

# SUMMARY

The following notes attempt to summarise some of the information contained in the material submitted by Commonwealth Governments, which is comparable and available. Tables 1 and 2 at the end of this summary give some indication of the importance of the tourist industry to each Commonwealth country, by showing the number of tourist arrivals and the proportion of each country's foreign exchange earnings derived from tourism.

## 1. National Tourist Offices

Of the twenty-eight Commonwealth countries (existing as at December, 1969) fifteen - Australia, Barbados, Britain, Ceylon, Cyprus, Ghana, Guyana, Jamaica, Kenya, Lesotho, Malta, Sierra Leone, Singapore, Tanzania and Trinidad and Tobago - have established statutory authorities expressly to deal with tourist development (or in the case of Guyana, a committee within a statutory development corporation). In some cases, these are virtually Government Departments as Boards or Corporations are subject to the general and special directives of a Minister in charge of tourism. In addition, in Britain and Tanzania, certain Government Departments are also concerned with the administration of tourist development.

It might be noted that while The Gambia has established a tourist board, this has been set up as a non-statutory Committee.

Nine other Commonwealth countries, namely, Canada, India, Malawi, Malaysia, Mauritius, New Zealand, Pakistan, Uganda and Zambia, have established Government Departments responsible for administering the tourist industry. (In the cases of Canada, Cyprus and Malawi, these are sections within a government Department). In addition, Malawi also has a tourist board which acts in an advisory capacity only.

Nigeria is the only country, whose national tourist office is a private non-profit making organisation, although the government is represented within the organisation and financially supports it to a large degree.

Botswana and Swaziland are the only countries which have not yet established national tourist offices, although government Departments administering related sectors, e.g. Department of Information and Wild Life, deal to some extent with tourist development.

## 2. Overseas Representation

The effectiveness of each national tourist organisation depends to a large extent on the amount of promotion undertaken in other countries, particularly in those countries where a large potential or established market exists.

It appears that, while information can be acquired from the Commonwealth diplomatic and consular missions abroad, many Commonwealth countries have established further agencies for promoting their tourist industries abroad. For example, seventeen countries - Australia, Barbados, Britain, Canada, Ceylon, Cyprus, India, Jamaica, Kenya, Malaysia, Malta,

New Zealand, Singapore, Tanzania, Trinidad and Tobago, Uganda and Zambia - have established offices in other countries specifically for tourist promotion; and while many of these countries also promote tourism by co-operating with their national airlines or commercial organisations abroad, the remaining eleven Commonwealth countries - Botswana, The Gambia, Ghana; Guyana, Lesotho, Malawi, Mauritius, Nigeria, Pakistan, Sierra Leone and Swaziland appear to rely solely on the use of diplomatic and commercial channels for promoting tourism, at this stage.

3. Internal and infra-structural Organisation

Not comparable.

4. Government Participation

(i) Ownership or shares in hotels:

The Governments of twenty-five Commonwealth countries own hotels or have shares in the ownership of hotels, motels or rest houses. In the cases of Britain, Ceylon, Ghana, India, Kenya, New Zealand, Sierra Leone, Tanzania, Uganda and Zambia, this is on a relatively significant scale, while in Australia, Barbados, Botswana, Canada, Cyprus, Guyana, Jamaica, Lesotho, Malawi, Malaysia, Malta, Nigeria, Pakistan, Singapore and Trinidad and Tobago, the Governments have very minor interests in hotels.

All hotels are privately owned in The Gambia, Mauritius and Swaziland.

(ii) Financial assistance specifically available (e.g. loans and guarantees):

The Governments of twenty-one countries - Australia, Barbados, Botswana, Britain, Canada, Ceylon, Cyprus, Ghana, India, Jamaica, Kenya, Malaysia, Malawi, Malta, Mauritius, New Zealand, Nigeria, Singapore, Tanzania, Trinidad and Tobago and Zambia - offer some financial assistance to the industry, mainly for hotel development. (In Australia and Canada this assistance is afforded largely by State or Provincial Governments rather than by the Federal Governments).

(iii) Income tax and other concessions on hotel or to other tourist income:

Tax incentives, such as "tax-free holidays", reduced property tax, investment allowances or special depreciation allowances are granted by twenty of the twenty-eight Commonwealth countries.

