

Australia

Australia's tourist potential depends partly on its sunny climate, its vast "out-back" areas, particularly the central area of the country around Ayers Rock, its extensive surfing beaches and the resort areas of the Great Barrier Reef. Also, the sophisticated cities are attractions to people from countries such as New Zealand and the warmth and friendliness of the Australian people are conducive to tourism.

1. Value and Extent of the Tourist Industry

| | |
|-----------------------------|---------------------------|
| Number of tourist arrivals* | 1966 : 221,000 |
| | 1967 : 253,000 |
| | 1968 : 326,000 |
| | 1969 : 390,000 (estimate) |

Mainly from New Zealand and Oceania, United Kingdom and America.

| | |
|--|-------------------|
| Foreign exchange receipts from tourism** | 1966 : \$A 63 m. |
| | 1967 : \$A 76 m. |
| | 1968 : \$A 100 m. |
| | 1969 : \$A 121 m. |

| | |
|--|-------------|
| As a percentage of total foreign exchange of goods and services | 1966 : 1.8% |
| | 1967 : 2.0% |
| | 1968 : 2.6% |
| | 1969 : 2.7% |

2. Official Promotional Organisation

Important changes in the structure and organisation of the Australian tourist industry occurred during 1967. In this year an Act was passed "to establish an Australian Tourist Commission for the purpose of the encouragement of visits to Australia and travel in Australia, by people from other countries".

The seven members of the Australian Tourist Commission are drawn from representatives of the Australian Government, the State Governments and the tourist industry.

* Including direct shipping passengers and U.S. Servicemen on R. & R.

** Receipts include spendings by U.S. Servicemen on "Rest and Recreation" Leave in Australia as follows : 7000 in 1967 spending an estimated \$2 m., 63,000 in 1968 spending an estimated \$16 m. and 85,000 in 1969 spending an estimated \$21 m.

The Commission is a Statutory Authority financed by the Commonwealth Government and responsible to the Minister-in-Charge of Tourist Activities, under the Minister for Trade and Industry. The Commission makes use of a full range of promotional techniques and media designed to encourage international visitors to travel to Australia. A specialised staff and a well established organization exists with offices in Melbourne (Head Office), Sydney, New York, San Francisco, Los Angeles, London, Auckland and Tokyo. An office is being opened in Frankfurt in May, 1970.

3. Internal and Infra-Structural Organisation

Each of the six States and two mainland territories has established an official government tourist body.

In addition to operating as travel bureaux, the State and Territory bodies take part in development and improvement activities relative to tourist and recreational attractions within their areas.

The Australian Federal Government, State Governments and Territory Administrations meet annually to discuss internal tourism developments.

All of these bodies carry on promotion and publicity activities in various forms to attract visitors to their State. Most of them have encouraged and given support to regional tourist organisations or local groups within their States by financial grants, technical assistance or sharing publicity costs.

All major banks with branches throughout Australia act as travel agencies and usually sell through their State headquarters.

State Automobile Clubs have membership of almost 2 million; their city-headquarters serve members as travel agencies.

Domestic airlines are aggressive wholesale and retail travel agents, primarily for internal air travel.

There are also independent travel agents, most of whom belong to the Australian Federation of Travel Agents, and who hold appointments from various carrier conferences.

4. Government Participation

(i) Ownership or shares in hotels:

All but a few hotels are privately owned and most of the improvements and expansion of facilities have been done by private enterprise without Government aid or assistance.

The greater part of finance for new hotels was obtained through conventional mortgage loans, coupled with investment capital through sales of shares through the Stock Exchange.

Some of the State Government Tourist Bureaux operate accommodation and other facilities and a hotel is operated by one State Railway Department.

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

See 4(vi)

- (iii) Income tax and other concessions on hotel income:

None.

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

None.

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

Since 1967 the Australian Tourist Commission has been responsible for overseas promotion. The appropriations for recent financial years (the Australian Financial Year is from 1 July - 30 June) have been

| | |
|---------|----------------|
| 1967/68 | \$A 1,520,000 |
| 1968/69 | \$A 1,750,000 |
| 1969/70 | \$A 2,100,000. |

The Commission enters into joint projects with industry and other government bodies, which involve substantial amounts of additional funds from these bodies.

- (vi) Government expenditure on infra-structure:

The Commonwealth Government has no special provision for financially assisting infra-structure tourist developments except in the Northern Territory where the Northern Territory Reserves Board makes loans for this purpose.

- Tasmania - The State Tourist Accommodation Loans Act since its establishment in 1945, has approved loans of almost \$3 million, \$A 400,000 of this being during 1968/69. It has been most effective in encouraging needed new accommodation development.
- Western Australia - The State Government has given grants under its Industry Assistance Act for small amounts towards improvements of accommodation.
- Queensland - The State Government has made some small loans to operators in the Great Barrier Reef area. Also under the State Industries Assistance Act.
- New South Wales - The State Department of Tourism operates and finances facilities at three cave resorts and, subject to the

availability of funds, subsidises the activities of recognised regional tourist organizations.

- | | |
|-----------------|---|
| South Australia | - The State Government Tourist Bureau administers, finances and maintains twenty-six national pleasure resorts throughout the State, including accommodation at Wilpena Pound, Flinders Ranges. |
| Victoria | - The State Ministry of Tourism, created in 1970, provides funds for various tourist developments. |

5. Action Taken During the Current Year

Two extensive tourist development surveys of the Central Australia region were carried out during 1969 under the sponsorship of the Australian Tourist Commission, the Commonwealth Department of the Interior and the Northern Territory Reserves Board. The recommendations contained in the reports of these surveys are being examined closely.

The Australian Tourist Commission completed a Programme for Australia's Tourist Development for consideration by the Commonwealth Government.

Overseas visitor facilitation at ports of entry continued to receive attention from the Commonwealth Government and new measures designed to speed up the clearance of passengers and baggage on arrival in Australia were introduced by the Customs authorities. Visa formalities for overseas visitors were also eased by the Commonwealth Department of Immigration.

The Australian National Travel Association embarked upon a "See Australia" programme which will involve the spending of over \$ 1 million on a wide range of activities over three years. The programme is to feature a saturation advertising and publicity campaign aimed at encouraging Australians to see and get to know more of their own country.

6. Future Plans for the Industry

As evidenced by the establishment of the Australian Tourist Commission, the Australian Government is increasing the tempo of its overseas promotional efforts to attract greater numbers of tourists to Australia.

The Federal Government's responsibility relates primarily to overseas promotion. Development of accommodation and related facilities for tourists within Australia is a matter for the State Governments and the accommodation and related industries themselves. In this connection the Australian National Travel Organisation has decided to remain in existence as the industry organization, concentrating its efforts on developments within Australia.

The Territory of Papua & New Guinea

Papua and New Guinea's tourist potential lies in its wide variety of scenic attractions ranging from spectacular mountain ranges to great river valleys, dense jungles, tropical plantations and colourful coral islands. In this setting the people and their culture provide an attraction unique in the Pacific if not in the world.

The annual Highlands show, which alternates between Goroka and Mt. Hagen, is probably the most exciting spectacle for tourists in the South Pacific.

1. Value and Extent of the Tourist Industry

Statistics of visitor arrivals in accordance with the IUOTO definition are as follows;

| | | |
|------|---|---------------|
| 1966 | : | 14,059 |
| 1967 | : | 16,370 |
| 1968 | : | 20,100 |
| 1969 | : | not available |

Australia is the main source of tourists and a sizeable number comes from New Zealand.

Precise information is not available on foreign exchange receipts from tourism, but for the year ended June 30th, 1968, it is estimated at \$6 million.

2. Official Promotional Organisation

The Papua and New Guinea Tourist Board, a statutory body charged with the responsibility of promoting and developing the tourist industry, was established in 1966. At the same time, a Tourism Section within the Industrial Development Division, Department of Trade and Industry, was established. This section is mainly concerned with servicing the needs of investors in hotel accommodation and other tourist industries, in compiling statistics on tourism in the Territory, and in promoting the involvement of the indigenous people in tourist activities.

