Constructing Tourism Satellite Accounts
Diagnosis and Preparation of Recommendations

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Commissioned by the Caribbean Tourism Organization
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<td>BARNASS</td>
<td>Barbados National Accounts Survey</td>
</tr>
<tr>
<td>BCB</td>
<td>Bahamas Central Bank</td>
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<tr>
<td>BEC</td>
<td>Broad Economic Categories</td>
</tr>
<tr>
<td>BHTA</td>
<td>Barbados Hotel and Tourist Association</td>
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<tr>
<td>BNOC</td>
<td>Barbados National Oil Company</td>
</tr>
<tr>
<td>BOJ</td>
<td>Bank of Jamaica</td>
</tr>
<tr>
<td>BSS</td>
<td>Barbados Statistical Service</td>
</tr>
<tr>
<td>BTA</td>
<td>Barbados Tourism Authority</td>
</tr>
<tr>
<td>BVS</td>
<td>Barbados Visitor Survey</td>
</tr>
<tr>
<td>C.I.F</td>
<td>Cost Insurance and Freight</td>
</tr>
<tr>
<td>CBB</td>
<td>Central Bank of Barbados</td>
</tr>
<tr>
<td>CBTT</td>
<td>Central Bank of Trinidad and Tobago</td>
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<tr>
<td>CPI</td>
<td>Consumer Price index</td>
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<tr>
<td>CSOTT</td>
<td>Central Statistical Office of Trinidad and Tobago</td>
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<td>CTO</td>
<td>Caribbean Tourism Organization</td>
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<tr>
<td>EDs</td>
<td>Enumeration Districts</td>
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<td>GFCF</td>
<td>Gross Fixed Capital Formation</td>
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<td>HES</td>
<td>Household Expenditure Survey</td>
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<tr>
<td>HHFCE</td>
<td>Household final consumption expenditure</td>
</tr>
<tr>
<td>IADB</td>
<td>Inter-American Development Bank</td>
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<tr>
<td>IC</td>
<td>Intermediate Consumption</td>
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<td>ISIC</td>
<td>International Industrial Classification</td>
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<td>JTB</td>
<td>Jamaica Tourism Board</td>
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<td>JTSA</td>
<td>Jamaica Tourism Satellite Account</td>
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<td>JVES</td>
<td>Jamaica Visitor Expenditure Survey</td>
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<tr>
<td>LFS</td>
<td>Labor Force Survey</td>
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<tr>
<td>MOT</td>
<td>Ministry of Tourism</td>
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<td>NTA</td>
<td>National Tourism Agency</td>
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<tr>
<td>NIS</td>
<td>National Insurance Service</td>
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<tr>
<td>PSU</td>
<td>Primary Sampling Units</td>
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<td>RPI</td>
<td>Retail Price Index</td>
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<tr>
<td>RTSAII</td>
<td>Regional Tourism Satellite Account Implementation Initiative</td>
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<tr>
<td>SITC</td>
<td>Standard International Trade Classification</td>
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<td>SNA</td>
<td>System of National Accounts</td>
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<td>STATIN</td>
<td>Statistical Institute of Jamaica</td>
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<tr>
<td>SUT</td>
<td>Supply and Use Table</td>
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<tr>
<td>TDC</td>
<td>Tourism Development Cooperation</td>
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<tr>
<td>TDGDP</td>
<td>Tourism Direct Gross Domestic Product</td>
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<tr>
<td>TDGVA</td>
<td>Tourism Direct Gross Value Added</td>
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<tr>
<td>TGDP</td>
<td>Tourism Gross Domestic Product</td>
</tr>
<tr>
<td>Acronym</td>
<td>Full Form</td>
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<tr>
<td>TIDCO</td>
<td>Tourism Investment and Development Company</td>
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<td>TSA</td>
<td>Tourism Satellite Account</td>
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<tr>
<td>TSA: RMF</td>
<td>Tourism Satellite Account Recommended Methodological framework</td>
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<tr>
<td>TVA</td>
<td>Tourism Value Added</td>
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<tr>
<td>UNWTO</td>
<td>United Nations World Tourism Organization</td>
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<tr>
<td>VAT</td>
<td>Value Added Tax</td>
</tr>
<tr>
<td>VATI</td>
<td>Value Added of the tourism industries</td>
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<tr>
<td>WTTC</td>
<td>World Travel and Tourism Council</td>
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</table>
I. INTRODUCTION

1. The Caribbean Tourism Organization (CTO) signed an agreement with the Inter-American Development Bank (IADB) to execute the Regional Tourism Satellite Account (TSA) Implementation Initiative (RTSAII).

2. As indicated in the project document the overall purpose of the RTSAII is to strengthen the countries’ capabilities to assess the impact of tourism on their economies and as such improve policy preparation, formulation and implementation for sustainable economic growth. The methodology to be used is the UNWTO methodology as described in the Tourism Satellite Account Recommended Methodological framework 2008 (TSA: RMF 2008).

3. The tourism satellite account (TSA) provides the framework for measuring the direct contribution of tourism. It does not fully estimate the impact of tourism on the economy since it does not measure the indirect and induced effect of tourism. It could however form the basis for input output models and general equilibrium models which can be used to simulate the impacts (see Box 1)

**BOX 1: Paragraphs 1.15 and 1.16 TSA: RMF 2008**

<table>
<thead>
<tr>
<th>The complete Tourism Satellite Account provides:</th>
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<tbody>
<tr>
<td>Â Macro-economic aggregates that describe the size and the direct economic contribution of tourism, such as tourism direct gross value added (TDGVA) and tourism direct gross domestic product (TDGDP), consistent with similar aggregates for the total economy and for other productive economic activities and functional areas of interest;</td>
</tr>
<tr>
<td>Â Detailed data on tourism consumption, a more extended concept associated with the activity of visitors as consumers, and a description of how this demand is met by domestic supply and imports, integrated within tables derived from supply and use tables which can be compiled both at current and constant prices;</td>
</tr>
<tr>
<td>Â Detailed production accounts of the tourism industries, including data on employment, linkages with other productive economic activities and gross fixed capital formation;</td>
</tr>
<tr>
<td>Â Link between economic data and non-monetary information on tourism, such as number of trips (or visits), duration of stay, purpose of trip, modes of transport, etc., which is required to specify the characteristics of the economic variables.</td>
</tr>
</tbody>
</table>

Although some implicit assumptions are needed for the compilation of the recommended tables (see para. 4.57), the Tourism Satellite Account is mainly descriptive in nature and does not include any measurement of the indirect and induced effects of tourist consumption on the economic system as a whole. This means that the impact of tourism on the economy is not fully reflected in the Tourism Satellite Account tables and must therefore be measured and analyzed using other means. This can be done for instance using input-output or computable general equilibrium models based on the Tourism Satellite Account or other modeling instruments which allow for comprehensive tourism impact analysis (see annex 6).

**Source:** TSA: RMF 2008
4. The RTSAII will be carried out in four IADB and CTO member countries: The Bahamas, Barbados, Jamaica and Trinidad and Tobago. The Initiative carried out in these four countries will serve as a pilot project that aims to produce spin-offs that will eventually benefit the entire Caribbean region.

5. The RTSAII consists of three components, namely (i) the diagnosis and preparation of recommendations, (ii) the introduction of a common methodology and institutional framework for compiling TSAs, and (iii) capacity building towards standardized and harmonized statistics for the TSA.

6. This report relates to the first component and contains an overview of the main findings and recommendations related to the diagnosis of the TSA compilation in the four pilot countries.

7. The assessment focused directly on the data sources and methodology used for compiling the 10 TSA tables namely:

- Table 1: Inbound tourism expenditure by products and classes of visitors
- Table 2: Domestic tourism expenditure by products and classes of visitors and types of trips
- Table 3: Outbound tourism expenditure by products and classes of visitors
- Table 4: Internal tourism consumption by products
- Table 5: Production accounts of tourism industries and other industries
- Table 6: Total domestic supply and internal tourism
- Table 7: Employment in the tourism industries
- Table 8: Tourism gross fixed capital formation of tourism industries and other industries
- Table 9: Tourism collective consumption by products and levels of government
- Table 10: Non-monetary indicators

8. The report includes an assessment of the visitor surveys used for measuring inbound tourism flows and expenditures. The UNWTO questionnaire for measuring flows of inbound tourism is hereby used as guideline.

9. The report also includes an analysis of the relationships with other macro-economic frameworks focusing on the compilation of the supply and use tables (SUT) and the balance of payments (BOP), and the institutional framework for the TSA compilation. The report ends with a summary of the main findings and recommendations.

10. The diagnosis/assessment of the TSA compilation is based on desk research, and discussions with relevant stakeholders such as the staff of the statistical
offices, the tourists boards, the ministries of tourism and the central banks. Annex 2 contains an overview of the institutions and persons consulted. The Consultant would like to thank the stakeholders for their valuable contributions to the national assessments and the preparation of the recommendations.

11. The diagnosis and preparation of recommendations is also based on the discussions held during the Regional Coordinating and Technical Committee held from March 20\textsuperscript{th}-22\textsuperscript{nd}, 2013 in Barbados, and hosted by the CTO and the IDB. Annex 3 contains a copy of the list of participants.

12. Another main source of information are the results of the TSA readiness assessment survey. Annex 4 contains a copy of the questionnaire.
II. TSA IMPLEMENTATION STATUS IN THE PILOT COUNTRIES

A. Introduction

13. As recommended in the TSA:RMF 2008 the TSA should be developed in two
or more main stages depending on the availability of resources (see further
Box 2)

**Box 2: Stages of TSA implementation paragraph 4.5 to 4.7 TSA: RMF 2008**

The proposed tables, accounts and main aggregates should be developed in two or more main
stages depending on the development of source data in the country. In the first stage, the aim
is to compile tables 1 to 7 and table 10.

At a minimum, in order to speak of a satellite account, the Tourism Satellite Account must
include a detailed presentation of supply and consumption in terms of goods and services
acquired by visitors (tables 1-4) and of the industries that produce them (table 5) as well as
their components, as this constitutes the core of the Tourism Satellite Account system (table
6).

Because of the frequent strategic importance of tourism in the development of an employment
policy, table 7. Employment in the tourism industries, also forms part of the central core, as
well as table 10. Non-monetary indicators (as tourism economic variables are better
understood and analyzed by taking into account the flows of visitors and other descriptive
characteristics of tourism supply and demand).

