



TSA 2007

The Jamaican Experience

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Jamaica

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Background

The compilation of the tourism satellite account (TSA) by the Statistical Institute of Jamaica (STATIN) was part of the process to revise the Jamaican System of National Accounts



Background

This process involved:

- compilation of the national accounts in line with the United Nations System of National Accounts 1993 (1993 SNA)
 - included preparation of a Supply and Use Table



Background

The TSA was a response to major stakeholders such as the Ministry of Tourism

- need to measure the economic contribution of tourism to the Jamaican economy
- tourism is not identified as an industry in the national accounts



Background

STATIN received technical assistance from Statistics Sweden to assist with the modernisation of the national accounts including TSA



Background

An inter agency committee was created to guide the development of the TSA. The following agencies were represented:

- Bank of Jamaica
- Planning Institute of Jamaica
- Ministry of Tourism
- Jamaica Tourist Board



Background

- Tourism Product Development Company
- The Jamaica Hotel and Tourist Association
- Institute of Hospitality and Tourism, University of the West Indies

Meetings were held to discuss data sources, concepts and methodology to be used in the development of the TSA



Concepts and Definitions

The Jamaican TSA follows the concepts *and definitions in The Tourism Satellite Account: Recommended Methodological Framework (TSA: RMF 2008)*



Concepts and Definitions

Tourism:

- The activities of persons travelling to and staying in places outside their “usual environment” for not more than twelve consecutive months for leisure, business and other purposes
- The main purpose of the trip should not involve any activities that involve remuneration by a resident entity



Concepts and Definitions

Tourist:

- a visitor who takes a trip outside his/her “usual environment” for leisure, business or other purposes
- exclude travellers such as seasonal workers or sales and delivery men



Concepts and Definitions

The Usual Environment: In determining the usual environment for domestic tourism in Jamaica, the following criteria were used:

- Administrative border which is the parish of residence
- Frequency of travel



Concepts and Definitions

The categories of tourism in the TSA for Jamaica are:

- Inbound Tourism – Non-resident visitors including non-resident Jamaicans
- Domestic Tourism – Resident Jamaicans travelling within Jamaica
- Outbound Tourism – Resident Jamaicans travelling to another country



Concepts and Definitions

Tourism Expenditure:

- expenditure by visitors, as well as, other expenses that are paid for or reimbursed by others
- includes expenditure incurred for and during the trip
- includes expenditure on goods considered as valuable, e.g., jewellery
- excludes real estate and goods bought for resale



Tourism Products

Tourism characteristic products for Jamaica are:

- Accommodation services for visitors
- Food and beverage serving services
- Road passenger transport services
- Air passenger transport services



Tourism Products

Tourism characteristic products continued:

- Passenger transport equipment rental services
- Travel agencies and other reservation services
- Recreational and sporting services
- Cultural services



Tourism Products

Tourism connected products for Jamaica are:

- Goods sold in inbond shops
- Souvenirs, craft items, etc.



Tourism Characteristic Industries in Jamaica

- Hotels, Camp Sites and other Short-Stay Accommodation
- Activities of Restaurants and Lounges
- Activities of Fast Food Outlets, Cafeterias, Snack Counters and Mobile Stands
- Operation of Taxi Cabs



Tourism Characteristic Industries in Jamaica

- International Air Transport
- Internal Air Transport
- Activities of Travel Agencies
- Planners and Organizers of Tours
- Coach Services for Excursions



Tourism Characteristic Industries in Jamaica

- Renting of Land Transport Equipment without Operator
- Other Entertainment Activities including Night Clubs
- Sporting Activities including Members' Clubs
- Tourism Related Recreational Services
- Other Recreational Activities n.e.c.



Data Sources

Inbound tourism expenditure:

- Visitor Expenditure Survey – administered by the Jamaica Tourist Board (JTB)
 - conducted among a sample of departing visitors at both international airports as well as at the cruise ship piers
 - provides expenditure distribution of stopovers and cruise passengers on tourism products



Data Sources

Inbound tourism expenditure (cont'd):

- data on arrivals and duration of stay from the immigration cards and Port Authority compiled by JTB
- Balance of Payments statistics published by Bank of Jamaica provides estimate of expenditure on airfare by stopovers on the national airline



Data Sources

Domestic tourism expenditure:

- Domestic household survey undertaken by STATIN
 - provides expenditure of domestic tourists on tourism products
 - the [questionnaire](#) was designed to collect data for same day, overnight and outbound trips



Data Sources

Domestic tourism expenditure (cont'd):

- Balance of Payments statistics published by Bank of Jamaica provides estimate of expenditure on airfare by residents on foreign airlines
- National Accounts estimates provide expenditure on airfare by residents on the national airline



Data Sources

Tourism Industries

- Production & Income Account
 - Annual National Income Survey for establishments with more than ten employees
 - Administrative records
 - Other surveys and studies for establishments with fewer than ten employees



Data Sources

Tourism Industries (cont'd)

- Supply and Use Table 2000
 - Used for disaggregating intermediate consumption
 - Provided estimate of business consumption on tourism products
 - Assisted in reconciliation of data from the demand and supply





Domestic Household Expenditure Survey

The Jamaica Tourism Expenditure Survey (JTES) was undertaken to obtain data on domestic and outbound tourism. A Screening Form, a Questionnaire and a Manual were designed.



Domestic Household Expenditure Survey

The [screening form](#) was used to determine whether or not any member/s of the household had taken any tourism trips during the reference period.

- the questionnaire was administered only if the respondent had taken any tourism trips





Domestic Household Expenditure Survey

There was a pre-test of the questionnaire followed by a debriefing after which recommendations were made for the main survey. Training was then conducted for the field staff.



Domestic Household Expenditure Survey

The main survey was conducted in two phases, the first started in October 2007 and the second in March 2008

- data captured for the past six months
- administered to a sample of households across Jamaica



TSA Publication

The Tourism Satellite Account 2007 Jamaica

- Launched in April 2009
- Measured the direct economic contribution of tourism to the Jamaican economy
- Tourism direct GDP was 7.3 % of Jamaica's total GDP
- Inbound tourism accounted for 84.6 % of Tourism direct GDP



Tables presented in the TSA

- Table 1: Inbound Tourism Expenditure (presented as Table 7)
- Table 2: Domestic Tourism Expenditure (presented as Table 9)
- Table 4: Internal Tourism Expenditure (presented as Table 2)



Tables presented in the TSA

- Table 6: Domestic Supply & Internal Tourism Consumption (presented as Table 4)
- Table 7: Employment in Tourism Industries (presented as Table 6)
- Table 5: Production Account of Tourism Industries & Other Industries – not published but released to main stakeholders and available upon request



Challenges in compilation of TSA

Recall by respondent in the domestic survey:

- the survey sought information for the past six months, however respondents had difficulty in recalling expenditure for some items.
- for the TSA 2010 information was collected for the past two months





Challenges in compilation of TSA

Low response rate from tourism establishments to the annual national income survey

- To overcome this data from the Tax Payer Audit & Assessment Department was used



Challenges in compilation of TSA

Measurement of employment in tourism industries requires more detailed analysis for future publications

- The sample size used in the Labour Force Survey does not facilitate disaggregating of the tourism industries.



THANK YOU