The Tourist Board consists of (a) twelve members of whom at least eight have their usual place of residence in a place in the Territory other than Port Moresby, and who represent the fields of trade, commerce or transport connected with the tourist industry or represent interests otherwise connected with that industry and (b) one member who is an officer of the Public Service, appointed by the Administrator in Council and (c) the Executive Director of the Board.

The functions of the Board are (a) to develop and foster tourism in the Territory; (b) to stimulate local and regional organisations in the acceptance and value of the tourist industry; (c) to establish and operate or assist tourist bureaux and (d) to manage property acquired by the Board.

The funds of the Board are derived as follows :

- (a) such sums of money as are appropriated by the House of Assembly;
- (b) such sums as are loaned to the Board; and
- (c) such other sums of money as are received, whether by gift or otherwise.

There is considerable liaison between the private sector of the industry and the Administration.

3. Internal and Infra-structural Organisation

Private tourist promotional organisations at various centres e.g. Rabaul, Port Moresby, Madang, the Highlands, Lae and the Eastern Highlands co-operate with the PNG Tourist Board and assist in developing local attractions and facilities for tourists.

Group tours are conducted by two of the Territory airlines: Trans Australia Airlines and Ansett-MAL. The international air service operated by Qantas from Sydney through Port Moresby to Manila and Hong Kong, which commenced in September 1967, greatly assists the development of tourism.

In November 1967, Fiji Airlines introduced turbo-prop services on their Fiji-British Solomon Islands schedules with connections in Honiara by TAA to Port Moresby.

4. Government Participation

- (i) Ownership or shares in hotels:
None.
- (ii) Financial assistance specifically available:
The Papua and New Guinea Development Bank provides loan finance to assist the provision of tourist accommodation and facilities.
- (iii) Income tax and other concessions on hotel income:
None; but it should be noted that income tax is only about half that of Australia.
- (iv) Import duty concessions on material and equipment for hotel and other tourist construction:
None; rates on most items vary between free and 17½%.
- (v) Provision of public funds for publicity purposes:
The Tourist Board receives a grant from the Administration. The grant is provided each year in the Papua-New Guinea budget. In 1967/68 the grant was \$50,000.

(vi) **Government expenditure on infra-structure:**

There is no special provision by the Administration for the development of infra-structure for the tourist industry, but provision and maintenance of facilities for the general development of the Island also aid the tourist industry.

5. Action Taken During the Current Year

Not available at time of publication.

6. Future Plans for the Industry

The Administration and Tourist Bureau plan to encourage the development of tourism as a major source of income on the Island.

The Territory of Norfolk Island

Norfolk Island's tourist potential depends largely on its equable climate, beautiful scenery and pleasantly informal atmosphere. There are many relics of early Australian convict history and the 1856 transfer of the descendants of the Bounty mutineers from Pitcairn Island to Norfolk Island. The duty free shops on the Island are a major attraction.

1. Value and Extent of the Tourist Industry

| | | | |
|---------------------|------|---|---------------|
| Number of tourists: | 1966 | : | 6,200 |
| | 1967 | : | 8,422 |
| | 1968 | : | 7,902 |
| | 1969 | : | not available |

The decline in the number of tourists in 1968 was caused by a drop in the number from New Zealand because of the New Zealand Government's restrictions on currency for tourist purposes.

The amount of foreign exchange receipts from tourism is not available, but tourism is the major source of income on the Island.

2. Official Promotional Organisation

None.

3. Internal and Infra-structural Organisation

The Norfolk Island Tourist Bureau is a private organisation, membership of which is open to organisations and individuals interested in the promotion of tourism on the Island. The Bureau receives an annual subsidy from the Administration. The subsidy for 1967/68 was \$6,000. The Bureau issues promotional brochures and posters and distributes accommodation lists to travel agents and individual enquirers.

4. Government Participation

- (i) Ownership or shares in hotels:
None.
- (ii) Financial assistance specifically available:
None.
- (iii) Income tax and other concessions on hotel income:
There is no income tax on Norfolk Island.
- (iv) Import duty concessions:
None; but rates are very low.

(v) Provision of public funds for publicity purposes:
The administration makes an annual subsidy to the Tourist Bureau.

(vi) Government expenditure on infra-structure:
The Administration makes no special provision for the provision of infra-structure for the tourist industry, but the increasing provisions of roads, telecommunications, airports, etc. in the general economic development of the Territory also opens up new possibilities for the tourist industry.

5. Action Taken During the Current Year

Not available at time of publication.

6. Future Plans for the Industry

The Tourist Board has a promotional campaign with the publication of tourist pamphlets and posters for distribution to travel agents outside the Territory. Regional tourist associations have been set up in the main Territory towns to provide information for visitors and to develop local tourist facilities and attractions. The Board has joined the Pacific Area Travel Association as a full government member and the participation of the Territory, as a full Government member in international tourist activities, is expected to increase in the future.

Barbados

The tourist potential of Barbados consists largely of its equable climate with temperatures ranging between 78° and 86°F with a high sunshine record; excellent beaches and ideal conditions for all aquatic sports; easy accessibility to and from the United States, Canada and South America and a wide range of hotels in every category. Barbados also forms part of the chain of islands (Windward and Leeward Islands) which are also particularly suitable for sailing, yachting and other aquatic sports.

1. Value and Extent of the Tourist Industry

Within the past twenty years tourism has come to play a major part in the economy of Barbados.

With an average annual growth rate of 15% the industry has been the most dynamic sector of the economy. It has been primarily responsible for the continued growth of the Gross Domestic Product.

The number of visitors, the gross earnings of tourism and its contribution to the Gross Domestic Product have exhibited a remarkable rise in recent years.

The following table shows the extent and value of the industry for the past five years.

| <u>Year</u> | <u>Number of Visitors</u> | <u>No. of Cruise Ship Passengers</u> | <u>Estimated Revenue (EC \$)</u> |
|-------------|---------------------------|--------------------------------------|----------------------------------|
| 1965 | 68,418 | 52,664 | 26.1 million |
| 1966 | 79,104 | 51,593 | 29.1 million |
| 1967 | 91,565 | 45,451 | 33.5 million |
| 1968 | 115,697 | 75,981 | 53.9 million |
| 1969 | n.a. | n.a. | n.a. |

Tourism currently provides direct employment for approximately 6,000 people and indirectly for approximately 9,000 on the island.

Visitors to Barbados come mainly from the United States and Canada but there has been a steady increase from the United Kingdom and the Caribbean Islands.

The following table shows visitors' arrivals by country of residence:-

| <u>Year</u> | <u>U.S.A.</u> | <u>Canada</u> | <u>U.K.</u> | <u>W.I.</u> | <u>Others</u> |
|-------------|---------------|---------------|-------------|-------------|---------------|
| 1965 | 19,811 | 14,165 | 6,673 | 21,893 | 5,876 |
| 1966 | 24,377 | 16,372 | 8,304 | 23,149 | 4,253 |
| 1967 | 29,813 | 18,293 | 6,622 | 23,732 | 10,105 |
| 1968 | 41,287 | 27,879 | 11,493 | 26,136 | 6,542 |
| 1969 | n.a. | n.a. | n.a. | n.a. | n.a. |

Foreign exchange receipts from tourism were estimated at

approximately E.C. \$ 34.3 million in 1967. This amounted to about one quarter of the country's total foreign exchange earnings.

2. Official Promotional Organisation

The Barbados Tourist Board, established by statutory authority in 1958, is the island's official tourist promotion organization. Apart from its Head office in Bridgetown, Barbados, the Board maintains offices in Toronto, Canada and New York, USA.

The Board comprises a Chairman, a deputy Chairman and fifteen members from both the Government and the private sector. Its functions are:-

- (a) to develop all aspects of the tourist industry of the island and to promote the efficiency of the industry;
- (b) to adopt all such measures as it may deem fit to advertise and publicise the island as a tourist resort throughout the year;
- (c) to promote and secure such increased shipping and airline facilities as will tend to increase tourist traffic to the island;
- (d) to secure the most favourable arrangements for the entry of tourists into Barbados;
- (e) to encourage by such measures as it may deem fit the development of such amenities in the island as may be calculated to enhance the attractiveness of the island to tourists;
- (f) to undertake such research, experiments and operations as may appear to it to be necessary to improve the basis of the tourist industry and to control and eliminate any undesirable factors that may effect the industry;
- (g) to foster an understanding within the island of the importance and economic benefit of the tourist industry;
- (h) to provide training facilities for hotel staff;
- (i) to classify hotels according to the standards of the amenities provided;
- (j) to make all such enquiries and to collect all such information as it may think necessary for the purpose of carrying out its duty under this section;
- (k) generally to take all such other lawful measures as it may consider likely to assist it in carrying out most effectively the purposes of the Tourist Board Act.