In contrast, the compilation of table 8, Tourism gross fixed capital formation of tourism
industries and other industries, and table 9, Tourism collective consumption, by product and
level of government, requires not only the gathering of data from types of sources that usually
are not part of the current statistical programmers of national tourism administrations, but also
the overcoming of some specific conceptual challenges. As a consequence, the compilation of
tables 8 and 9 might be considered at a further stage in the compilation of a Tourism Satellite
Account.

The 10 tables are illustrative of the work to be undertaken, and should be considered as a
guide for presenting Tourism Satellite Account data. Each country should decide on the most
adequate format for taking into account its tourism reality and scope of available data.

**Source: TSA: RMF 2008**

14. The four pilot countries are in different stages of TSA implementation. In
summary Jamaica and the Bahamas have already met the minimum
requirements for compiling the TSA, while Trinidad and Tobago and
Barbados have limited compilations or are starting the compilation of the
TSA:

- Jamaica compiles all tables except for capital formation by industry (table 8)
- The Bahamas constructs all tables except for capital formation by industry
  (table 8) tourism collective consumption (table 9) and the non-monetary
  indicators (table 10).
• Trinidad has an experimental TSA with limited coverage related to inbound tourism expenditure (table 1), outbound (table 3), production account (table 5), employment (table 7), collective consumption (table 9), and some non-monetary indicators (table 10).
• Barbados has some non-monetary indicators e.g. number of arrivals and overnights and is just starting the compilation process.

B. Jamaica

15. Jamaica launched its first TSA in 2009. The TSA contains data for 2007 and will be updated to a more recent period (2010). As indicated by STATIN, the compilation of the TSA was part of a process to revise the national accounts system to be in line with the 1993 System of National Accounts (1993SNA) including the preparation of Supply and Use Tables (SUT). The system was revised with technical assistance from Statistics Sweden.

16. The compilation of the TSA was also supported by the Ministry of Tourism (MOT) requiring information related to the contribution of tourism to the Jamaica economy.

17. The Jamaica TSA (JTSA) can be regarded as a full-fledged TSA (see further Box 2) since it contains all tables except for table 8 related to Gross Fixed Capital Formation (GFCF).

18. In addition tables 7 and 9 require further improvements as indicated by STATIN e.g. by improving the sample frame of the labor force survey and by contacting the Ministry of Finance (MOF) to collect additional information concerning collective consumption expenditure.

C. The Bahamas

19. The Bahamas completed all TSA tables except for tables 8, 9 and 10. As such the Bahamas also has a full-fledged TSA because according to UNWTO, completion of TSA Tables 1–6 represent a full-fledged TSA showing the direct contribution of tourism. As described in Box 2, UNWTO recognizes the methodological challenges and constraints regarding compiling TSA Tables 8 and 9.

20. The TSA contains relatively outdated data for 2007 based on the 2007 Supply and Use Table (SUT), but the institutions involved are planning to update the TSA to a more recent period based on the 2012 SUT.

21. The financial resources for the compilation of the TSA were provided by the Ministry of Tourism (MOT). The MOT recruited a consultancy firm (Global Insight) to provide technical assistance in the compilation of the TSA. The
TSA system is placed under the Department of Statistics (DOS) National Accounts Division where the actual calculations are being done. DOS is responsible for the compilation of the national accounts.

D. Trinidad and Tobago

22. The Central Statistics Office of Trinidad and Tobago (CSOTT), has started experimenting with the compilation of the TSA around the year 2000. Experimental tables were compiled for the year 1999 using the available data with the aim to identify the data- and methodological gaps. An interagency committee was formed consisting of the CSO, the Tourism Development Cooperation (TDC), the MOT, the Central Bank of Trinidad and Tobago (CBTT), and the Immigration Department.

23. A further initiative was started in 2004, when Trinidad and Tobago contracted the World Travel and Tourism Council (WTTC) to estimate the economic impact of tourism for 2005 and to provide projections to 2020 in line with the country’s national development agenda “Vision 2020.

24. A highly experimental TSA was compiled, using an economic model to project the tourism sector’s economic performance, with contributions to the economy based on estimated relationships between various demand and supply variables. In cases where data were missing, estimates and assumptions were agreed upon by the local TSA team, which comprised the TSA expert from the CSO, the MOT, the CBTT and the National Tourism Agency (NTA), which, at the time, were the Tourism Investment and Development Company (TIDCO).

E. Barbados

25. The assessment in Barbados focused on the availability of data needed to compile a TSA. The preliminary finding is that the current data sources are adequate for constructing an experimental TSA. The main challenge will be related to the compilation of an updated Supply and Use Table.
III. DATA SOURCES

A. Introduction

26. This chapter contains an overview of the data sources used by Jamaica, The Bahamas, and Trinidad and Tobago. It also focusses on the data sources that could be used by Barbados to start the TSA implementation process.

B. Inbound Tourism Expenditure by Products and Classes of Visitors

27. Inbound Tourism Expenditure by Products and Classes of Visitors is included in Table 1 of the TSA tables.

28. *Jamaica* uses several data sources to estimate inbound tourism expenditure by products and classes of visitors. The main data sources are the Jamaica Visitor Expenditure Survey (JVES) with separate questionnaires for cruise tourists and overnight visitors, other travel statistics from the Jamaica Tourist Board (JTB), and the Balance of Payments (BOP) statistics published by the Bank of Jamaica (BOJ).

29. The JVES is conducted by the JTB. The frequency is monthly (one week a month) targeting a sample of departing visitors at both international airports as well as at the cruise ship piers. The questionnaire is very elaborate and is generally in line with the UNWTO recommendations. An assessment of the questionnaire is included in chapter IV.

30. *The Bahamas* uses the Ministry of Tourism Bahamas Visitor Expenditure Survey (BHSVES) as data source. The survey is conducted twice a week but the report is published on an annual basis. The survey targets a sample of departing visitors at the airports as well as at the cruise ship piers. The results of the survey are adjusted by the outcomes of the Bahamas SUT and BOP.

31. The *Trinidad and Tobago* data sources are arranged according to the products. Data regarding accommodation services were obtained from the national accounts, in particular the production account for hotels and guest houses, which is a supply side estimate. The preferred method would be to estimate the expenditures of tourists based on a visitor expenditure survey, and use the information to calculate the share of the demand in the supply. Data on air transportation were obtained from the balance of payments category passenger fares, credit. The other categories have the survey of departing visitors as a source, which can be regarded as an expenditure survey. The survey is conducted on a monthly basis.
In the case of Barbados, the Consultant recommends to examine the Barbados Stay-over Visitor Expenditure Survey and the Barbados Cruise Passenger Survey as the main data source for the compilation of inbound tourism flows and expenditure. These surveys are conducted by the Caribbean Tourism Organization (CTO) on behalf of the Barbados Tourism Authority (BTA). The survey is conducted on a monthly basis; however the processing of the information is done on a quarterly basis. The dissemination is done by the BTA.

C. Domestic tourism expenditure by products, classes of visitors and types of trips

Domestic tourism expenditure by products, classes of visitors and types of trips, is included in table 2 of the TSA tables.

As indicated in the TSA: RMF 2008, the concept of usual environment is central to determining the scope of domestic tourism. The usual environment distinguishes a visitor from all other travelers within a location. The usual environment of a person is defined as being the direct vicinity of his/her home and place of work or study and other places frequently visited (TSA:RMF 2008, par. 2.6).

The usual environment is difficult to define in precise terms. It corresponds generally to the geographical boundaries within which a person displaces herself or himself in the regular routine of her or his life. The boundaries of the usual environment can be established using dimensions like frequency of visits, distances traveled or formal boundaries of localities. (TSA: RMF 2008, par. 2.6).

The four pilot countries are very different in terms of geography, but all have indicated that they use or will use a combination of geographical boundaries and/or frequency of visits as determining variables.

Jamaica uses the administrative borders and the frequency of travel as criteria to determine the usual environment. The Parish of residence is used as the administrative border. The exception is the Greater Kingston Metropolitan Area (GKMA) which includes Kingston and St. Andrew, Portmore, Spanish Town and Bull Bay in St Thomas. In terms of the frequency of travel, persons who live on parish borders and cross these borders on a routine basis for work, school, health, church etc. are deemed to be in their usual environment.

The main data source for measuring domestic tourism expenditure in Jamaica is the Jamaica Tourism Expenditure Survey (JTES) conducted by STATIN supplemented by information from the SUT. The JTES includes questions related to same day trips, overnight trips and outbound trips. It also contains a
screening form to determine whether the respondent has undertaken a trip. The sample consists of about 3000 randomly selected individuals and collects data regarding the following variables:

- main purpose
- mode of travel
- type of accommodation
- length of stay
- number of household members
- expenditures on transportation, food and beverage, entertainment, shopping and other items to be specified
- consumption expenditure in kind
- other items to be specified

**BOX 3: Jamaica Tourism Expenditure Survey (JTES)**

As indicated in the STATIN TSA publication, the Jamaica Tourism Expenditure Survey (JTES) was conducted to determine the level of tourism expenditure of resident Jamaicans. The survey was conducted in two phases. Respondents were asked to report on number of trips and expenditure during the six months preceding the reference date.

The sample design for the JTES was a two stage stratified random sample design. The first stage involved a selection of Primary Sampling Units (PSUs) and the second stage a selection of dwellings within each of the selected PSUs.

The sample frame for the survey was the list of all the Enumeration Districts (EDs) in Jamaica from the 2001 census. An ED is an independent geographic area which shares common boundaries with contiguous EDs and developed for the purpose of data collection. Based on the geographic spread of dwellings in Jamaica, EDs were designed to have an average of 150 dwellings in urban areas and 100 dwellings in rural areas. When a group of EDs are selected for a survey, they are termed Primary Sampling Units. EDs are classified into urban and rural. This ensures that when required, reliable estimates can be obtained for both urban and rural areas.

The JTES was administered to 4,740 households in 474 PSUs that were distributed equally between urban and rural PSUs. The target population for the survey was household members and a responsible member of a household within each selected dwelling was asked to respond to the JTES questionnaire.

**Source:** Tourism Satellite Account 2007 Jamaica, Published by STATIN, Page 29

39. *The Bahamas* uses the Household Expenditure Survey as data source. This survey collects information related to expenditures of residents when going on vacation. Households are requested where they have been on vacation and the amount of spending. The disadvantage of this approach is that the household expenditure surveys are usually conducted once in 5 years or longer. The surveys can be costly due to the recommended duration of about one year to take account of seasonality in the spending patterns.
40. *Trinidad and Tobago* conducted a domestic tourism survey in 2008. The survey was conducted in 2008 by a private consultancy firm hired by TDC. The survey covered the period September to October, and includes questions related to same day trips, overnight trips and outbound trips. The survey will be updated in the course of 2013.

