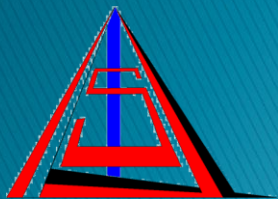


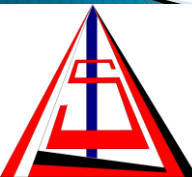
Tourism Satellite Account State of the Industry Conference, Martinique

*Presented by: Carol Coy
Director General
Statistical Institute of Jamaica
October 14–18, 2013*



INTRODUCTION

- ▶ The importance of statistical information in today's global economy cannot be overstated or should not be underestimated
- ▶ One writer puts it *"If you can't measure it, you can't manage it"*.



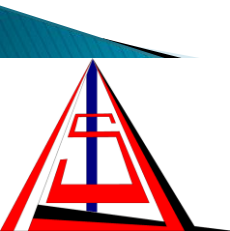
INTRODUCTION

- ▶ The impact of tourism is felt on the economy, the local population, the environment, government and the visitors themselves
- ▶ Tourism is an internationally traded service – significant export earner for most Caribbean countries



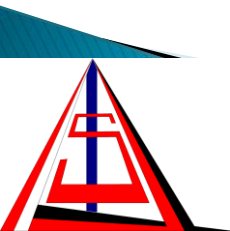
Importance of Tourism Statistics

- ▶ Statistics on tourism is therefore necessary to assess the industry's full impact throughout the economy
- ▶ This will allow for evidenced based policy and decision making
- ▶ In the Caribbean however most tourism indicators have traditionally been non-monetary; e.g. arrivals, bed nights, number of rooms, occupancy rates



Importance of Tourism Statistics

- ▶ Data on tourism expenditure are available in some countries
- ▶ This type of information however is not sufficient to develop sound economic analysis of the industry



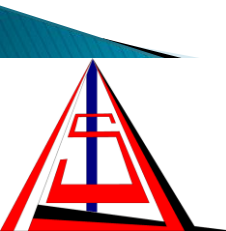
Importance of Tourism Statistics

- ▶ Reliable tourism statistics and analysis of its economic contribution are critical elements
 - For planning and analysis
 - In order to effectively advocate for the industry given the scarce resources facing our governments



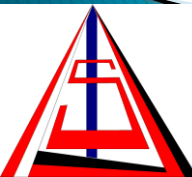
Tourism Satellite Account (TSA)

- ▶ Caribbean needs to move towards statistics that allow for more in depth analysis of the industry
- ▶ The Tourism Satellite Account (TSA) developed by the World Tourism Organization (UNWTO) is the internationally recognised framework for the measurement of tourism activity



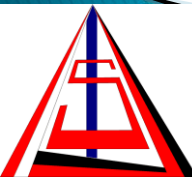
Tourism Satellite Account (TSA)

- ▶ Provides the framework within which to integrate, reconcile, organise and analyse the variety of economic statistics relevant to tourism
- ▶ This includes data from both the supply side – industry demand side –tourist



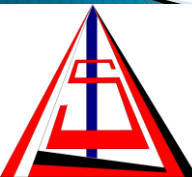
Tourism Satellite Account

- ▶ Measures direct economic contribution of tourism to the domestic economy
- ▶ Extension of the System of National Accounts (SNA). (satellite account)
- ▶ The concepts and definitions are consistent with the SNA framework
- ▶ Consistent with other industry measures in the SNA



Tourism Satellite Account (TSA)

- ▶ Tourism is not explicitly identified as an industry in the national accounts
- ▶ The industries in the national accounts are developed from the perspective of the producer
- ▶ An industry is a group of establishments performing a similar kind of activity



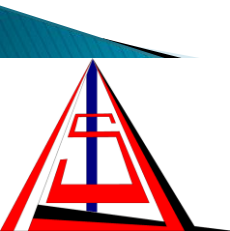
Tourism Satellite Account (TSA)

- ▶ Tourism is a demand phenomena, that is, it is primarily built from the perspective of the consumer.
- ▶ Connected to and forms part of various industries –Tourists purchase goods and services from different industries so TSA must identify and separate the tourism component of each industry



Development of TSA

- ▶ The development of the TSA requires resources, staff, financial, technical assistance, significant amount of data
- ▶ Most statistical agencies in the region are under funded and therefore cannot attempt this project without support
- ▶ Its development therefore **MUST** be a collaborative exercise led by the national tourism authority



Development of TSA

- ▶ Tourism Ministry/ National Tourism Organization
- ▶ National Statistical Office
- ▶ Central Bank
- ▶ Private Sector Partners
- ▶ Academic community



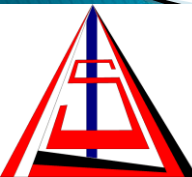
Development of TSA in Jamaica

- ▶ Inter agency committee was formed to guide the development of the TSA
- ▶ Led by STATIN
- ▶ Facilitated communication and data sharing between agencies and STATIN
- ▶ Tourism Enhancement Fund provided financial support for training and consultancy services



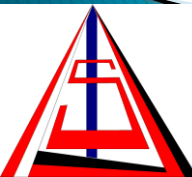
Development of TSA in Jamaica

- ▶ Ministry of Tourism
- ▶ Jamaica Tourist Board
- ▶ STATIN
- ▶ Planning Institute of Jamaica
- ▶ Tourism Product Development Company
- ▶ Jamaica Hotel & Tourist Association
- ▶ UWI



Development of TSA in Jamaica

- ▶ First TSA published in in 2009
- ▶ Second published in 2013
- ▶ Annually, STATIN produces estimates of tourism's contribution to GDP
- ▶ TSA provides information on both inbound and domestic tourism
- ▶ Prior to publication of TSA the contribution of Hotels and Restaurants was used as proxy



Development of TSA in Jamaica

Aggregates presented in the TSA

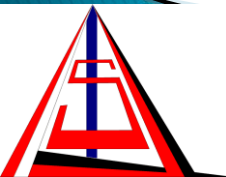
- ▶ Tourism direct gross value added
- ▶ Tourism direct gross domestic product
- ▶ Tourism expenditure
- ▶ Employment in Tourism Industries

[TSA_contribution.xls](#)



Tourism Direct Gross Domestic Product at Market Prices, 2007 – 2012

	2007	2008	2009	2010	2011	2012
Tourism Share of Total GDP						%
Tourism Direct Gross Domestic Product	7.4	7.1	7.2	6.9	6.5	6.4
Inbound Tourism	6.7	6.4	6.6	6.3	5.9	5.9
Domestic Tourism	0.8	0.7	0.6	0.5	0.5	0.5
Share of Tourism Direct GDP						%
Tourism Direct Gross Domestic Product	100	100	100	100	100	100
Inbound Tourism	89.6	90.1	91.7	92.2	91.6	92.9
Domestic Tourism	10.4	9.9	8.3	7.8	8.4	7.1



Internal Tourism Expenditure by Type of Tourism, 2007 – 2012

	2007	2008	2009	2010	2011	2012
					\$	Million
Internal Tourism Expenditure	171,458	184,461	202,898	202,428	201,837	207,828
Inbound Tourism	150,035	162,450	182,087	182,692	176,956	183,669
Domestic Tourism	21,423	22,011	20,811	19,736	24,881	24,159
						%
Internal Tourism Expenditure	100	100	100	100	100	100
Inbound Tourism	87.5	88.1	89.7	90.3	87.7	88.4
Domestic Tourism	12.5	11.9	10.3	9.7	12.3	11.6



Thank You!!