The Tourist Board in co-operation with the Barbados Hotel Association, the airlines serving the island, the local Ground Tour Operators and Water Sports Operators undertake yearly promotional tours of the United States, Canada, Venezuela and the Caribbean. These tours take the form of presentations to travel agents, the travel trade, travel press and airline personnel as well as receptions for, and calls on agents, and are supported by a special programme of advertising in leading newspapers, magazines and on radio and television.

3. Internal and Infra-Structural Organisation

The Tourist Board includes representatives from the Barbados Hotel Association, Taxi Owners, the airlines serving the island, local businessmen and the Ministry of Trade and Tourism.

The Board also issues information regarding hotel rates twice annually covering periods mid-December to mid-April and mid-April to mid-December, respectively.

Listed accommodation is classified Luxury, "A" Class, "B" Class, Guest Houses and Other Accommodation which includes furnished apartments and cottages.

The following table shows accommodation at the end of the year 1968:-

| <u>Luxury</u> | <u>"A" Class</u> | <u>"B" Class</u> | <u>Guest House</u> | <u>Other</u> |
|---------------|------------------|------------------|--------------------|--------------|
| 1,503 | 1,483 | 779 | 378 | 1,227 |

A Hotel Training School operated in collaboration with the Barbados Hotel Association was established in 1964 for training workers engaged in the industry. Scholarships for training at management level have also been awarded Barbadians under the Canadian Technical Assistance Programme.

Barbados has a modern international airport at Seawell which services the most modern jet aircraft. Expansion continues apace with developments in air communications.

There is also a modern deep-water harbour dredged to a minimum depth of thirty-two feet. The harbour was opened in May, 1961 and offers efficient docking and bunkering facilities.

A meteorological institute has also been established in the island to serve the Eastern Caribbean.

4. Government Participation

(i) Ownership or shares in hotels:

All hotels are privately owned with the exception of the Barbados Hilton which is owned by the Government and operated by Hilton International.

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

The Barbados Development Bank is empowered to make or guarantee loans to hoteliers to assist in the development of the hotel industry.

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

The Hotel Aids Act allows a tax-free period of up to ten years after the hotel is established.

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

The Hotel Aids Act, 1967 provides for the duty-free importation of building materials, hotel equipment, hotel furnishings and furniture, provided that none of these items is at the time of importation being produced in Barbados. These benefits apply to the construction of new hotels and to the extension or renovation of existing ones.

(v) Provision of public funds for publicity purposes:

Budget allocations to the Tourist Board for the development of the industry have been as follows:-

| | |
|---------|-----------------|
| 1966-67 | E.C. \$ 750,000 |
| 1967-68 | 877,000 |
| 1968-69 | 804,346 |
| 1969-70 | 966,000 |
| 1970-71 | 1,449,368 |

(vi) Government expenditure on infra-structure:

The Hilton Hotel which was opened in November 1966 was constructed at a cost of E.C. \$ 10 million.

A road development programme included extensions to the runway at Seawell and construction of access roads.

The construction of the East Coast Road which has opened a new area for the delight of the tourists.

Facilities, including changing and restaurant facilities, are provided at various beaches for the increasing number of cruise ship passengers.

5. Action Taken During the Current Year

The Board concentrated its efforts in the prime North American markets. The successful Barbados Bonanza promotion was repeated in Canada for the sixth consecutive year and in the United States for the second year with greater success.

The Bonanza promotion again incorporated a comprehensive and specialised programme of advertising and public relations with a sales tour undertaken by the Board in conjunction with its overseas offices, the

Barbados Hotel Association and the Barbados Approved Wholesalers and certain of the airlines serving the island. The Chamber of Commerce participated in the promotion.

The following table indicates the growth of summer business from 1964 when the Barbados Bonanza was introduced:-

| | <u>1964</u> | <u>1965</u> | <u>1966</u> | <u>1967</u> | <u>1968</u> |
|----------|-------------|-------------|-------------|-------------|-------------|
| Visitors | 36,266 | 43,013 | 50,414 | 54,898 | 66,974 |

Visitor arrivals during the summer of 1968 increased by 22% over the previous year and with the exception of November, every summer month showed an increase over the same month of the preceding year.

And for the first time every hotel in Barbados was opened to business during the summer.

In addition to the Bonanza promotion, the Board, through its local and overseas offices participated in several co-operative advertising projects.

6. Future Plans for the Industry

Projections for 1969 through 1971 are for an increase from 115,000 to approximately 160,000 visitors.

Increased air services, larger aircraft, and the tendency towards charters and group travel will assist in our reaching the projected increase.

The Board anticipates that the next five years will be a period of continuous growth for the tourist industry.

But, every year the competition for the tourist dollar becomes greater with countries spending more and more of their national budgets to attract visitors, particularly from North America. The competition is made keener when air fares to a particular destination are increased, while cheaper fares, whether offered in the form of group fares or otherwise, are available to other destinations. Air fares to Barbados from North America are expected to increase substantially during the coming year. The effect this could have on the above projections must not be overlooked.

The US market is vast and much business can be obtained. To stem the increasing competition and to make Barbados more competitive amongst resorts and especially those which have the advantage of lower air fares, it is vital that greater advertising in the US market be done during the period.

In so far as Canada is concerned, the Board is satisfied that business from this country will continue to flow for some time on the momentum which has been built up provided there is a continuance of the present effort.

The Board looks to the new markets of continental Europe and South America as areas prime for development as soon as air transportation is available on a basis which will induce the free movement of people. The Board however feels that to exploit these new areas to the fullest advantage substantial promotional funds will be necessary when the time comes.

At the moment Venezuela is again ready to be exploited on a bigger scale and it is expected that Scandinavia will provide Barbados with a reasonable market particularly during the summer period.

The Caribbean area will continue to be promoted including Guyana and Surinam although the large-scale development in other Caribbean territories will offer more competition than in the past.

The Board is however convinced that the main solution to this problem lies in its ability to exploit the Canadian and the USA markets to the fullest.

The challenge lies in Barbados being able to develop the tourist plant in an orderly fashion to accommodate the growth.

The provision of additional hotel accommodation will not in itself be sufficient. The Board considers it essential that greater attention be paid to the provision of proper restaurant facilities; improvement of entertainment; proper control of beaches; the swift processing of passenger traffic both at Seawell Airport and the Bridgetown Harbour; and improvement of transport and shopping services.

While the Board looks with confidence to the future, it nevertheless feels that the stage has now been reached in the development of tourism which makes it imperative that there should be greater co-ordination not only amongst those sectors directly involved, but also in those areas which have indirect bearing on the development of the industry.

The Board considers it to be vital, therefore, that there should be established adequate machinery for the co-ordination, and direction of all of the policies, plans and efforts for its future development, thus ensuring that there is a move forward with the single objective of providing a flourishing and lasting industry for the benefit of all Barbadians.

Despite the growth of the tourist industry, the major problem continues to be the differential in hotel occupancy between the winter and summer seasons, which result in seasonal employment for workers in most hotels.

Although there has been much improvement in summer business, the additional accommodation constantly being provided mainly to meet the demands of peak winter months further aggravates the problem of low occupancy in hotels during the summer months and clearly supports the Tourist Board's efforts in this direction.

The main objective of the Board therefore, is to concentrate its financial and other resources almost entirely on the business during the summer months with a view to improving the occupancy in hotels and consequently to providing permanent employment for the workers.

Botswana

Botswana's tourist potential depends largely on its proximity to the Victoria Falls and its game reserves, although there are other features of archaeological, historical and scenic value which can be developed to attract more tourists.

1. Value and Extent of the Tourist Industry

Ordinary tourist visitors to Botswana during 1969 were estimated to be over 7,000. The average length of stay is estimated at six days and the average daily expenditure at R7.00. This gives a total expenditure by ordinary tourists of R294,000.