41. As indicated in the survey report a total of 1031 respondents were randomly selected. The person in the household, deciding on the vacations was selected as the respondent. The surveys were conducted at the persons home.

42. The results of the survey have not been used (yet) for the compilation of table 2. The Consultant recommends to investigate the use of the results of this survey for an initial estimate of domestic tourism expenditure.

43. The Consultant also recommends to enhance the definition of usual environment. The survey contains some questions from which the definition can be approximated. The questions are as follows:

- Q14. Thinking of the last 3 months, have you taken any overnight trips within Trinidad and Tobago? (E.g.: Spend a night or more in Mayaro, at a Friend/Family’s home etc.)
- Q19. Thinking of the last 3 months, have you taken any day trips within Trinidad and Tobago, outside of your usual environment? (E.g.: Spend a day at a Friend/Family’s home; Visit a site attraction; spent a day at the beach etc.)
- Q22. Details of Day Trips (Note: person can take a day trip Tobago)

44. In the case of *Barbados* the Consultant recommends as important next step to define the usual environment in Barbados. Based on discussions with the technical team, the preliminary conclusion was that the part of domestic tourism related to tourism expenditure of residents within Barbados, would be mainly related to “staycation” referring to the use of accommodation services by residents.

45. Given the aforementioned the following next steps are identified for Barbados:

- Contact the Barbados Hotel Association to investigate the type of information that could be supplied by them.
- Use the information available from the national accounts survey. This may be a challenging approach due to the non-response issues with this survey.
- Revive the accommodation survey; this survey was discontinued due to resource constraints.
- Conduct a domestic tourism household survey as was done in the case of Jamaica
D. **Outbound Tourism Expenditure by Products, Classes of Visitors**

46. Outbound Tourism Expenditure by Products, Classes of Visitors, is included in table 3 of the TSA tables.

47. The main data source for measuring outbound tourism expenditure in *Jamaica* is the same JTES section C related to outbound trips supplemented by information from the national accounts and balance of payments on e.g. airfare. The survey covers the following items:

- main purpose
- pre-trip expenditures related to e.g. transportation, airfare, food and beverage purchases at the airport
- package tours and their composition
- on-trip expenditures on airfare, accommodation, food and beverage, attractions, transportation, entertainment, shopping, and other to be specified

48. The survey also investigates whether part of the trip was paid by members outside the household. This facilitates the estimation of tourism consumption in kind.

49. *The Bahamas* uses the BOP combined with the SUT as a source.

50. *Trinidad and Tobago* makes a distinction of the sources by product as follows:

- Accommodation services: accommodation survey
- Food and beverage services: national accounts survey
- Passenger transport services: BOP item transport, debit
- Travel agency and tour operator services: data from the VAT administration
- Recreation and entertainment: national accounts survey
- Retail items (shopping): BOP item travel, debit
- Other: BOP item student and other government officials debit

51. As mentioned before, *Barbados* has not started the compilation of the tables yet. The Consultant recommends to investigate different options available for compiling estimates for outbound tourism expenditure by products and classes of visitors, which are summarized below.

- The internationally accepted best practice for collecting data related to outbound tourism expenditure is through a household expenditure survey (HES). The last HES in Barbados dates back from 2009/2010 and the information from this survey still awaits processing. The Consultant recommends to investigate whether the survey includes spending of residents abroad. The next HES is scheduled for 2015/2016. In preparation of this new survey special attention should be paid to including or improving a section on expenditures abroad.
• Another household survey is the labor force survey (LFS). This survey is conducted on a quarterly basis. An option is to combine this survey with an outbound tourism expenditure survey by attaching a related module to this survey. This option was regarded as a long term option since the BSS just finalized the design of a new LFS questionnaire.

• A third option is the use of the Balance of Payments (BOP) data. The BOP contains data related to travel of residents (travel, debit). The coverage of the BOP data needs to be improved since this only includes the exchange of foreign currency at the commercial banks.

• The use of number of departing residents multiplied by average spending abroad. The average spending abroad could be proxied by the average spending of residents of a similar country e.g. The Bahamas

• The use of mirror data; this option will only give totals but not the type of spending.

52. In terms of the way forward it was decided to use the BOP data as a starting point for the experimental TSA and to conduct an expenditure survey on the long term.

E. Internal Tourism Consumption by Product

53. Internal tourism consumption by product is the sum of domestic plus inbound tourism expenditures plus other components of tourism consumption. The domestic and inbound tourism expenditure is mainly related to the tourism consumption expenditure in cash while the other components of tourism consumption are mainly related to the tourism consumption in kind.

54. Statin makes estimates of (parts of) internal tourism consumption. The Jamaica Tourism Satellite Account (JTSA) focusses on internal tourism consumption in cash only.

55. The new HES of the Bahamas, which is in the processing stage, includes some estimates of the in kind transactions. This information will be used in the next compilation/update of the TSA. In the case of Barbados and Trinidad and Tobago the recommendation is to start estimating the expenditures in cash in the first phase of the TSA compilation. The other components of tourism consumption can be estimated in a next phase (see action plan for details).
F. Production Accounts of Tourism Industries and Other Industries and Total Domestic Supply and Internal Tourism

56. The Production Account of Tourism Industries and Other Industries (TSA table 5) and the Total Domestic Supply And Internal Tourism (TSA table 6) are related to the supply side of the TSA, while the previous tables discussed are related to the demand side.

57. The Production Accounts Of Tourism Industries (table 5) form input into the Total Domestic Supply And Internal Tourism (table 6) in which supply and demand are brought together using the SUT as the macro-economic framework.

58. Table 6 forms the core of the TSA and forms the basis for deriving the direct contribution of tourism to the economy by means of estimating the level and share of Value Added of the tourism industries (VATI), total Tourism Value Added (TVA), and Tourism Gross Domestic Product (TGDP).

59. The main data source for the Production Accounts of The Tourism Industries (table 5) in Jamaica, is the Annual National Income Survey for establishments, which focuses on collecting financial information from establishments with more than ten employees. In addition Jamaica has the advantage of having access to the data base of the VAT administration which is a rich data source containing information regarding the financial statements of establishments. STATIN also conducts surveys and studies related to establishments with less than ten employees.

60. The main data source for estimating table 6 is the SUT. A further description of the SUT is included under the chapter macro-economic frameworks.

61. The Bahamas also uses the national accounts (establishment) survey combined with the SUT as data sources for compiling the production accounts. Other data sources include data from the Department of Fisheries, the MOF, Treasury, financial statements of corporations etc.

62. Trinidad and Tobago constructed preliminary tables using different data sources such as the national accounts survey data, the BOP, and information from the survey of departing visitors. A major challenge was the estimation of intermediate consumption. This challenge was met by using intermediate consumption (IC)/output ratios from comparable industries.

63. In the case of Barbados, the economic surveys, administrative records, mainly from the tax authorities and an updated SUT were identified as the main data
sources for the supply side estimates. The SUT compilation is discussed under the chapter macro-economic frameworks.

64. The Barbados Statistical Service (BSS) conducts three major economic surveys, for the compilation of GDP at current prices, namely the Barbados National Accounts Survey (BARNASS), the Survey of Industrial Establishments and the Survey of Wholesale Prices (and Retail Trade). The Survey of Industrial Establishments was not conducted since 2007 due to lack of human and financial resources and low response rates.

65. The main survey, the BARNASS, covers all industries except Agriculture and Fishing. Financial Intermediation is also included with the exception of insurance companies. The information for the excluded industries is collected from the Ministry of Agriculture, the local fishermen, and the Central Bank respectively. The response rate for the BARNASS varies by industry. Based on the current business register as the population framework, the response rates vary from about 60 percent in 2009, and 42 percent in 2010, after two rounds of surveying, and 23 percent in 2011 after one survey round. This shows that the non-response issues are more related to the recent years and that there is a time-lag of about two years in the data. This will influence the compilation of the core tables of the TSA. A discussion needs to take place on what is required to improve the response as included in the plan of action.

66. Other data sources include:

- Ministry of Finance: the government budget for government related activities
- Ministry of agriculture: the quantity and price data for selected agricultural products
- Customs: the import and export of goods
- Financial statements of selected enterprises
- BNOCC (Barbados National Oil Company): for the production and export of crude oil and natural gas

G. Employment in the Tourism Industries

67. Employment in the tourism industries is included in table 7 of the TSA tables.

68. Jamaica, the Bahamas and Trinidad and Tobago use the Labor Force Survey (LFS) as main data source for estimating employment in the tourism industry. The main challenge with using the LFS as a data source is that the samples are usually too small to derive reliable estimates of employment in the tourism industries. Therefore this information should be supplemented by information from the supply side.
69. The LFS in Jamaica is a household survey conducted on a quarterly basis and targeting 8000 dwellings in 508 Enumeration Districts (EDs). The sample is a two stage stratified sample in the sense that first the EDs are selected and then the dwellings within the selected EDs. STATIN has indicated that further improvement is required in the survey sample size in order to be able to specify employment in the tourism industries.

70. The Bahamas uses a bi-annual LFS to estimate employment in tourism industries. The survey is conducted by the Bahamas Department of Statistics. As indicated in the LFS publication from the Bahamas:

In general the LFS sample is drawn from New Providence, Grand Bahama and two or three additional Family Islands. The Family Islands covered in each cycle of the LFS are rotated in and out of sample to ensure that over time the more populated islands are represented directly. The Department utilizes a multi-stage-stratified design in which each selected island forms a stratum. Each stratum contains a number of supervisory districts, which correspond to the political constituencies, as they existed in 2000. All supervisory districts are represented in the sample. The supervisory districts are further subdivided into enumeration districts. The number of enumeration districts depends on the number of households in the supervisory district as each enumeration area comprises about 150 households. In turn, enumeration districts (ED's) are selected at random based on the size of the supervisory district relative to the stratum. Finally, households within the selected ED's are selected randomly”. Source: The Bahamas Department of Statistics

71. Trinidad and Tobago also conducts a bi-annual LFS which is carried out in 12 periods within each six-month round (January-June and July-December). The survey is conducted by the Central Statistical Office of Trinidad and Tobago (CSO-TT). As indicated in the LFS publication from the CSO-TT:

The sample design is a two-stage stratified cluster sample consisting of EDs (primary units) at the first stage and non-compact clusters of households (ultimate sampling units) at the second stage. The first stage involved the selection of a "grand sample" of clusters of households within PSUs, which consisted of nine replicates chosen with an overall sampling fraction of 1/25. Systematic selection of PSUs was undertaken with probability proportionate to size. From this "grand sample" one-third of the nine replicates constitute the second stage sample, which is used to obtain survey data on the basis of a round of six-month duration. From each sample ED, a non-compact cluster of households is selected systematically with a random start, and an interval equal to the number of clusters allocated to the ED. These selected clusters make up the total of households to be interviewed for a particular period of enumeration within a round. The sample consists of approximately 3,200 households per round, which corresponds to about 1.5 percent of the total population. In order to maintain precise sampling probabilities, the measure of the size of the sampled EDs is updated prior to sample selection. Two thirds of the sample is repeated between successive rounds, with 1/3 being rotated out".
72. The main data sources in the case of Barbados could be a combination of sources consisting of the National Insurance Service (NIS), pay as you earn system, and the LFS. Further investigation of these sources is required to determine whether the LFS data contain sufficient information to be able to identify the tourism industries and/or if the survey can be adjusted to accommodate the requirements of the TSA. The LFS is conducted on a quarterly basis and covers the whole country using a two stage sampling procedure of households.

