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.
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

- 58% STARTED
- 25% NOT STARTED
- 17% COMPLETED
### Snapshot of TSA Project

<table>
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<tr>
<th>COUNTRY</th>
<th>STARTED</th>
<th>NOT STARTED</th>
<th>COMPLETED</th>
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<td>X</td>
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<tr>
<td>Trinidad &amp; Tobago</td>
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</tbody>
</table>
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!
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
### Definition of Visitors

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<td>3</td>
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<tr>
<td>Accompanying family of such a student</td>
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</tr>
<tr>
<td>Foreign student for more than an academic year</td>
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<tr>
<td>Accompanying family of such a student</td>
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<td>Accountant (short term consultant)</td>
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<td>Person coming for a short term, working with an international organization</td>
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<tr>
<td>Crew on an air carrier</td>
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<tr>
<td>Person coming to stay in his/her second home</td>
<td>9</td>
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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 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

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>Started TSA Project</th>
<th>Inter-Agency Collaboration</th>
<th>Conversion SNA 93</th>
<th>Started SUT</th>
<th>Tourism Statistics</th>
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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
<table>
<thead>
<tr>
<th>ACTIVITIES</th>
<th>RESPONSIBILITY</th>
<th>TIMEFRAME</th>
<th>REQUIREMENTS</th>
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<td>REVIEW SYSTEM OF TOURISM STATISTICS</td>
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