As well as ordinary tourists there were in the region of 130 tourist hunters from overseas whose total expenditure was over R600,000. There were also 800 tourist hunters from South Africa who spent a total of approximately R160,000.

The aim is to increase the number of ordinary tourist visitors to at least 22,000 by 1973/74 by providing more tourist accommodation and other tourist facilities. This will mean that the total expenditure by ordinary tourists will rise to over R800,000 per annum. Expenditure by tourist hunters, both from overseas and from the South African region, is unlikely to increase in this period.

2. Official Promotional Organisation

The Ministry of Commerce, Industry and Water Affairs is responsible for the development of tourism. The Department actually dealing with tourists and tourist promotion is the Department of Wildlife and National Parks. The Information Department also provides general information on Botswana. Botswana Airways Corporation (in which Government is the main shareholder) is also doing tourist promotion work from its Johannesburg office.

3. Internal and Infra-Structural Organisation

Botswana's main tourist attractions are in the northern section of the country and include the Chobe National Park and the Moremi Wildlife Reserve situated on the edge of the Okavango Swamps. These areas are served by six hunting safari companies and four organisations offering photographic tours.

A new all-weather road between Francistown and Maun, which was financed by a \$3.6 million loan from US International Development Agency, has recently been completed and has made Maun more accessible from Francistown. In addition to this, an access road from Victoria Falls to Kasane in the Chobe National Park has recently been opened. This should greatly facilitate the movements of tourists from both Francistown and the Victoria Falls.

The link road between Kasane and Maun was started during 1969 and should be finished during 1970. This road will be open during the tourist season months, that is the dry season. This route should greatly increase the length of stay of tourists in Botswana as it will provide an attractive circular route from Victoria Falls to Kasane to Maun and back to Francistown.

Hotels - There are twelve hotels in Botswana, of which only three could be considered second class hotels by international standards, the remainder being third class and below. Only one of these belongs to Government, but is privately operated, the rest being privately owned.

The proposed tourist lodge at the entrance to the Chobe National Park should be completed before the end of 1971.

During 1969 a luxury safari lodge, with twenty beds, was opened on the Khwai River to the north of the Moremi Game Reserve. There are plans to expand the Khwai Lodge.

During 1969 a fishing camp was also opened at Shakawe and this has attracted a good deal of trade.

Travel Agents - One travel agent operates in the whole of Botswana, viz. Botswana Airways Corporation, whose main offices are in Gaborone and Johannesburg.

Air Lines - Botswana Airways Corporation supplies limited internal services and weekly flights to Zambia and South Africa. South African Airways maintains a flight between Johannesburg and Gaborone three times a week.

4. Government Participation

(i) Ownership or shares in hotels:

Botswana Government owns one hotel at present. This is the President Hotel in Gaborone, which is leased to a private hotelier. All other hotels are privately owned. Government will have a 20% share in the management company of the new Chobe Lodge.

It is also Government's intention to obtain shareholdings in all new hotel investments made in Botswana.

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

Loans may, under certain circumstances, be obtained from the National Development Bank.

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

A special depreciation allowance on hotel equipment is made and it is the intention to grant special allowances for hotel investment in the future.

(iv) Import duty concessions on material and equipment:

At present there are no concessions for the import of tourist material and equipment.

(v) Provision of public funds for publicity purposes:

Funds voted to the Department of Wildlife and National Parks, the Government Printer and the Information Department are used to a certain extent for publicity purposes.

(vi) Government expenditure on infra-structure:

During 1969 Government continued expenditure on the development of the Chobe National Park and on the link road between the Chobe National Park and Maun. The building of two rest camps in the Chobe Park was continued and these will be available for use in 1970.

Two road-building units have been purchased during 1969 and will be used for tourist development in northern Botswana.

As mentioned above, Government has made a considerable investment in the Botswana Airways Corporation, which should make a considerable contribution in promoting tourism in Botswana.

5. Action Taken During the Current Year

During 1969 the Commonwealth Secretariat arranged for a tourist expert to do a survey of Botswana and he has, as a result, produced a report on the development of the tourist industry in Botswana 1970-75. It is hoped to start implementing most of the recommendations of the report and the report has formed a valuable basis for future planning.

Government has taken active steps during the year to encourage private investment in the tourist industry in Botswana. Negotiations have been completed on the building of the lodge in the Chobe National Park and preliminary negotiations have begun with a view to building a further tourist lodge on the Botletle River, between Francistown and Maun, and also the building of a large tourist hotel and casino at Gaborone.

All hunting safari companies have been encouraged to make investments in the non-hunting field and three companies have already begun doing this.

6. Future Plans for the Industry

It is planned to set up a National Tourist Office and the Commonwealth Secretariat have been requested to help with technical assistance. This National Tourist Office will eventually become a National Tourist Board which will be an autonomous statutory body. This organisation will take over the promotion of tourism in Botswana.

Plans for the gazetting of a further two major national parks and one game reserve should be implemented during 1970. It is also planned to expand the Moremi Wildlife Reserve and to link it with the Chobe National Park.

As mentioned above, plans are being made to increase the tourist accommodation available in the country as a whole.

To date, Botswana has done very little advertising in the tourist field. This has been because of the complete lack of suitable tourist accommodation. It is hoped that during 1970 and 1971 it will be possible to start an advertising campaign to assist the investors in tourist accommodation in promoting tourism in Botswana. This may involve opening a Tourist Office in Johannesburg as well as London at a later date.

Britain

Britain's tourist attraction lies in its places of historical and cultural interest, the variety of its scenery and its unique traditions contrasting with the modern "swinging Britain" image. Britain also has the advantage of intensive ethnic and cultural links with many overseas countries, particularly those which form part of the Commonwealth.

1. Value and Extent of the Tourist Industry

| | | |
|---------------------------|-------|-------------|
| Number of tourist visits: | 1966: | 4.0 million |
| | 1967: | 4.3 million |
| | 1968: | 4.8 million |
| | 1969: | 5.8 million |

The visitors come mainly from the USA, the Commonwealth, France, the Federal Republic of Germany and the Irish Republic.

Receipts from tourism (excluding fares):

| | |
|-------|--------------|
| 1966: | £219 million |
| 1967: | £236 million |
| 1968: | £282 million |
| 1969: | £355 million |

Receipts from tourism as a percentage of total receipts:

| | |
|-------|---------------|
| 1966: | 2.7 |
| 1967: | 2.9 |
| 1968: | 2.8 |
| 1969: | not available |

2. Official Promotional Organisation

Great Britain now has a statutory tourist organisation established. This is composed of four boards, the British Tourist Authority, which is the body responsible for all overseas tourist promotion, the English, Scottish and Wales Tourist Boards each responsible for tourism in their respective countries. These statutory bodies have taken over most of the functions previously carried out by the voluntary British Travel Association and Scottish and Wales Tourist Boards. The Government Department responsible for tourism at national level is the Board of Trade although the Secretaries of State for Scotland and Wales have responsibility for tourism development in their respective countries.

The British Tourist Authority is made up of a Chairman and up to five members appointed by the Board of Trade together with three ex-officio members, the chairmen of the English, Scottish and Wales Tourist Boards. The English, Scottish and Wales Tourist Boards consist of a chairman and up to six members appointed by the Board of Trade and the Secretaries of State for Scotland and Wales respectively.

The functions of the British Tourist Authority are to encourage people to visit Great Britain and people living in Great Britain to take their holidays there; and to encourage the provision of new tourist amenities and facilities in Great Britain. The English, Scottish and Wales Tourist Boards have similar functions with regard to their own countries.

The Authority's and Boards' activities include:-

- (i) Publicity and advertising - the British Tourist Authority is responsible for promoting Britain overseas and maintains offices in the United States of America, Canada, France, Federal Republic of Germany, Argentina, Australia, Belgium, Brazil, Denmark, the Netherlands, Italy, Japan, Mexico, South Africa, Sweden, Switzerland and is also represented in New Zealand. The English, Scottish and Wales Tourist Boards are responsible for promoting their own areas within Great Britain;
- (ii) the provision of advisory and information services for the benefit of tourists;
- (iii) research into the needs of tourists and forecasting future trends in tourism;
- (iv) providing assistance to and cooperating with other organisations or individuals carrying out any similar work. Financial assistance may also be given by the Authority and Boards for particular projects to increase tourist facilities and amenities;
- (v) the English, Scottish and Wales Tourist Boards have, in addition, the responsibility for administering a scheme of financial assistance to hotels provided for in Part II of the Development of Tourism Act (see section 5).