H. Tourism Gross Fixed Capital formation of Tourism Industries and Other Industries, and Tourism Collective Consumption by Products and Levels of Government

73. Tourism gross fixed capital formation (GFCF) of tourism industries and other industries (TSA table 8), and tourism collective consumption by products and levels of government (TSA table 9) are the tables that might be considered at a further stage in the compilation of the TSA.

74. As indicated in chapter II, none of the pilot countries compile table 8. The main reason for this are the practical and conceptual difficulties associated with the estimation of GFCF. Further investigation is required as to the data sources that could be used to estimate this. Widely used methodologies for estimating GFCF in the national accounts are the commodity flow method and the survey method.

75. The main data source for compiling table 9 could be the government budget data. Jamaica and Trinidad and Tobago have made an attempt to compile this table; however the tables contain the government expenditures related to e.g. expenditures of the Ministry of Tourism but not necessarily the collective non-market services that unambiguously benefit visitors and/or those services that benefit them directly.

I. The Non-monetary Indicators

76. The non-monetary indicators are:

- Number of trips and overnights by forms of tourism and classes of visitors
- Inbound tourism: number of arrivals and overnights by modes of transport
- Number of establishments and capacity by types of accommodation
- Number of establishments in tourism industries classified according to average number of jobs
77. The main data source for the non-monetary indicators would be the entry and departure cards from the Immigration Department, the business registrar and the Tourist Boards or Authorities, or MOTs in the different countries.

78. In the case of the Bahamas for example, the MOT collects and compiles a wide range of tourism statistics as summarized in table 1 below:

Table 1: The Bahamas, selected MOT data collection activities

<table>
<thead>
<tr>
<th>TOURISM STATISTICS</th>
<th>FREQUENCY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hotel Occupancy Data</td>
<td>Monthly</td>
</tr>
<tr>
<td>Visitor Expenditure Survey (Stopover Visitors)</td>
<td>Data is collected twice a week but the report is done Annually</td>
</tr>
<tr>
<td>Tour Operator and Media Exit Survey</td>
<td>Data is collected Weekly but the report is done Annually</td>
</tr>
<tr>
<td>Cruise Visitor Expenditure Surveys</td>
<td>Data is collected Weekly but the report is done Annually</td>
</tr>
<tr>
<td>Cruise Satisfaction Surveys</td>
<td>Data is collected Weekly but the report is done Annually</td>
</tr>
<tr>
<td>Cruise Statistics</td>
<td>Monthly</td>
</tr>
<tr>
<td>Visitor Arrival Statistics (air and sea, stopovers, origin, etc.)</td>
<td>Monthly</td>
</tr>
<tr>
<td>Casino Revenue Data</td>
<td>Monthly</td>
</tr>
</tbody>
</table>

79. Other useful sources of information for tourism statistics are the hotel revenue taxation data base and the manifest of cruise liners.

Two of the problems reported during the compilation of tourism statistics are the non-response rates and the fact that the data is not always provided in a timely manner.

80. It is important to note that the immigration cards (entry cards) in Barbados are being reviewed following an initiative of the MOT. The technical team recommends adjusting the cards to be able to improve the estimation of the length of stay. At this moment only the intended length of stay from the entry cards can be used, given the inconsistencies between intended and actual lengths of stay from arrival and departure cards. In addition, the questioning used makes it unclear whether the length of stay refers to the number of days or nights. This distinction is however important to be able to identify one-day visitors.
IV. ASSESSMENT OF EXPENDITURE SURVEYS

81. This chapter contains the main findings related to the assessment of the different questionnaires that are used or are identified as usable for estimating inbound tourism flows. The UNWTO questionnaire for measuring inbound tourism flows is used as guideline for the assessment. A copy of the questionnaire is included in Annex 2.

A. Determining the Residency of the Respondent

82. The residency of the respondent is an important variable in determining the scope and boundaries of inbound tourism.

83. The UNWTO questionnaire for measuring inbound tourism flows starts with determining the residency of the respondent. There are three options possible namely (the respondent is) resident in the country of reference, in another country, or the person is leaving the reference country to establish his/her residency elsewhere. The survey ends at this point if the respondent is resident in the country of reference. If the respondent is leaving to establish residency elsewhere, the survey continues asking specific questions related to in-between stops before reaching the final destination.

84. The main finding related to the pilot countries is that the questionnaires generally follow the international guidelines by starting with determining the residency of the respondent. However none of the pilot countries include all the three options, which could be useful for further analysis. In the case of Jamaica, the questionnaire does not contain an explicit question related to the residency of the respondent, but the interviewer does a verbal investigation of the residency.

85. Jamaica and Barbados include a category related to nationals residing abroad i.e. Jamaicans and Barbadians residing abroad. As indicated in the manual the category of nationals residing abroad is of analytical importance given the possible difference in spending patterns and the frequency of visits.

86. Trinidad and Tobago include questions related to the country of birth which could also be useful for analytical purposes.

87. In terms of residency, it is recommended to list those countries that are of major importance to the tourism sector. The Bahamas makes a distinction between United States, Canada and other countries to be specified These first groups are of particular relevance for the tourism sector of the Bahamas.
B. Mode of Transport

88. The UNWTO questionnaire includes questions related to the mode of transport the respondent used when departing and arriving.

89. None of the pilot countries include questions related to the mode of transport given the fact that the only means of transport is by air in the case of inbound and outbound tourism and by sea in the case of cruise tourists. A special case for consideration is the overnight stay of cruise tourists in the country of reference awaiting their connecting flights.

C. Identification of Visitors

90. The UNWTO questionnaire includes a specific block for excluding travelers that are not visitors, as included below in Box 3. This is very useful to make sure that the statistics are within the tourism boundaries.

Box 3: Excluding travelers being not visitors

91. The main finding is that none of the pilot countries accommodate the distinction between travelers and visitors. In addition, one-day visitors other than cruise tourists are excluded.

D. Length of Stay

92. The UNWTO questionnaire contains two blocks of questions to derive the length of stay, namely the number of nights spent in the country of reference, and the departure and arrival date. The respondent can choose among several options with regard to the number of nights spent in the reference country:

- None, due to in-transit travel
- None due to one day visit
- One or more nights as indicated
93. The overnight and one day visitors are asked for the reasons of their visit, while the one day visitors are also asked about the frequency of their trips.

94. The pilot countries have different approaches in this regard. None of the countries ask two questions to determine the length of stay or make a distinction in the three options of in transit, one day and overnight stay. Jamaica asks for the arrival and departure date to derive the length of stay indirectly. Barbados and the Bahamas ask for the number of nights spent in the reference country. Trinidad and Tobago does not ask any questions related to the length of stay.

E. Purpose of Visit

95. The main purpose of a trip is defined as the purpose in the absence of which the trip would not have taken place (see IRTS 2008, par. 3.10). The main purpose of the trip is divided into personal reasons and business and professional reasons. The personal reasons are as indicated in Box 4, with more than one option possible.

Box 4: Purpose of visit

96. All the surveys of the pilot countries investigate the purpose of visit with varying details of reasons and tailored to the local situation. Jamaica distinguishes the following purpose of visit categories:

- Vacation
- Business/vacation
- Honeymoon
- Convention
- Business
- Other (specify)

97. However, it would also be useful to identify categories related to education and health separately, given the specific treatment of these categories (see Annex 1 article 7). In addition, Jamaica is a major destination for educational services in the region through the University of the West Indies.

98. Students taking short term courses (less than one year) are visitors whereas those taking long-term courses (one year or more) should be considered within their usual environment in their place of study and be excluded from visitors although, in both cases, they are considered as non-residents.

99. The Bahamas uses the following categories as included in the snapshot of the questionnaire:

```
Q2. What was the PRIMARY purpose of your visit?
- Vacation
- Business-Conference
- Business-Other
- Get Married (& Honeymoon)
- Honeymoon
- Attend Wedding
- Casino
- Other
```

100. The purpose of visit is also included in the Visitor Satisfaction Exit Survey as included in the snapshot below.

```
1. WHAT IS THE MAIN REASON FOR THIS VISIT TO THE BAHAMAS? PLEASE CHECK [✓] ONE ONLY

1. [ ] To get Married
2. [ ] Honeymoon
3. [ ] To attend a wedding
4. [ ] Vacation
5. [ ] Vacation won/awarded through business
6. [ ] Visiting Friends/Relatives
7. [ ] Conference/Convention
8. [ ] Other business trip
9. [ ] Accompanying someone on business
10. [ ] Business trip extended to a vacation
11. [ ] Accompanying someone on business trip extended to vacation
12. [ ] Business related vacation (perk, teambuilding, etc.)
98. [ ] Other reason (please write in) __________________________________________
```
101. *Trinidad and Tobago* distinguishes the following categories:

- Vacation,
- Friends/relatives
- Business meeting/conference
- Study
- Medical
- Carnival
- Personal/business
- Other (specify)
- Not stated.

102. The Consultant recommends to leave out the option of “not stated” since this gives the respondent a way out.

103. *Barbados* has an elaborate list of categories consisting of:

- Vacation
- Business/vacation
- Honeymoon
- Conference/meeting/incentive
- Festival
- Medical/health/wellness/recuperation
- Business only
- Visit friends/relatives
- Wedding
- Golf
- Sports/games meet (specify)
- Other (specify)

F. Expenditure by Product

104. Expenditure by product is one of the main components of the TSA. The UNWTO questionnaire contains on the one hand an elaborate checklist of activities taken part in without a monetary dimension, and on the other hand a set of questions related to the acquisition of goods and services, but limited to global categories: transport services, airfare, accommodation, other services and other goods.

