TOURISM STATELLITE ACCOUNTS AND POLICY FORMULATION

Prepared by: Jhannelle-Rae Bowie, Senior Director, Tourism Economics and Facilitation
CURRENT TOURISM STATISTICS

Jamaica
CURRENT TOURISM STATISTICS

Tourism Statistics are collected from different stakeholders in Jamaica.

- Jamaica Tourist Board
- Statistical Institute of Jamaica
- Planning Institute of Jamaica
- Tax Administration of Jamaica
- Bank of Jamaica
- Jamaica Promotions Corporation
JAMAICA TOURIST BOARD

- Visitor Arrivals
- Profile of Visitor- age group, source market, purpose of visit, length of stay, area of stay, spend per tourist
- Foreign Exchange earnings
- Room Inventory
- Employment in Accommodations Sub-sector
- Visitor Experience & Satisfaction
• Tourism Labour Force
• Tourism Contribution to GDP (%,$-constant and current)
• Tourism Characteristics (accommodation, attraction, transportation, recreational, food and beverage, etc)
• Real Value Added from Tourism
• Tourism Expenditure (Domestic vs Inbound)
• Rate of Growth of Tourism
TAX ADMINISTRATION OF JAMAICA

• General Consumption Tax
• Guest Accommodation Room Tax
• Revenue for Tourism Entities
BANK OF JAMAICA AND JAMAICA PROMOTIONS COMPANY (JAMPRO)

- Foreign Direct Investments
- Foreign Exchange Earnings by Major Sources
TOURISM SATELLITE ACCOUNTS

What information do we get from the TSA?

• Tourism’s Direct Contribution to GDP (inbound and domestic)
• Tourism Expenditure (inbound-stopover and cruise and domestic)
• Tourism Value Added at Current and Constant Prices by characteristics
• Tourism Characteristics (contribution to GDP by sub-sector)
• Tourism’s Rate of Growth
What information do we get from the Tourism Satellite Accounts?

Tourism Characteristics:

- Accommodation services for visitors: 49%
- Food and beverage services: 17%
- Passenger transport services: 10%
- Transport equipment rental services: 7%
- Travel agencies and other reservation services: 2%
- Tourism related recreational services: 1%
- Recreational, sports and cultural services: 1%
TOURISM SATELLITE ACCOUNTS

What information do we get from the Tourism Satellite Accounts?

Tourism's Direct Contribution to GDP at Constant Prices showing contribution from Accommodation Services & Other Tourism Services

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Direct Contribution</th>
<th>Accommodation Direct Contribution</th>
<th>Other Tourism Direct Contribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>3.4</td>
<td>3.4</td>
<td>0.0</td>
</tr>
<tr>
<td>2010</td>
<td>3.6</td>
<td>3.6</td>
<td>0.0</td>
</tr>
<tr>
<td>2011</td>
<td>3.6</td>
<td>3.6</td>
<td>0.0</td>
</tr>
<tr>
<td>2012</td>
<td>3.7</td>
<td>3.7</td>
<td>0.0</td>
</tr>
<tr>
<td>2013</td>
<td>3.7</td>
<td>3.7</td>
<td>0.0</td>
</tr>
<tr>
<td>2014</td>
<td>3.8</td>
<td>4.1</td>
<td>0.7</td>
</tr>
<tr>
<td>2015</td>
<td>4.1</td>
<td>4.1</td>
<td>0.0</td>
</tr>
<tr>
<td>2016</td>
<td>3.9</td>
<td>4.2</td>
<td>0.7</td>
</tr>
<tr>
<td>2017</td>
<td>4.1</td>
<td>4.2</td>
<td>0.7</td>
</tr>
<tr>
<td>2018</td>
<td>4.2</td>
<td>4.2</td>
<td>0.7</td>
</tr>
<tr>
<td>2019</td>
<td>4.2</td>
<td>4.2</td>
<td>0.7</td>
</tr>
</tbody>
</table>
TOURISM SATELLITE ACCOUNTS