Northern Ireland already has a separate statutory Board set up under the Development of Tourist Traffic Act 1948. Jersey, Guernsey and the Isle of Man also have Tourism Committees established under their own legislation.

3. Internal and Infra-structural Organisation

The following voluntary regional tourist associations have been set up to promote the tourist attractions of their areas and to publicise these within Britain:- The London Tourist Board, the English Lakes Counties Travel Association, the Northumberland and Durham Travel Association, the South West Travel Association and the Yorkshire Travel Association.

4. Government Participation

- (i) Ownership or shares in hotels:
Some hotels are wholly or partly owned by state owned undertakings (e.g. British Transport Hotels and hotels owned by the national airlines, BOAC and BEA).
- (ii) Financial assistance specifically available (grants and loans):
See section 5.

- (iii) Income tax and other concessions on hotel income:
None, but from 2 September 1968 some hotels in certain rural parts of Development Areas have been eligible for a refund of their payments of Selective Employment Tax.
- (iv) Import duty concessions on material and equipment for hotel or other tourist construction:
None.
- (v) Provisions of public funds for publicity purposes:
The British Tourist Authority and the English, Scottish and Wales Tourist Boards are financed mainly by a Government Grant-in-Aid. In the financial year 1968/69 the statutory tourist organisation was not in existence and the British Travel Association received a grant-in-aid of some £2.9 million towards a total budget of £3.7 million.
- (vi) Government expenditure on infra-structure:
Several Government Departments assist tourism indirectly through the provision of communications and social, sporting, cultural and recreational activities. Local authorities have powers to provide amenities and facilities for sport and recreation. A number of statutory bodies e.g. British Waterways Board, the Countryside Commissions and the Forestry Commission have also been charged with safeguarding or developing amenities. Certain statutory bodies set up to carry out regional development (e.g. Highlands and Islands Development Board) have powers to provide facilities for tourists.

5. Action Taken During the Current Year

During 1969, the Development of Tourism Act - the first piece of major legislation in Great Britain dealing specifically with tourism - was passed by Parliament. It came into force on 25 August of that year. The Act provides in Part I for the new statutory organisation comprising the British Tourist Authority and the English, Scottish and Wales Tourist Boards. In Part II it provides for a scheme of financial assistance to hotels. Grants (and in certain cases, loans) are available towards the capital cost of new hotels and certain extensions and improvements which satisfy the provisions of the Act. Eligible projects will qualify for grants of 20% (25% in Development Areas, i.e. designated areas having a higher than average level of unemployment and other economic difficulties). The grants are subject to a ceiling of £1,000 (£1,250 in Development Areas) for each new letting bedroom. Loan assistance of up to 30% for new hotels and 50% for certain extensions and improvements is also available in suitable cases.

The Act also provides enabling powers for the registration, classification or grading by the Tourist Boards of tourist accommodation. The Act does not prescribe a predetermined scheme of registration but provides for the making of schemes by subordinate legislation.

The Act also enables provision to be made by subordinate legislation for hotels and other establishments providing sleeping accommodation to be

required to display or otherwise notify their room charges.

6. Future Plans for the Industry

The Government will look to the new tourist organisation for advice and recommendations as to how Britain's tourist industry can best be developed.

Canada

Canada's tourist potential depends largely on its proximity to the USA and its many natural endowments such as the Canadian Rockies, the Great Lakes, Niagara Falls, and its vast National Parks and reserves.

1. Value and Extent of the Tourist Industry

| | | |
|---|-----------|-------------|
| Number of tourist arrivals, (including those from USA but excluding same day excursionists) | 1966: | 13,228,463 |
| | 1967: | 16,054,715 |
| | 1968: | 12,070,322 |
| | 1969: | 12,775,483 |
| Foreign exchange receipts from tourism, (includes receipts from same day excursionists) | 1966: C\$ | 840 million |
| | 1967: C\$ | 1,318 " |
| | 1968: C\$ | 978 " |
| | 1969: C\$ | 1,079 " |
| Receipts from tourism as a percentage of total foreign exchange earnings, | 1966: | 6.3% |
| | 1967: | 8.7% |
| | 1968: | 5.7% |
| | 1969: | 5.7% |

Chief Countries of origin for Tourists (a)

| | <u>1967</u> | <u>1968</u> | <u>1969</u> |
|----------------|-------------|-------------|-------------|
| United States | 39,975,640 | 34,775,772 | 35,765,659 |
| United Kingdom | 180,000 | 115,234 | 143,562 |
| Germany | 42,254 | 27,647 | 35,313 |
| France | 71,909 | 23,499 | 32,529 |
| Netherlands | 19,459 | 18,171 | 23,304 |
| Japan | 18,979 | 12,515 | 18,525 |
| Italy | 17,388 | 12,101 | 15,577 |
| Australia | 14,142 | 12,852 | 14,697 |
| Mexico | 19,102 | 7,261 | 10,019 |
| Jamaica | 8,753 | 6,907 | 9,422 |

(a) Includes same day excursionists.

Tourism and exports of newsprint have contributed equally to foreign exchange earnings over the past two years (1968 and 1969). These industries are only exceeded by the export of automobile accessories and chassis as the top foreign exchange earners.

2. Official Promotional and Research Organisation

Office of Tourism:

The Office of Tourism works to promote travel to and within Canada and to further develop the travel industry in Canada with the objective of making an optimum contribution to national prosperity. The Office serves as a centre of information and as a focal point for contact with the

federal government on tourism matters.

The Office of Tourism, in addition to a General Directorate, comprises the Canadian Government Travel Bureau, a promotional organisation; and, the Travel Industry Branch, a research and development organisation.

The General Directorate gives central executive direction to the Office.

Canadian Government Travel Bureau:

The Canadian Government Travel Bureau promotes travel to Canada from abroad with the view to increasing Canada's foreign exchange earnings derived from visitors' expenditures (currently over \$1 billion annually). It promotes travel within Canada by residents, for the direct socio-economic benefits including an offset to expenditures by Canadians on travel abroad (currently over \$1.2 billion annually). The Bureau coordinates its promotional activities with like operations of provincial and private sector interests concerned. Most of its activities are centered at the Bureau headquarters in Ottawa. The Bureau also operates 24 travel promotion offices in 8 countries abroad.

Travel Industry Branch:

The Travel Industry Branch conducts research and makes recommendations concerning Canada's ability to meet the demands of the traveller (whether visitor or resident). The industry includes Canada's natural vacation attractions, man-made facilities, services available to the traveller, activities and events available to the traveller, and sales and distribution outlets. The Travel Industry Branch also conducts studies and evaluates international travel developments, the programs and plans of international organizations concerned with tourism and the policies and practices of foreign governments in regard to their respective travel industries. The objective of these studies and evaluation is to identify matters having significance for tourism in Canada and the Canadian travel industry. The Travel Industry Branch works closely with other federal departments and agencies whose operations bear on tourism; the provincial tourism authorities; and, with the private sector of the Canadian travel industry.

Representation Abroad - The Canadian Government Travel Bureau has established offices at the following places - New York, Boston, Philadelphia, Washington, Rochester, Cleveland, Detroit, Cincinnati, Chicago, Pittsburg, Minneapolis, Seattle, San Francisco, Los Angeles, Mexico City, Tokyo, Sydney, London, Paris, Frankfurt, and Amsterdam.

The Bureau employs the services of publicity and public relations firms for its presentations abroad and operates with Canadian diplomatic consular and trade representatives for distribution of public material or information. The Office of Tourism represents Canada at international conferences and is a member of the American Society of Travel Agents (ASTA), the Pacific Area Travel Association (PATA), the International Union of Official Travel Organizations (IUOTO), and the Tourism Committee of the Organization for Economic Cooperation and Development (OECD).