105. All pilot countries have a more extended framework for estimating tourism expenditure by product. The details of the categories differ per country given the varying circumstances. Examples of matching categories are accommodation, food and beverage outside accommodation, entertainment
categories e.g. visitor attractions, transportation (taxi, car rental, ferry etc.), shopping (clothing, books, spirits etc.), miscellaneous expenses). In order to accommodate the product detail in the TSA broad categories such as shopping without specifying items should be avoided.

G. Distinction between Tourism Trips, Visits and Number of Visitors

106. The UNWTO questionnaire allows for making the distinction between tourism trips, visits and number of visitors. A trip refers to the travel by a person from the time of departure from his usual residence until he/she returns: it thus refers to a round trip. A trip is made up of visits to different places (see par. 2.33 ITRS 2008). As indicated in the IRTS par. 2.33, 2.34, the term tourism visit refers to a stay in a place visited during a tourism trip. The stay does not need to be overnight to qualify as a tourism visit. Nevertheless, the notion of stay supposes that there is a stop. Entering a geographical area without stopping there does not qualify as a visit to that area.

107. It is recommended that countries define the minimum duration of stops to be considered as tourism visits. Observing tourism trips and visits is not the same as observing visitors, as an individual can make more than one trip or visit during the period of observation. In the surveys for these three forms of tourism (see para.2.39 and 2.40), the term Visitor is often used instead of tourism visit or tourism trip.

108. All pilot countries focus on the number of visitors. It is recommended that the concepts of visits, trips and number of visitors be clearly defined

H. Type of accommodation

109. All the surveys include detailed questions about the type of accommodation, including the name of the accommodation. The UNWTO questionnaire additionally cross classifies different accommodation types by places visited and number of nights. This appears to be relevant for the region as visitors may visit multiple places during their trip.

I. Pre- and Post-trip Acquisition of Goods and Services

110. The UNWTO includes questions related to the pre- and post-trip acquisition of goods and services in the country of residence (transportation, accommodation, package tours, other) to be included in the domestic part of outbound tourism.
111. *Jamaica* and *Trinidad and Tobago* include the pre-trip acquisition of goods and services in the domestic tourism expenditure survey. No estimates are made for post-trip acquisition of services. *The Bahamas* and *Barbados* include neither.

**J. Questions Related to Packages**

112. All questionnaires contain information related to packages, so as to be able to specify items included in the package such as accommodation, in-city transport services, food and beverage services, airfare etc. In all cases except for the Bahamas, only the total amount of the package is requested. The breakdown of the items in the package is based on the name of the package. In the case of Barbados, tour operators’ information plus background data from the hotels and other relevant ground operators are used to fine tune a breakdown of the cost of the package.

113. In the case of the Bahamas separate questions are included in the expenditure survey related to accommodate the breakdown of the package.
V. METHODOLOGY

A. Introduction

114. All the pilot countries agreed to use the international standard as presented in The Tourism Satellite Account: Recommended Methodological Framework (TSA: RMF 2008), and the ITRS2008 as a guideline. However several differences/methodological gaps can be found.

115. The diagnosis focuses on the classifications, the system of national accounts used, the scope of consumption expenditures, the definition of visitors, the net valuation of reservation services, and tourism visits and trips.

B. Classifications

116. The TSA: RMF 2008 recommends the use of the Central Product Classification (CPC) to classify the tourism products, and the International Industrial Classification revision 4 (ISIC rev. 4) to classify the industries.

117. The classifications in the different countries were adjusted to fit the local circumstances. Trinidad and Tobago uses a limited set of products and does not make a distinction between classes of visitors. Jamaica and The Bahamas use the UNWTO classification of products adjusted to the local situation. For example, water transport is not relevant for Jamaica and Barbados but it is for The Bahamas and Trinidad and Tobago.

118. The TSA: RMF 2008 uses the term “visitors” which is divided into “tourists” and “excursionists.” A “tourist” is defined as a person travelling outside his/her usual environment, who spends one or more nights in the place visited. Excursionists are described as same-day visitors who do not spend any nights at the place visited. The TSA’s in the pilot countries, in contrast, include only cruise tourists as excursionists.

119. The Bahamas has a specific situation in the sense that it consists of a chain of islands whereby cruise ships could visit different islands during one visit.

120. During the discussion with stakeholders it was indicated that with regard to inbound tourism the only relevant same-day visitors would be cruise tourists. Further investigation is recommended to validate this assumption, since it is possible to travel from one country to another in one day e.g. from The Bahamas to the USA. It was also noted that for some of the pilot countries the concept of same-day visitors is more relevant in the case of domestic tourism.
121. The classification used in Jamaica for classifying industries is the Jamaica Classification of Industries whiles the TSA: RMF 2008 recommends the use of ISIC rev. 4. The main differences between the two classifications is related to a further (5 digit) specification of typical Jamaican products such as Ackee, ginger etc. In addition there is a cross tabulation which can be used to match the Jamaican classification with the international. This cross tabulation will be updated to match ISIC rev. 4. as it correspond to ISIC rev.3 at this moment. The Bahamas and Barbados also use ISIC rev. 4, while Trinidad and Tobago uses ISIC rev. 3.

C. The System of National Accounts

122. The TSA: RMF 2008 recommends the use of the 2008 System of National Accounts (2008 SNA) as the conceptual macro-economic framework for the TSA. None of the pilot countries use this system, and the TSAs are based on the 1993 SNA.

123. Jamaica will embark on the implementation of the 2008 SNA in the course of this year (2013) and will serve as a pilot for the implementation of the 2008 SNA in the Caribbean Region. The other countries plan to start the implementation in 2014 or later. In addition the national accounts systems of some of the countries (esp. Trinidad and Tobago) have serious deficiencies which need to be addressed urgently.
D. Definition of Visitors

124. The following table gives an indication of the definition of visitors in all four pilot countries. The definition is generally in line with international recommendations. The issue of transit passengers should be investigated further (see Annex 1).

<table>
<thead>
<tr>
<th>DEFINITION OF VISITORS</th>
<th>Included / yes</th>
<th>Included/no</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foreign student for an academic year</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Accompanying family of such a student</td>
<td>Yes as long as they are not staying beyond the allotted days</td>
<td>No if they stay for more than a year</td>
</tr>
<tr>
<td>Foreign student for more than an academic year</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Accompanying family of such a student</td>
<td>Yes as long as they are not staying beyond the allotted days</td>
<td>No if they stay for more than a year</td>
</tr>
<tr>
<td>Accountant (short term consultant)</td>
<td>No if they have been given a work permit</td>
<td></td>
</tr>
<tr>
<td>Information technology consultant</td>
<td>No if they have been given a work permit</td>
<td></td>
</tr>
<tr>
<td>Person visiting for medical treatment</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Person in transit</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>A person coming for a short term, working with an international organization</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Crew on an air carrier</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>The person coming to stay in his/her second home</td>
<td>Yes</td>
<td></td>
</tr>
</tbody>
</table>

E. Scope of Tourism Consumption

125. The TSA: RMF 2008 recommends the use of the concept of tourism consumption which is equal to tourism expenditures plus other consumption items mainly related to consumption in kind. At present, the TSA’s do not include all the other consumption items. Jamaica includes part of consumption in kind in the estimation of domestic tourism. Further improvement is recommended.

F. Net Valuation of Reservation Services

126. The net valuation of reservation services means that commissions earned by travel agents and other reservation services should be separated out from the vacation costs and recorded as being directly sold to visitors. In order to do this, tour packages have to be broken down into their components (e.g., air transportation, accommodation) and recorded as if they too are bought directly by visitors, net of commissions. In addition, the commissions need to be removed from sales of non-packaged commodities and treated as being sold, instead, to travelers. In the Jamaica system, the services of travel agencies and tour operators are measured as commissions earned. Tour packages are broken
down by component, and the revenues from the individual commodities are recorded. Further improvements in this regard are required.

G. Tourism Visits, Trips and Number of Tourists

127. The pilot countries do not make the distinction between tourism visits, trips and number of visitors. As indicated in the IRTS paragraph 2.33, 2.34, the term tourism visit refers to a stay in a place visited during a tourism trip. The stay does not need to be overnight to qualify as a tourism visit. Nevertheless, the notion of staying supposes that there is a stop. Entering a geographical area without stopping there does not qualify as a visit to that area. It is recommended that countries define the minimum duration of stops to be considered as tourism visits.

128. Observing tourism trips and visits is not the same as observing visitors, as an individual might make more than one trip or visit during the period of observation. In the statistical surveys for the three forms of tourism (see paragraphs 2.39 and 2.40), the term Visitor is often used instead of tourism visit or tourism trip. It is recommended that these concepts be clearly defined and differentiated in the statistical operations and presentation of the information.
VI. MACRO-ECONOMIC FRAMEWORKS

129. The Consultant assessed the current status of the national accounts compilation with focus on the data sources and methodology of the SUT. The Consultant also made a diagnosis of the current status of the BOP.

A. Jamaica

130. STATIN has compiled SUTs for the year 2000 and 2007 and is in the process of starting the compilation of an SUT for 2011. The SUT consists of 301 commodity groups and 76 industries but is published on a less detailed level consisting of 57 commodity groups and 53 industries. The tourism share in the output of the different industries was measured from the demand side while the intermediate consumption was estimated using the overall input-output ratio from the industry as a whole.

131. The main data sources for the SUT are the following:

- Detailed financial statements from establishments
- International trade statistics from Customs
- Production accounts from the national accounts estimates
- Balance of payments data from the BOJ
- Household expenditure survey data
- Government account information
- Special surveys from commodity boards

132. The SUT is generally in line with the recommendations of the 1993 SNA and will be updated to the 2008 SNA. The SUT forms an integral part of the national accounts system in Jamaica and is used to check the consistency of the estimates from the different approaches and also serves as benchmark for the national accounts.

133. The updating process for SUT 2011 using the concepts and definitions of the 2008 SNA, will involve the collection of detailed information by means of elaborate surveys such as the Household Expenditure Survey (HES).

134. The HES provides valuable information for the compilation of estimates related to household final consumption expenditure. The latest HES were conducted in 2004/2005 and STATIN is preparing for the HES 2015. However the implementation of the update depends on the availability of funds for the HES.

135. In addition, information is required related to the detailed cost structures of establishments, detailed imports and exports of goods and services by product,
government final consumption expenditure by product, capital formation by product, changes in inventories by product and taxes less subsidies on production and imports.

