOTE/MOU/MEETING
REVIEW SYSTEM OF TOURISM STATISTICS			\$\$\$