Facilitation - The Office of Tourism is actively engaged in the abolition,

relaxation and simplification of entry and departure facilities and in this respect adheres to international conventions - application of their regulations in favour of tourism.

3. Internal and Infra-structural Organisation

Canadian Tourist Organisation (CTA):

This Organisation is comprised of 550 members, chiefly from the private sector of the industry in Canada. Federal, provincial and municipal governments are also represented. The Association has a 40-man Board of Directors. The Board comprises two 20-man committees of equal rank - one to formulate policy and the other an executive committee. The President is elected annually with a permanent secretariat located in Toronto. The CTA is financed largely by membership fees and annual government grants. The General Director of the Office of Tourism is a member of the Board of Directors of CTA (it may be noted that the Canadian Tourist Association will make application for a change of name to the Travel Industry Association of Canada - TIAC).

Canadian Government Exhibition Commission (CGEC):

Organises, designs, produces and administers Canadian exhibits at fairs and exhibitions abroad in which the Canadian Government participates. It also advises private exhibitors and their agents of the most effective way of displaying Canadian products at trade fairs. The Canadian Government Exhibition Commission prepares domestic exhibitions for government departments and agencies. It is also responsible for international fairs and exhibitions held in Canada, financed and sponsored by the Canadian Government.

Research - The Federal-Provincial Conference on Tourism is chiefly a forum for federal and provincial government tourist officials to coordinate their views. At the 1966 Conference a Travel Research Planning Committee with a Technical Sub-Committee was established. There is, therefore, an active and represented forum for travel research in Canada, which can effect coordination of various projects undertaken individually or cooperatively by provincial or federal governments and by the various sectors of the travel industry.

Promotion - As previously mentioned, the Canadian Government Travel Bureau maintains a considerable budget for publicity promotion. In 1968/69 the Bureau distributed 15 million pieces of promotion material costing approximately \$1.2 million. The same amount is expected to be expended during the fiscal year 1969/70.

In 1968/69 over \$3 million was spent on advertising to promote the Canadian tourist industry and to promote domestic tourism. In 1969/70 advertising expenditures increased to almost \$3.5 million.

The expenditures of the "Explore Canada Campaign" amounted to \$260,000 in 1968/69 and again in 1970. The direct mail campaign expenditures in 1968/69 amounted to \$150,000 and in 1969/70, \$125,000.

The total federal budget for tourism during 1968/69 amounted to \$10.2 million and in 1969/70, \$11.1 million.

Many of the large transportation companies promote Canadian tourism abroad. Air Canada and Canadian Pacific Airlines, for example, have advertising, publicity and promotional programs in wide-spread areas of the world which they directly serve as well as in certain areas where they are "off-line".

The Canadian National and Canadian Pacific Railways also engage in promotion abroad. Skiing, ice carnivals, fishing, scenic touring and hiking are some of the activities advertised.

4. Government Participation

In addition to the active participation outlined, the federal government also participates in the following:

(i) Ownership or shares in hotels:

There are approximately 20,000 hotels and motels in Canada. The Canadian National Railway - a government-owned corporation, owns nine large hotels in Canada, seven of which are operated by the Canadian National Railways and two of which are operated by management contract.

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

At the federal government level as well as in several provinces there are loan provisions which either include or were created specifically for the tourist industry.

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

There is no special tax or other concessions specifically directed at the tourist industry.

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

There are no such concessions limited to the travel industry.

(v) Government expenditure on infra-structure:

The Federal-Provincial Conference, held annually since 1945 and sponsored by the Office of Tourism is a forum of working sessions between representatives of the provincial and federal tourist authorities and transportation companies to coordinate and review tourism in Canada under the following subjects; advertising, travel research, planned development and progress reports on national programs.

The Office of Tourism contributes financially to the Canadian Tourist Association. These funds support a training program "Project Hospitality" and other projects. The Office of Tourism also contributes to other organizations in the field of tourism by supporting and co-sponsoring on an ad hoc basis, employees' training programs for management in the accommodation, food and beverage sectors of the industry.

The Canadian Government Travel Bureau sponsors convention seminars. The purpose of these seminars is to study and evaluate the convention business as an aspect of tourism in Canada. In February of 1970, the Office of Tourism and the Canadian Tourist Association held the first Travel Trade Congress in Canada. The prime objective of the Congress was "to improve Canada's competitive position in the world tour market with particular attention to package tours.

The operation and maintenance of national and historic parks in Canada during 1968/69 resulted in an expenditure of \$20.6 million while the capital expenditure for the same year amounted to \$15.7 million. The forecast program for national and historic parks provide for substantial growth throughout the coming 5-year period.

5. Action Taken During the Current Year

See Section 3 above.

6. Future Plans of the Industry

Canada, having already achieved a billion dollar income from non-resident travel in Canada, aims to earn foreign exchange of \$2 billion by 1977. The combined foreign and domestic travel in Canada is forecast to reach \$7 billion by 1980, i.e. \$ 2½ billion in non-residents' income and \$4½ billion in Canadian residents' income. To achieve this goal, plans are now being implemented for the promotion of domestic travel; surveying the need for financial assistance in the accommodation sector of the industry; and, to determine the more precise volume, value and patterns of domestic travel by means of a Canadian Travel Survey.

Ceylon

The development of tourism in Ceylon is assisted by a number of favourable factors. These include the strategic location of the island on round-the-world flight routes, both eastward from Europe and westward from the Pacific area. (During 1969, the number of international flights through Ceylon increased from 18 to 24 per week; including regional flights the total number of flights to Colombo now totals 48 per week). The visitor attractions of the country are varied. There are beach resorts and mountain resorts, as well as historic archeological sites, such as the mountain fortress of Sigiriya and the ancient cities of Anuradhapura and Polonnaruwa. Recreational potentials include beach and sea sports as well as golf and wild-life photography. For entertainment there are the traditional festivals, modern theatre and the wonderful traditions of dancing with special forms that have been developed in the different regions and schools. Shopping opportunities range from the well-known gems of Ceylon to the products of indigenous arts and crafts. Recent developments that have attained international distinction are high-grade handloom cloths and beautiful batiks. There is an extensive road and rail network with suitable accommodation both in the cities and in places of archaeological and other interest. The Government of Ceylon has embarked on a policy of encouraging the growth of tourism on the basis of planned development.

1. Value and Extent of the Tourist Industry

Statistics of tourist arrivals to Ceylon during recent years are shown below:

| <u>Year</u> | <u>Arrivals</u> | <u>% Change over Preceding Year</u> | <u>Index - 1963=100</u> |
|-------------|-----------------|---|-----------------------------|
| 1966 | 18,969 | - 4.1 | 102.9 |
| 1967 | 23,666 | + 24.8 | 128.3 |
| 1968 | 28,272 | + 19.5 | 153.3 |
| 1969 | 40,204 | + 42.2 | 218.0 |

During the period 1963-1966, tourist traffic to Ceylon remained at a static level of around 19,000 arrivals a year. The year 1967 showed for the first time, a significant upward trend in traffic largely as a result of the initial impact of the promotional activities undertaken by the new tourist organisation namely, The Ceylon Tourist Board, which was sent up by Act of Parliament in May, 1966.

The upward trend in traffic that emerged in 1967 continued over the period 1968-1969 and the tourist arrivals to Ceylon in 1969 increased to a record total of 40,204, which represented an increase of 118.0% when compared with the base year 1963. During the period 1966-69 tourist traffic to Ceylon has been expanding at an average annual rate of 28.4% - from 18,969 in 1966 to 40,204 in 1969. This means that Ceylon has been able to more than double its traffic over a period of three years. The rate of expansion of traffic to Ceylon during the period 1966-1969 (28.4%) was much higher than the rate of expansion of traffic to the South Asian Region

during the same period (17-18%) and the traffic to the South Asian Region expanded at a faster rate than the rate of expansion of world tourism in this period (5-6%).

Foreign exchange earnings from tourism as shown in the Balance of Payments Account for the period 1966-1969 are given below:

| <u>Year</u> | <u>Earnings Rs Millions</u> | <u>Earnings (US \$ 1000)</u> |
|-------------|---------------------------------|----------------------------------|
| 1966 | 6.5 | 1,285 |
| 1967 | 7.5 | 1,211 |
| 1968 | 10.3 | 1,731 |
| 1969 | 16.9 | 2,840 |

These figures do not reflect the actual visitor-expenditure in Ceylon as a proportion of it is lost to legitimate banking channels through illicit trafficking in foreign currencies.