136. The BOP data used for compiling JTSA is related to the airfare paid by residents to foreign airlines and airfare received from abroad by the national airline which no longer exists at this moment.

137. The main data source for the BOP consists of industry specific survey forms which are sent to the different establishments. The response rate is generally sufficient to compile methodological sound estimates except for the response rate of the hotels. Other data sources esp. related to travel are derived from the expenditure surveys conducted by the JTB and STATIN.

138. In terms of methodology the BOJ has implemented the recommendations of the latest version of the 6th edition of the Balance of Payments Manual (BPM6). However, some areas for improvement were identified, especially related to the coverage of travel. These expenditures are exactly equal to the expenditures as derived from the tourism expenditure survey, while the estimates for travel should be higher than the estimates related to visitors since visitors are a subset of travelers.

139. As indicated in the TSA:RMF 2008 and the 2008 International Recommendations on Tourism Statistics (2008IRTS) there is some difference in coverage since the BOP focusses on the estimation of travel whereas tourism statistics and the TSA focus on the estimation of tourism. The 2008IRTS contains a bridge table showing the relationship between the travel and passenger international transport services in the BOP and inbound and outbound tourism expenditure (see figure 8.1 pages 72, 2008 International Recommendations on Tourism Statistics). In addition the TSA: RMF explains the coverage of travelers and visitors, as visitors being a subset of travelers.

B. The Bahamas

140. The Bahamas Department of Statistics (BDOS) has compiled balanced SUTs for 2005 and 2007 using international best practices according to the 1993 SNA. The Bahamas Central Bank (BCB) is the agency in charge of the compilation of the BOP. The BOP is compiled according the 5th version of the Balance of Payments Manual (BPM5).

141. The travel inflow item in the Balance of Payments is derived directly from the MOT expenditure survey data, while the travel outflow information is calculated via approvals granted for travel purposes via the exchange control regime. This requires further improvement as the BOP focusses on travelers
and not only on visitors. Other data sources for the BOP compilation are elaborate establishment surveys.

C. Trinidad and Tobago

142. The CSO has compiled a SUT for the year 2000 consisting of about 100 products and 54 industries. The SUT needs to be updated using improved methodologies and investigating data sources.

143. As is the case in the other pilot countries, the travel inflow item in the Balance of Payments is derived directly from the expenditure survey data. This requires further improvement as the BOP focuses on travelers and not only on visitors. Further investigation is required related to the estimation of transportation services.

D. Barbados

144. The latest SUT dates back to the year 2000. The Consultant recommends starting the updating process by using the available data sources as much as possible and using the framework of the SUT from the year 2000. A major challenge will be the estimation of intermediate consumption by product.

145. The following data are required:

- Output by industry and product
- Intermediate consumption by industry and product
- Import and export of goods and services by product
- Household final consumption expenditure by product
- Government final consumption expenditure by product
- Gross fixed capital formation by product
- Changes in inventories by product
- Taxes less subsidies on products
- Compensation of employees and taxes less subsidies on production

146. Output at current prices can be derived from BARNASS combined with data from the VAT administration providing that there is sufficient response in quantity and quality. Output by product is not readily available but can be derived from the output structure of the different enterprises.

147. Intermediate consumption by industry in current prices can be derived from BARNASS providing that there is sufficient response in quantity and quality. The recommendation is to conduct an intermediate costs structure survey to derive the intermediate use by product. Another option is to investigate
financial statements from enterprises and to use their cost structure to apply for the industries. A third option is to ask for detailed costs in the BARNASS.

148. The Customs\' trade statistics on imports and exports provide a valuable, timely and low cost data-source for imported and exported goods. Detailed information can be obtained by groups of products and by individual importer and exporter. The data can also be classified by ISIC, SITC and the Broad Economic Classification (BEC). In addition, the value of the duties and other taxes on the imported products that are collected by the Customs Authority could be easily added to the corresponding imported cost insurance and freight (c.i.f), value, as part of the transformation of basic prices into purchaser prices.

149. The main data source for the imports and exports of services is the balance of payments as compiled by the Central Bank of Barbados. The data regarding international trade in services is less detailed compared to the information regarding goods.

150. The main data source for household final consumption expenditure (HHFCE) could be the HES. As mentioned before the last survey was conducted in 2009/2010 and the data still needs to be processed. In the current estimates of GDP by expenditure HHFCE is calculated using the commodity flow approach. The recommendation is to look for support, technical or otherwise, to process the data.

151. Further improvements are required, such as:

- Inclusion of the estimates of final consumption expenditure of Non Profit Institutions serving Households;
- Estimates for household final consumption should be compiled based on the change in the number of households and RPI rather than population and CPI;
- Using the results of the Household Budget Survey 2009/201 to improve the estimates on HHFCE

152. Government final consumption expenditure (GFCE) is calculated as the sum of the compensation of employees and the intermediate consumption. The other components, namely, other taxes on production, sales of goods and services, depreciation and own account capital formation are negligible in the case of Barbados. However this should be monitored. The product breakdown of intermediate consumption can be derived from the budget information as provided by the Ministry of Finance.
153. Gross fixed capital formation (GFCF) could be estimated by using the commodity flow approach as is done currently, based on imported capital goods plus the local component of construction.

154. The information regarding taxes and subsidies on products and production are available from the government accounts. Compensation of employees is available from the establishment survey, the government accounts and the balance of payments.

155. As indicated by the Central Bank of Barbados (CBB), the main data source for the BOP consist of industry specific surveys combined with data from the exchange control department, daily foreign exchange transactions at the commercial banks, and data from the expenditure survey.

156. Travel covers expenditures of all visitors to Barbados and the expenditures of residents travelling abroad, except persons included in government n.i.e. It includes local transportation but excludes international transport. The CBB surveys hotels, restaurants, guest houses, health clinics, and educational institutions to gather the required information. The main data sources for transportation services are the airlines, cruise ships, travel agencies, destination management companies, and shipping companies, combined with data from the expenditure survey.

157. As in Jamaica, the response rate is generally sufficient to compile methodological sound estimates, with the exception of the response rate from the hotels.

158. In terms of methodology the CBB has implemented the recommendations of the latest version of the 6th edition of the Balance of Payments Manual (BPM6). However some areas for improvement remain, especially related to the coverage of travel. Expenditures are higher than the expenditures as derived from the tourism expenditure survey, as it should be. However there is some missing data especially in business travel related to civil servants, and possible double counting due to the surveying of students and health clinics. It is recommended to investigate this further and to correct any possible errors.


VII. INSTITUTIONAL ARRANGEMENTS AND CHALLENGES

159. This chapter summarizes the main finding and recommendations related to the institutional arrangements put in place by the pilot countries to facilitate the implementation of the TSA compilation.

Political support and commitment

160. It is important for the countries to have the political support and commitment to support and sustain the TSA compilation. One of the lessons learned for the case of Jamaica for instance is that the compilation of the TSA was also supported by the MOT requiring information related to the contribution of tourism to the Jamaica economy.

TSA awareness

161. It is important to improve the TSA awareness. The countries indicated that the level of TSA awareness is regarded as good but could be improved by organizing Public Forums and organizing meetings with stakeholders and data providers. CTO is also committed to widening awareness throughout the Caribbean through workshops, webinars and other forms of communication.

Installation of an interagency committee

162. One the findings is that it is important to install an inter-agency committee. This was done in all the pilot countries. In the case of Jamaica an interagency committee was established consisting of STATIN, JTB, BOJ, MOT and the Planning Institute of Jamaica, the Tourism Product Development Company, The Jamaica Hotel and Tourist Association, and the Institute of Hospitality and Tourism of the University of the West Indies. The committee is administrative and technical in nature. The core of the technical committee consists of STATIN, JTB, BOJ.

163. STATIN, JTB and BOJ, which form the core of the technical committee of the TSA worked closely together in compiling the TSA. Other institutions involved are the Ministry of Tourism and the Immigration Department.

164. The mechanism used to establish the interagency commission in the Bahamas was to establish an approval committee and a working committee. The approval committee consists of the Governor of the Central Bank, Director of Statistics, Director of Economic Planning, Ministry of Finance, Director General of Tourism, Senior Director of Research and Statistics, Permanent Secretary of Tourism and the Minister of Tourism. The Working Committee consists of the Statistical Assistant, Research Department Central Bank; National Accounts Staff and Supervisor, DOS and the General Manager of the Ministry of Tourism. This structure has the advantage of budget and general resource approval, thereby facilitating the TSA operation.
165. *Trinidad and Tobago* has an interagency committee which was established in 2008. The committee comprised the CSO, the Tourism Development Cooperation (TDC), the MOT, the Central Bank of Trinidad and Tobago (CBTT) and the Immigration Department. The inter-agency committee is not active at the moment.

166. *Barbados* has a TSA technical committee. The core of the committee in Barbados consists of the Barbados Statistical Services (BSS), the Barbados Tourism Authority (BTA), the MOT, the Barbados Central Bank and the CTO.

**Clear assignment of institutional tasks**

167. It is also important to have a clear assignment of the different tasks in the whole process from data collection to processing and dissemination. Each committee should also have clear terms of reference and guidelines for its operation.

168. The statistical office is the agency responsible for compiling the TSA and the national accounts including the SUT, while the central banks have the responsibility for compiling the balance of payments.

169. *The Bahamas* has a three party consensus arrangement consisting of the Central Bank, the Department of Statistics and the MOT. The MOT recruited a private consultancy firm to provide technical assistance in the compilation of the TSA.

170. The responsibilities in terms of the other data collection activities vary by country. Some examples are included below:

- In the case of *Jamaica*, STATIN has the responsibility for conducting the domestic tourism expenditure survey. JTB is in charge of the tourism expenditure survey related to inbound tourism flows.
- The MOT in *the Bahamas* is responsible for the collection of a wide range of tourism statistics as indicated under the chapter related to data sources, one of which is the expenditure survey.
- In *Trinidad and Tobago*, the CSOTT conducts the expenditure survey on behalf of the Central Bank. The CBTT provides the necessary human and financial resources. The TDC conducted a domestic expenditure survey.
- The visitor survey in *Barbados* is conducted by the CTO on behalf of the MOT.

**Compilation of an experimental TSA**

171. It is recommended to compile an experimental or pilot TSA using the available data to identify data- and methodology gaps. This was the approach used in all pilot countries that have compiled TSA (The Bahamas, Trinidad and Tobago and Jamaica).
172. The recommendation is for Barbados to also follow this approach and start with the compilation in a close collaboration with the BSS, the CBB, the BTA, the MOT and the Immigration Department. These departments form the core of the inter-agency technical committee of the TSA, which is advised to be chaired by the BSS. BSS will have the responsibility for compiling the TSA and conducting the domestic tourism expenditure survey. CTO and MOT will be in charge of the tourism expenditure survey related to inbound tourism flows as is already the case. The CBB is the agency responsible for the BOP compilation.