TSA and Policies/Programmes

- The TSA allow us to assess the direct contribution of the tourism sector to the economy
- It allows us to assess this contribution by sub-sector- the Ministry is able to assess the performance of sub-sectors. e.g. ground transportation providers, attractions, etc.
- With the TSA we are able to focus on sub-sectors that need growth and policy intervention
- It allows us to assess our policies with the level of growth of the sector.
GAPS IN THE TSA

Although the Ministry has priority areas in tourism statistics, there are gaps with the TSA:

- TSA only captures direct impact of the tourism sector
- The Ministry is unable to accurately assess the impact of the following:
  1) Tourism Linkages Sectors
  2) Indirect and Induced impacts of the tourism sectors
  3) Leakages and Retention Rate
# PRIORITY AREAS FOR TOURISM STATISTICS

<table>
<thead>
<tr>
<th>Areas</th>
<th>Responsible Agencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retention &amp; Leakages of the Tourism Dollar</td>
<td>STATIN, Bank of Jamaica</td>
</tr>
<tr>
<td>Measurement of Sustainable Tourism</td>
<td>UNWTO, Ministry of Tourism, STATIN</td>
</tr>
<tr>
<td>Tourism Incentives &amp; Benefits</td>
<td>Jamaica Customs Agency, Ministry of Finance, Tax Administration of Jamaica</td>
</tr>
<tr>
<td>Induced &amp; Indirect Impacts of Tourism</td>
<td>STATIN, Tourism Enhancement Fund</td>
</tr>
<tr>
<td>Linkages in the Tourism Sector</td>
<td>STATIN, Tourism Enhancement Fund, Ministry of Industry, Commerce, Agriculture and Fisheries</td>
</tr>
<tr>
<td>Labour Market Studies</td>
<td>STATIN, Ministry of Tourism</td>
</tr>
<tr>
<td>Investments in Cultural Assets</td>
<td>JAMPRO, Jamaica Hotel &amp; Tourist Association</td>
</tr>
<tr>
<td>Tourism Socio-Economic Impact</td>
<td>STATIN, PIOJ, TAJ, BOJ, MICAF, Ministry of Tourism</td>
</tr>
</tbody>
</table>
# TOURISM DATA COLLECTION AND ANALYSIS

## New Programme

### Programme Description
- Responsible for ensuring access to high-quality tourism market intelligence and research relevant to planning the growth and sustainable development of the Jamaican tourism sector.

- Includes the development of a formal research strategy that provides the industry and Government with relevant and timely information and analysis on the evolving structure and performance of the sector.

- Use qualitative and quantitative research methods and statistical tools to collect and analyze tourism data from a broad range of sources to support policy making, marketing and sector development.

### Programme Objectives
- 1) To develop a framework to guide the Ministry and its agencies in the capture, analysis and dissemination of tourism market intelligence and other relevant research.

- 2) To conduct ongoing research and produce standardized reports that guide policy and decision making.

- 3) To conduct ad hoc research and produce timely reports that guide decision-making in response to emerging risks and trends.

- 4) To utilize new and emerging data source to complement traditional sources of data.
DATA ANALYSIS & REPORTING

REPORTS

• Monthly Dashboards
• Quarterly Bulletins
• Annual State of the Industry Report
• Annual Tourism Risk Assessment & Risk Register
• One Report Every 5 Years- Investment, Carrying Capacity, Economic Impact Assessment, etc
The Ministry of Tourism, Jamaica is committed to partnering with the UNWTO and its members in achieving our objectives for comprehensive data collection, analysis and reporting, towards the sustainable development of the tourism sector.
THANK YOU

Jhanelle- Rae Bowie,
Senior Director, Tourism Economics and Facilitation

+1 876 353-1752
Jhanelle-rae.bowie@mot.gov.jm
www.mot.gov.jm