The introduction in 1968 of a scheme whereby tourists received an enhanced rate of exchange for their foreign currency helped in large measure to curb this loss and it is now estimated that the drain into illicit traffic has been reduced from what it was around firstly, namely 70% to about 30% today.

Earnings from tourism in actual foreign exchange terms, have been increasing at an average annual rate of 30.2% during the period 1966-1969. The rate of increase in tourism earnings recorded during this period was slightly higher than the rate of increase in traffic recorded during the same period (28.4%).

Earnings from tourism as a percentage of total foreign exchange earnings are shown below:

| <u>Year</u> | <u>% of Total Earnings</u> |
|-------------|----------------------------|
| 1966 | 0.35 |
| 1967 | 0.40 |
| 1968 | 0.47 |
| 1969 | 0.80 |

2. Official Promotional Organisation

The Ceylon Tourist Board which is a Statutory Public Corporation is the authority responsible for the promotion and development of tourism in Ceylon. It is subject to the general and special directions of the Minister in Charge of Tourism.

The functions of the Board include the establishment, maintenance and operation of adequate and attractive tourist services and the making of such services available to those engaged in tourist travel promotion; the providing of financial assistance to local authorities, other corporations and bodies of persons operating or maintaining tourist services; encouraging and co-operating with any tourist travel and other agencies in the promotion and publicising of the attractions of the island; assisting in the training of persons in work connected with tourist travel and tourist services; preparation of general or special tourist schemes as necessary for the establish-

me development and control of tourist resorts, tourist services and employment of persons in such services.

Promotional activities - The Board's policy has been to gradually build up publicity overseas in its principal markets so as to make its full impact when more and better hotels would be ready and other facilities and services will also be available in greater measure. The Board's advertising campaign in 1968, was confined to trade advertising, and was extended in 1969 to limited consumer advertising, in USA, Japan and Australia. An extensive slide-sound presentation was conducted in eight major cities in the Federal Republic of Germany. Other promotional measures were public relations drives; publicity through visits of foreign travel writers. The activities undertaken by the Board included advertising; public relations work; publicity through visits of foreign travel writers, photographers, television and film producers; educational tours for foreign travel agents and editorial publicity through a monthly newsletter, quarterly magazine and regular feature releases. A number of new publications in the form of booklets, brochures, folders, posters and maps were produced and are being distributed on a regular mailing list to persons interested in promoting traffic to Ceylon.

Representation Abroad - The Board is represented on international travel and tourist bodies. It has its own Information Offices in New York (to cover North America) and Frankfurt (to cover the European region) and plans to open other such offices in its principal markets. At present public relations activities, the supplying of tourist information and the distribution of publicity material is undertaken through Ceylon's Missions abroad and professional firms employed for this purpose.

The Director of the office in Frankfurt co-ordinates and supervises the entire promotional campaigns in the United Kingdom and the Continent.

Of the professional organisations associated with the work of tourism in the country, mention must be made of the following: The Ceylon Tourist Hotels Association serves the catering industry, and the Association of Ceylon Travel Agents the travel trade. The Association for the Promotion of Tourism consists of members of business establishments engaged in or interested in promoting all features of tourism. The Board of Airline Representatives, the Ceylon Steamer Agents' Association and the Ceylon Chapter of the Pacific Area Travel Association are the other trade organisations associated with the tourist industry. These bodies work closely with the Tourist Board.

The Board assisted the trade in matters of tourist promotion, advertising and travel abroad for participation at international conferences and familiarisation tours and secured from Government the release of foreign exchange for the importation of hotel requirements, transport requirements and other items required for the provision of facilities to tourists.

Vocational Training - The Ceylon Hotel School and School of Tourism run by the Ceylon Tourist Board has a three-year General Catering Course for the training of hotel personnel. Under technical training aid agreements, the services of foreign experts have been obtained for the School and a panel of qualified Ceylonese lecturers assist them. The School is well-equipped and provides practical training for students in a 10-roomed hotel, a modern restaurant, bar and banquet hall. Outstanding students are awarded scholarships for further 'in-service' training abroad in five-star hotels and recognised hotel schools.

Craft Courses - A series of part-time Craft and Refresher Courses in Cookery, Restaurant Service, Bar Service and Hotel Reception were conducted for those employed in the hotel trade and also for new entrants to the industry. Courses have been held for hotel waiters, hotel cooks and resthouse keepers; also for railway and hospital catering personnel. These courses will be intensified in 1970.

Guides - Fourteen guide-lecturers trained by the Tourist Board in 1967 were available to the trade to serve as qualified guides. It is proposed to conduct the second course for guide lecturers in mid'70 where persons fluent in foreign languages, in addition to their fluency in English, will be given preference when being selected for training.

Still available for tourists in Colombo are the services of licensed guides. These guides cater mostly to passengers aboard ships calling at Colombo and their services are limited to city tours in Colombo.

Facilitation - Accepted and in force is the international definition of 'Tourist' by all government departments, a simplified procedure for the issue of visas, the principle of 'oral' baggage declaration, the allowing of importation into the country of a duty-free quota under personal effects in keeping with the area of allowances allowed internationally, the abolition of the practice of medical surveillance, the reduction by 50% of landing and delivery charges on duty and shipping charges on departure of motor vehicles temporarily imported on Carnet d'Passage.

Following pressure by a broad-based organisation sponsored by the Board called the National Facilitation Committee, visa fees for tourists have been waived till 31st December, 1971.

Again, at the instance of the National Facilitation Committee the Controller of Exchange has allowed that both transit passengers and bona-fide tourists be allowed to reconvert into foreign currency unexpended Ceylon rupees to the equivalent of Rs 300.

Recommendations have been made for the use of a new and revised Embarkation/Disembarkation Card which will bring it both in format and content, in line with IUOTO specifications.

3. Infra-Structural Organisation

Airlines - In 1969, two international airlines, viz - Trans World Airlines and Swissair commenced operation through Ceylon while a few other major airlines such as Lufthansa have negotiated with the Government for landing rights. The number of weekly international flights through Ceylon's International Airport now used by seven international airlines increased from 18 in 1968 to 24 in 1969. The national airline, Air Ceylon Ltd., commenced the operation of regional flights from Colombo to Karachi, Bombay and Madras on the neighbouring sub-continent and in the Far East to Bangkok, Kuala Lumpur and Singapore. These services along with those offered by Indian Airlines Inc., who operate regional flights from Madras to Colombo now bring the total number of flights to Colombo to 48 per week. The national airline also operates regular domestic flights to the North and East while aircraft could be chartered for groups visiting the historic ancient cities region from Anuradhapura. A private airline service provides aircraft on charter to other places of interest. This service, is however,

at present limited to the North, East and South of Ceylon as facilities for landing aircraft are not available as yet in other areas such as the hill country.

The two National Parks, namely, the one in Yala off the South Coast and the other in Wilpattu on the North Central region serve as a lure to both the wild life enthusiast and the photographer. The Wild Life Department administers these parks where comfortable accommodation is provided for visitors staying overnight. In addition, there are the rich Bird Sanctuaries of Kumana and Weerawila in the South while Manampitiya and Lahugala are more the reserve of big herds of wild elephant. The animal population here includes the elephant, bear, leopard, sambhur, deer pig and buffalo. The rolling hills of the Horton Plains Tableland, close to Nuwara Eliya, and over 7,000 ft. in elevation contains interesting varieties of flora, fauna and bird life. This area which is also one of Ceylon's best fishing grounds has been declared a Nature Reserve.

Accommodation - Approved accommodation for tourists is made up to 23 hotels, 35 guesthouses and 32 resthouses with a total of 1,483 rooms with the bed-strength of 2,662.