Sufficient human and financial resources
173. The pilot countries experience resource challenges in their effort to develop and sustain the compilation of TSA. The detailed basic data requirements and the complexity of the system necessitate the establishment of a separate unit within the national accounts department consisting of at least two to three persons and additional staff to conduct the related surveys.

174. Jamaica: the department responsible for the compilation of the national accounts within STATIN is the Economic Accounting Division. The number of statisticians employed within this Division is 14. In terms of resources, STATIN has indicated that it would be useful to have two dedicated staff members for the compilation of the TSA. At this moment the 14 statisticians employed are also responsible for the compilation of other economic statistics within the Department.

175. Barbados: the BSS division with overall responsibility for compilation of National Accounts Statistics is the Trade and National Accounts (TND) division which has an establishment of eight statisticians with a present complement of five, of which two are on study leave until September 2013. The present staff complement for this division is barely sufficient to continue the day to day operations and would be hard pressed to undertake the development of any new statistical products. The staff is however eager to start the TSA compilation process despite the staff resource challenges.

176. The CSO of Trinidad and Tobago has not been able to hire new permanent staff for several years. Many posts are filled on a temporary basis, and the recruitment situation obviously affects the CSO’s ability to carry out its work and secure the continuity, i.e. the build-up of expertise.

177. The National Accounts Section (NAS) within the Department of Statistics (DOS) is responsible for the compilation of the national accounts in the case of The Bahamas. Staffing in the NAS is strained, making the sustainable
compilation of the TSA challenging. In addition the technical expert allocated 
to the TSA compilation will be on study leave for an extended period of time.

178. Besides human resource issues, all pilot countries have challenges with 
varying degrees of severity with regard to financial resources to undertake 
elaborate surveys. It was recommended to explore combining surveys from 
e.g. the central banks and the statistical offices taking the confidentiality 
issues in consideration.

Adequate response rates

179. The low response rates to surveys and the response burden are some of the 
challenges that the countries face, especially the response from hotels and 
restaurants which form an important industry in the TSA. It was recommended to combine surveys as much as possible to decrease the 
response burden and to rationalize the survey and data collection process to 
accommodate TSAs and other important statistical frameworks. With regard 
to the response rates it was recommended to enforce the Statistics Act as much 
as possible and revise it where necessary e.g. in Barbados.

Training

180. Participation in TSA related meetings of international institutions such as 
UNWTO, CTO, and CARICOM and others as part of the TSA development 
process, in addition to in-country technical assistance is also important in the 
whole process of TSA implementation.

Restructuring of the statistical system

181. It is worth mentioning that both Barbados and Trinidad and Tobago are in the 
process of restructuring their statistical system. The BSS is implementing a 
modernization program with assistance from the IDB which is expected to 
result in an overall improvement in of the statistical system in Barbados. The 
CSOTT is working on a restructuring project with technical assistance from 
Statistics Sweden. Both institutions have indicated that some of the challenges 
will be resolved within the framework of the restructuring projects.

VIII. SUMMARY OF RECOMMENDATIONS AND WAY FORWARD

A. Summary of Recommendations

182. In terms of the way forward it is important for the pilot countries and the 
region to improve the basic data collection activities and to try to close the 
gaps identified in the methodology. For the region is would be useful to note 
the lessons learned from the diagnosis of the situation in the pilot countries. 
The Standing Committee of Caribbean Statisticians (SCCS) meetings
organized by Caricom have proven to be an excellent discussion forum on statistical issues, reaching Caricom member states, associate countries and observer countries.

183. In summary, the following lessons can be derived from the experiences and diagnosis of the TSA implementation in the pilot countries in terms of data sources, methodology, macro-economic frameworks and institutional arrangements.

**Data sources**

- The pilot countries have similar data sources that are used or can be used in the compilation of the TSA, providing a good starting position.
- The countries conduct visitor surveys from which the tourism expenditure can be derived or which can be used in combination with other data sources (e.g. the BOP) and/or with some adjustments to accommodate the completion of table 1.
- Two of the four pilot countries (Jamaica and Trinidad and Tobago) conduct a domestic tourism survey necessary for the estimation of domestic tourism expenditure and outbound tourism expenditure. The information can be supplemented by information from the household expenditure survey.
- All four pilot countries have Supply and Use Tables (SUTs) and conduct regular establishment surveys which are required for the compilation of the production accounts.
- All four pilot countries conduct a Labor Force Survey which - with the necessary adjustments e.g. related to the sample size - can be used for the estimation of employment in the tourism industries.
- Some challenges identified are the definition of the usual environment, challenging response rates esp. for the hotel and restaurants industry, the sample frame of the LFS to measure employment in tourism industries, the recall period for the domestic survey, the specification of taxes and the specification of goods sold in duty free shops.
- Table 2 below contains a summary of the data sources in the pilot countries.

**Table 2: Summary of TSA tables data sources**

<table>
<thead>
<tr>
<th>TABLE</th>
<th>DESCRIPTION</th>
<th>DATA SOURCE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Inbound tourism consumption (by products and categories of visitors)</td>
<td>Tourism Expenditure Survey (With Supply and Use Adjustment)</td>
</tr>
<tr>
<td>2</td>
<td>Domestic tourism expenditure</td>
<td>Household Expenditure Survey , Domestic Tourism expenditure survey</td>
</tr>
<tr>
<td>3</td>
<td>Outbound tourism expenditure</td>
<td>Balance of Payments, Domestic tourism expenditure survey</td>
</tr>
<tr>
<td>4</td>
<td>Internal tourism consumption</td>
<td>Supply and Use Tables , BOP, and HES</td>
</tr>
<tr>
<td>5</td>
<td>Production accounts of tourism industries and other industries</td>
<td>Supply and Use Tables ÷ National Accounts Section ÷ Establishment Surveys</td>
</tr>
<tr>
<td>6</td>
<td>Domestic supply and internal consumption</td>
<td>Supply and Use Tables ÷ National Accounts Section ÷ Establishment Surveys</td>
</tr>
</tbody>
</table>
Visitor surveys

- Include explicit questions in the survey related to the residency of the respondent distinguishing between the country of reference (country where the survey is conducted, other country or leaving the country to establish residency elsewhere). This is a key variable in determining the scope and boundaries of inbound tourism.
- List those countries that are of major importance to the tourism sector. The Bahamas makes a distinction between United States, Canada and other country to be specified. These groups are of particular relevance for the BHS tourism sector.
- Include a specific category related to nationals residing abroad could be important for analytical purposes given the possible difference in spending patterns and the frequency of visits. Jamaica and Barbados for example also include a category related to Jamaicans and Barbadians residing abroad and visiting the countries.
- Inclusion of questions related to the mode of transport is not relevant for the pilot countries given the fact that the main - if not the only - means of transport is by air in the case of inbound and outbound tourism and by sea in the case of cruise tourists. However this is relevant for other countries in the region e.g. Haiti, Suriname, Guyana where transport by land and water is also possible.
- The respondent should be given the opportunity to choose among several options with regard to the number of nights spent in the reference country:
  - None, due to in-transit travel
  - None due to one day visit
  - One or more nights as indicated
- Avoid broad categories of products such as "shopping". Specify the items bought as much as possible, in order to accommodate the product detail in the TSA.
- Ask for the number of persons in the travel party, to be able to calculate average spending
- Make a cross classification of the different accommodation types, the places visited and the number of nights.
- Include questions related to packages. The questionnaire should also include the name of the package to facilitate the breakdown of the items in the package.
• Adjust the questionnaire to accommodate the distinction between number of visitors and number of visits and trips in the questionnaire using the UNWTO questionnaire as guideline.

Methodology

• Make sure that the concepts used such as the concept of visitors, and net valuation of reservation services, etc. are according to international standards using the TSA: RMF 2008 and the ITRS 2008 as a guideline.

• Implement the 2008 SNA system as soon as possible, but if this is not feasible use the 1993 SNA recommendations and implement improvements where necessary.

• The definition of visitors is of crucial importance; pay attention to the special groups identified e.g. students, patients, consultants, transit passengers, crews etc.

• At present, the TSA do not include all the other consumption items mainly consumption in kind, except in the case of the Bahamas which makes adjustments using the estimates from the SUT. Focus on expenditure in cash in the first phase of the implementation process and try to estimate the other consumption items in a next phase.

• The net valuation means that commissions earned by travel agents and other reservation services should be separated out and recorded as being directly sold to visitors. In order to do this, tour packages have to be broken down into their components (e.g., air transportation, accommodation) and recorded as if they too are bought directly by visitors, net of commissions.

• Make the distinction between tourism visits, trips and number of visitors.

• Adjust the international classifications related to products and industries to accommodate the specific local circumstances as was done in all pilot countries.

Macro-economic frameworks

• It is important to have an updated SUT to accommodate the compilation of the production accounts which form the core of the TSA.

• The BOP could form an important data source for the TSA; however the differences in coverage should be taken into account. The BOP focusses on travelers while the TSA focusses on visitors.

Institutional arrangements/ steps in TSA compilation

• Prerequisites and important steps in the TSA compilation identified are:
  • Political support and commitment
  • Improve TSA awareness
  • Installation of an interagency committee
  • Clear assignment of institutional tasks
  • Compilation of an experimental TSA
• Sufficient human and financial resources preferably with a separate unit within the national accounts department consisting of at least three persons and additional staff to conduct the related surveys
• Adequate response rates
• Training and in-county technical assistance
• Restructuring of the statistical system (Barbados and Trinidad and Tobago)

B. Way Forward

Jamaica
184. The main area for improvement that STATIN would like to focus on is related to the improvement of the estimates of tourism employment. All other improvements have a lower priority.

185. The scheduled revision of the national accounts system to 2008 SNA, and the scheduled update of the HES will of course support the overall improvement of the TSA compilation.

186. It was indicated that the JTB and BOJ have the required resources to implement improvements related to the statistical areas that they cover. It is recommended to direct any available resources to STATIN. In terms of staff resources it is recommended to assign at least two dedicated staff persons to the compilation of the TSA.

187. It was indicated that Jamaica can use the expertise in measuring and analyzing the Indirect and Induced effects of Tourism on the economy. This is essential for Jamaica and other countries, which are heavily dependent on the Tourism Sector.