The remaining eight countries - Australia, Britain, Canada, The Gambia, Ghana, Lesotho, Mauritius and New Zealand - do not grant tax concessions to their tourist industries.

- (iv) Import duty concessions on material and equipment for hotel and other tourist construction:

Almost half the Commonwealth Governments (thirteen) grant duty concessions on material or equipment for the construction of new hotels or the extension of existing ones. These Governments are - Barbados, Ceylon, Cyprus, The Gambia, Guyana, Jamaica, Malawi, Malta, Mauritius, Pakistan, Sierra Leone, Singapore (free-port), and Trinidad and Tobago.

- (v) Provision of public funds for publicity purposes:

Twenty-six of the twenty-eight Commonwealth Governments provide funds for publicity and promotional purposes.

There was insufficient information available on Ghana and Guyana, the two remaining Commonwealth countries, to determine whether money was made available for this purpose by their Governments.

Additional information summarising the material on the Associated States and British Dependent Territories is included below.

1. National Tourist Offices

Of these twenty-one States and Territories, six have set up Government Departments responsible for tourist development. These are the Bahamas, Bermuda, British Honduras, Gibraltar, Seychelles and Fiji (which has also set up a private non-profit-making Bureau for promotional purposes). Ten countries - Antigua, British Solomon Islands, Cayman Islands, Dominica, Grenada, Hong Kong, Montserrat, St. Kitts-Nevis-Anguilla, St. Lucia and St. Vincent have established statutory authorities to look after their tourist interests. In the New Hebrides, the Chamber of Commerce is responsible for tourism, and receives official assistance for this purpose. A study of promotional activities in neighbouring territories is being conducted for the government of the Gilbert and Ellice Islands. The remaining two territories, the British Virgin Islands and Turks and Caicos Islands have not yet established national tourist offices, although certain government officers are concerned with, and involved in promoting tourism to these islands.

2. Overseas Representation

In the majority of the Associated States and British Dependent Territories, the tourist industries are not yet sufficiently developed to warrant the establishment of tourist offices abroad. However, eight of these countries, Bahamas, Bermuda, British Virgin Islands, Cayman Islands, Fiji, Gibraltar, Hong Kong and Seychelles have established overseas offices. Six other territories, British Honduras, British Solomon Islands, Gibraltar, Montserrat, the New Hebrides and St. Vincent are promoting their tourist industries through public relations, travel or commercial firms abroad.

3. Internal and Infra-structural Organisation

Not comparable.

4. Government Participation

(i) Ownership or shares in hotels:

In Antigua, Dominica, the Gilbert and Ellice Islands and the Seychelles, the Governments have minor financial interests in hotels. In all other countries all hotels are privately owned.

(ii) Financial assistance specifically available (e.g. loans and guarantees):

Financial assistance is afforded to the industry by the Governments of British Honduras, British Solomon Islands, Fiji, Gibraltar, Gilbert and Ellice Islands and the Seychelles only.

(iii) Income Tax and other concessions on hotel or other tourist income:

Fourteen of the Associated States and British Dependent Territories offer tax concessions to the hotel industry, while in five other countries - Bahamas, Bermuda, Cayman Islands, the New Hebrides and the Turks and Caicos Islands, there is no income tax, which gives an incentive to hotel development. In the remaining two territories, the Gilbert and Ellice Islands and Hong Kong, no tax concessions are granted to the industry.

(iv) Import duty concessions on material and equipment for hotel or other tourist construction:

Sixteen of the twenty-one countries offer duty concessions; they are Antigua, Bahamas, British Honduras, British Virgin Islands, Cayman Islands, Dominica, the Gilbert and Ellice Islands, Grenada, Montserrat, the New Hebrides, St. Kitts-Nevis-Anguilla, St. Lucia, St. Vincent, the Seychelles, Tonga and the Turks and Caicos Islands.

(v) Provision of public funds for publicity purposes:

Turks and Caicos is the only Territory which does not appear to provide public funds for this purpose.

Acknowledgement must be given to the IUOTO publication - "Aims, Functions and Fields of Competence of National Tourist Offices" (1966), which was originally used as one of the sources on which this document is based.