The Bahamas
188. It was indicated that the Bahamas can use the expertise in measuring and analyzing the Indirect and Induced effects of Tourism on the economy. This is essential for The Bahamas and countries like it, which are heavily dependent on the Tourism Sector.

189. The Bahamas and other countries have participated in CTO TSA related meetings in Barbados, Antigua and Trinidad. CTO needs to provide hands-on, in-country technical resources i.e. training and consultancy. Meetings of a few days are not as effective.

190. UNWTO recommends the extraction of the TSA from the Supply & Use Tables. It is necessary to provide technical assistance in the development of
the SUT especially Barbados and Trinidad and Tobago. The level of TSA awareness is regarded as good but could be improved by organizing Public Forums and organizing meetings with stakeholders and data providers preferably with support from CTO.

191. The NAS has indicated that their technical expert will not be able to accommodate any attachments from other pilot countries at this point in time due to her extended study leave.

Trinidad and Tobago

192. In terms of the way forward it is recommended to conduct a further assessment of the TSA readiness once the staff issues are resolved. In order for the technical assistance to be sustainable it is important to have the necessary counterpart in place to transfer the knowledge.

193. Some of the other activities recommended are listed below:

- Improve the coverage of the survey of departing visitors using international best practices.
- Conduct a domestic tourism expenditure survey; a survey was conducted in 2008 by a private consulting firm hired by TDC. The survey covered the period September to October. As indicated in the survey report a total of 1031 respondents were randomly selected. It is recommended to investigate the use of the results of this survey for an initial estimate of domestic tourism expenditure.
- Conduct a complete overhaul and rebasing of the national accounts including basic data sources and statistical infrastructure.
- Compile an updated SUT. The CSO has compiled a SUT for the year 2000 consisting of about 100 products and 54 industries. The SUT needs to be updated using improved methodologies and data sources to be investigated.
- Activate the inter-agency committee; the committee has not been active since 2008.
- Organize a TSA awareness campaign; it was indicated that stakeholders are aware of the importance of the TSA but do not have an idea of the work involved. CTO could assist in the awareness campaign by organizing TSA awareness workshops.

Barbados

194. Based on the discussion of the data sources the technical meeting concluded that it is feasible to start with the compilation of a preliminary/experimental TSA. Given the availability of data the first experimental TSA will be
compiled using 2010 data. The work is expected to be completed by the end of 2014.

195. It is expected that a full-fledged TSA will be in place by the end of 2015. Table 3 contains a draft implementation plan.

196. It was indicated that the CTO can support the implementation process by providing technical assistance in compiling the different tables, especially the updating of the SUT. Another area could be the financing of attachments of BSS staff to receive hands-on training in the subject matter in the more TSA compilation advanced countries.

197. With regard to the TSA awareness it was indicated that it would be useful if the CTO could organize sensitizing workshops for Barbados stakeholders to increase the TSA awareness. The level of awareness is regarded as being moderate. The timing of the awareness campaign should be synchronized with the TSA compilation activities.
<table>
<thead>
<tr>
<th>ACTIVITY</th>
<th>MAIN DATA SOURCE/ AGENCY</th>
<th>DEADLINE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Re-activate and formalize inter-agency committee</td>
<td></td>
<td>March 2013</td>
</tr>
<tr>
<td>Adjust international classifications to the local situation</td>
<td>TSA:RMF combined with national accounts survey data</td>
<td>July 2013</td>
</tr>
<tr>
<td>Inbound tourism expenditure by products and categories of visitors</td>
<td>Expenditure survey</td>
<td></td>
</tr>
<tr>
<td>Domestic tourism expenditure</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Contact BHTA to investigate availability of data</td>
<td>BHTA</td>
<td>July 2013</td>
</tr>
<tr>
<td>- Define criteria for “usual environment”</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Investigate the possibilities for conducting a domestic tourism survey</td>
<td>BSS/CBB</td>
<td>July 2013</td>
</tr>
<tr>
<td>- Investigate other forms of domestic tourism</td>
<td>BSS</td>
<td>Dec 2013</td>
</tr>
<tr>
<td>- Investigate methods for estimating pre-trip and post trip expenditures</td>
<td>BSS</td>
<td>Dec 2013</td>
</tr>
<tr>
<td>Outbound tourism expenditure</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Adjust BOP travel debit data by increasing the coverage of the data</td>
<td>CBB</td>
<td>July 2013</td>
</tr>
<tr>
<td>- Collect data related to residents travelling abroad using adjusted BOP travel debit data and HES data</td>
<td></td>
<td>July 2013</td>
</tr>
<tr>
<td>- Investigate other options for estimating outbound tourism expenditure such as number of departing residents multiplied by a proxy of average spending, and the use of mirror data</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Investigate inclusion of questions related to outbound tourism expenditures in a domestic tourism expenditure survey</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Internal tourism consumption</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Short term: limit estimations to tourism consumption expenditures in cash</td>
<td>Domestic and inbound tourism tables</td>
<td>July 2013</td>
</tr>
<tr>
<td>- Long term: estimate tourism consumption expenditure in kind</td>
<td>National accounts</td>
<td>March 2014</td>
</tr>
<tr>
<td>Production accounts of tourism industries and other industries</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Estimate output by industry using national accounts data</td>
<td>National Accounts</td>
<td>July 2013</td>
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<td>Total domestic supply and internal tourism (at purchasers prices)</td>
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<td>- Investigate ways of improving the response rate e.g. in combination with administrative data sources</td>
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<tr>
<td>- Start compiling a preliminary SUT using available data</td>
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<tr>
<td>- Use detailed financial statements to estimate intermediate consumption structure</td>
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<td>- Conduct an intermediate cost structure survey</td>
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<td>Jan 2014</td>
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<tr>
<td>- Re-introduce the accommodation survey</td>
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<td>Employment in tourism industries</td>
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<td>- Estimate employment in tourism industries using data from the</td>
<td>NIS, earnings per hour, pay as you earn, LFS</td>
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<td>- Investigate the use coverage of the LFS data to be used for specifying employment in the tourism industries</td>
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<td>Collect information related to the non-monetary indicators</td>
<td>Immigration, business registrar, BTA tourism licensing, VAT, NIS</td>
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<td>Compile preliminary TSA</td>
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<td>Compile full TSA</td>
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Annex 1: Selected concepts and definitions

1. Inbound tourism expenditure: expenditure of a non-resident visitor within the economy of reference

2. Outbound tourism expenditure: expenditure of a resident visitor outside the economy of reference

3. Domestic tourism expenditure: expenditure of a resident visitor within the economy of reference

4. Internal tourism expenditure: expenditure of both resident and non-resident visitors within the economy of reference. It is equal to domestic tourism expenditure and inbound tourism expenditure

5. Tourism consumption expenditure equals tourism expenditure plus imputed consumption and other adjustments e.g.

   - The net cost for hosts of receiving visitors in terms of increased expenditure on food, utilities, invitations, presents, etc.
   - The imputed value of barter transactions (for example, temporary exchange of dwellings for vacation purposes);
   - The part of the value of what the System of National Accounts 2008 qualifies as government consumption expenditure on individual non-market services on products such as education, social services, health, museums, recreation services, etc. that can be considered as benefiting visitors and that the System of National Accounts 2008 describes as social transfers in kind

6. Tourism characteristic products are those that satisfy one or both of the following criteria:

   - Tourism expenditure on the product should represent a significant share of total tourism expenditure (share-of-expenditure/demand condition)
   - Tourism expenditure on the product should represent a significant share of the supply of the product in the economy (share-of-supply condition)
7. A visitor is a traveler taking a trip to a main destination outside his/her usual environment, for less than a year, for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited. The main aim of tourism statistics: distinguish/identify visitors from other subsets of travelers. Tourism refers to the activity of visitors. Special groups distinguished are:

- Nationals residing abroad

- Transit passengers: in principle, only those persons making a stop (see par. 2.33) and entering the legal and economic territory should be considered as visitors and their purpose of trip should be transit (see par. 3.17/1.7). Those who do not stay overnight in the country visited should be considered as excursionists, while all those spending at least a night in the country visited should be considered as tourists (see par. 2.13).

- Crews: Crews on public mode of transport, either regular or irregular, should be considered as within their usual environment and thus excluded from visitors. Crews on private mode of transport (corporate jet, yacht, etc.) are considered as visitors.

- Students: those taking short-term courses (less than one year) are visitors, whereas those taking long-term courses (one year or more) should be considered within their usual environment in their place of study and be excluded from visitors although, in both cases, they are considered as non-residents. If administrative data generated by immigration authorities cannot be used to identify the actual situation of foreign students, in particular when they have only a renewable one-year visa, another source of information will be required. Additionally, counts might be made more difficult owing to the fact that students might interrupt their stay with short-term visits either in their country of origin or elsewhere while their place of study continues to be part of their usual environment.

- Patients: in the balance of payments and national accounts, these travelers are considered as residents of their country of origin irrespective of their length of stay in the place where they are receiving their medical treatment. In tourism statistics, those staying one year or more should be considered as within their usual environment. Those staying for less than one year on the other hand should be treated as visitors. The identification of such cases should be developed with the help of immigration authorities.
• Business and professional visitors: Identifying business and professional visitors separately from other travelers coming for work purposes, who are to be considered as non-visitors, usually requires the collection of more information than can be obtained through entry/departure cards. Border workers need first to be identified on the basis of the frequency of their border crossing. Other short-term workers who are not visitors are characterized by the existence of either an explicit or an implicit employer-employee relationship with a resident employer. An explicit relationship will usually be coupled with the requirement of a specific visa, whereas an implicit relationship might be more difficult to identify.
## Annex 2: Overview of in-country meetings and regular correspondence with stakeholders

### October 2012 to July 2013

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Annex 4: TSA readiness assessment questionnaire

1. Has your country started the process of implementing a TSA?

2. If yes, do you have a complete TSA?

3. If not, what reasons can you advance for this?

4. Do you have a functioning inter-agency committee for tourism statistics in general and for the compilation of TSA?

5. If yes, what is its membership? If not it is recommended to establish one; please indicate members from the list:
   - Ministry of Tourism
   - Ministry of Transport
   - National Statistical Office
   - Central Bank
   - National Tourism Organization
   - Civil Aviation Authority
   - Airport Authority
   - Sea port Authority
   - Hotel Association
   - Immigration
   - Others (please specify)

8. What is the level of awareness of the TSA among the tourism stakeholders in your country?

9. Do you have any suggestions as to how TSA awareness can be enhanced in your country, and the region?
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