The Board has also approved accommodation in private homes in Colombo, Kandy and Galle which is available as paying guest accommodation.*

The railway provides special transport facilities for tourists while special vehicles for road transport are also available. The present fleet of vehicles in the travel trade which is made up of 75 cars, 38 station wagons (20 airconditioned), 8 Micro-buses (13-15 passengers), 10 buses of which 3 are airconditioned (18-28 passengers), and 8 buses of which 3 are airconditioned (32-43 passengers) will be further strengthened before the 1970/71 tourist season by the importation of another 110 cars and 15 luxury coaches. Also, about 500 new taxis have been imported and are in use.

4. Government Participation

(i) Ownership or shares in hotels:

The Ceylon Hotels Corporation, another Statutory Body has been established for the chief purpose of providing and operating efficient and attractive tourist services, living accommodation, transportation, entertainment and recreation. Government holds a minimum of 20% of the issued capital of the Corporation. The Corporation is presently in charge of 13 of the small accommodation units - Resthouses - on the island. A major project of the Corporation is the construction of a 250-roomed hotel in collaboration with the Intercontinental Hotels Corporation of the United States of America.

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

A loan fund for hotel construction has been established.

* A scheme of person-to-person hospitality for interested visitors belonging to different professions to meet their Ceylonese counterparts in their home environment has also been instituted.

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

Substantial tax concessions for investment in new hotel undertakings and renovations to existing hotels, in operation of new hotels and employment of foreign personnel in management has been approved by Government and the new legislation has been passed by Ceylon's Parliament. The tax concessions include a 5-year tax holiday thereafter 15 years at half the usual rate, lump sum depreciation, development rebates, investment relief to tax exemption of emoluments of foreign personnel employed in hotels. These concessions are subject to approval by the Minister of Finance on the recommendations of the Ceylon Tourist Board.

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

Customs duty concessions for essential items to be imported from abroad for the construction and equipping of hotels has been approved by Government. The items have been classified into 3 categories - a no-duty category, 5% preferential and 15% general duty category, and a 25% preferential and 35% general duty category. A variety of items have been included in this revenue order ranging from essential material for construction to equipping.

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

The allocation of foreign exchange is under control by the Government which has made special allocations to the Ceylon Tourist Board for its promotional activities as well as to the local travel trade for promotion and advertising abroad. A sum of approximately Rs 2,765,000 was provided by the Government as the budget for publicity and promotion for the fiscal year.

- (vi) Government expenditure on infra-structure:

Special foreign exchange allocations have been made for the maintenance and improvements of existing hotels and for the import of material and equipment for new hotel constructions. Foreign exchange has also been allocated for the import of motor vehicles for tourist transport. Public buildings and public utilities in the resort centres to be developed will be provided by the Board, while hotel construction and operation, the management of commercial and shopping centres, restaurants and entertainment are the responsibility of the private sector.

5. Action Taken During the Current Year

Income tax and other concessions on hotel and other tourist income:

The last date prescribed for some of the tax concessions of April 1, 1969, was extended by law to April 1, 1970.

Customs duty concessions on essential items for new hotel construction and equipping as well as renovation of existing plant were further reviewed and a wider range of items included as an incentive to the Industry.

New Hotel Projects:

Consequent to the positive policy adopted by Government for the attraction of investment to the industry, by way of fiscal concessions, an impact has been made on the expansion of plant. The position in summary is as follows:-

| | | 1969-Visitor Projection 44,300 | | | 1970-56,000 Visitors | | | 1973-129,000 Visitors | | |
|--|---------------|--------------------------------------|----------------------------------|---------------|-------------------------|----------------------------------|---------------|--------------------------|--|--|
| Region | Exis- ting | New Comple- ted | Addl. rooms projec- ted | No. Appvd. | Diff- erence | Addl. rooms projec- ted | No. Appvd. | Diffe- rence | | |
| Colombo Resort Region | 350 | 91 | 269 | 326 | + 57 | 393 | 635 | + 242 | | |
| South Coast Region | 85 | 18 | - | 146 | + 164 | 286 | 69 | - 217 | | |
| Ancient City Region | 130 | 60 | 30 | 52 | + 22 | 228 | 100 | - 128 | | |
| Hill Country Region | 50 | - | - | - | - | 75 | - | - 75 | | |
| East Coast & Other Regions | 35 | - | - | - | - | 75 | - | - 75 | | |
| | | 650 | 169 | 299 | 524 | - | 1,057 | 804 | | |

One of the hotels programmed for completion by October 1970, is the Pegasus Reef Hotel, in collaboration with BOAC and Fortes. The hotel of 5-star category will contain 142 rooms and 5 suites. This is sited on the West Coast about 10 miles north of the capital city of Colombo. Two other city hotels of the 5-star category have progressed beyond the planning stage and are due to commence construction shortly. They are the 250-roomed Intercontinental Hotel and the 262-roomed Hotel Ceylon Oberoi. Another proposal for a 300-roomed hotel in collaboration with Holiday Inns of America is under negotiation.

Holiday Resorts:

In terms of Part II of the Tourist Development Act, 1968, steps have been taken to declare an area in Bentota a National Holiday Resort. Land for this purpose had previously been acquired by the Board. In furtherance of the Board's objects, and with the approval of the Hon. Minister in charge of Tourism a number of defined allotments of land within the resort area for hotel projects have been demarcated and leased. The National Holiday Resort at Bentota on the West Coast, and 38 miles from Colombo City - the principal point of entry, is nearing completion. This resort of 100 acres of land will be a self-contained complex with all amenities for overseas and local visitors, including hotels, a commercial and shopping centre, restaurant, exhibition centre for local crafts and public buildings.

The resort is due to commence operation in early 1970. In the first stage, 2 hotels with a total of 100 rooms will be available as accommodation. Another hotel of 23 rooms will be ready by the middle of 1970. The total accommodation strength including the second stage would be around 400 to 500 rooms. This would be essentially a beach resort, with access to the ancient fort of Galle, wild life and other places of visitor interest. The preparatory ground work necessary for establishing similar resorts in other parts of the country, such as Sigiriya, Giritale, Polonnaruwa and Trincomalee, is under way. The provisions of the above Act have already been involved for the purpose of vesting in the Board the extents of land required by it.

In the process of establishment and phased for completion over the period 1970 through 1973 are the four resorts of which mention has been made earlier and another on the South Coast in the vicinity of the national park. These resorts will provide around 250 rooms in the interior and the coast.

Tourist Development Fund:

A fund has been established for the grant of loans for new units and renovations of existing units on the coast and the ancient cities, in line with the Board's priorities for development. Loans will be available for small and medium-sized projects at a very reasonable interest rate of 5½% per annum with a maximum repayment period of 20 years.

Protection of Highways, Places of Scenic Beauty, and Control of Junk Yards:

In terms of Part III of the Tourist Development Act, a set of regulations called the Protection of Highways and Places of Scenic Beauty and the Control of Junkyards Code for promoting the safety and recreational value of public travel, and for the preservation of natural and scenic beauty, became law. Power was taken under these regulations for the Minister to declare particular areas of scenic beauty bordering highways which were being marred by the erection of hoardings, advertisements and unsightly structures and the denudation of valuable trees and foliage to be declared "protected highways".

Codes of regulations for the supervision and control of business engaged in the tourist industry, such as hotels, travel agents, transporters, guides, have been in the course of preparation. After careful consideration and in consultation with the operators concerned, the regulations relating to hotels and travel agencies have been finalised and are ready to be brought into force.

Certain resthouses noted for the scenic splendour of their environs have been vested in the Board during the period under review, in terms of the provisions of this Act. The majority of these resthouses have been leased to the Ceylon Hotels Corporation and a few to the private sector in order to ensure their smooth and efficient operation.

Sport Fishing Facilities:

A Report on the Propagation and Development of Fresh Water Fish of Sporting Type in Ceylon was made by Mr. G. M. Malik, Director of Fisheries, Jammu & Kashmir Government, India. This Report is under study.

6. Future Plans for the Tourist Industry

Apart from the Programme of Resort Development already under way, 3 areas have been selected for the establishment of resorts on a larger scale. These areas are now subject to a pre-investment study relating to planning and layout, estimate of capital requirements for public utilities, accommodation and other recreational amenities, as well as a forecast of profitability on the investment involved. This study would also include a phased programme in relation to the traffic expected and its pattern through the years 1973-1976.

Of the areas selected for the study one is around 1,300 acres off Trincomalee on the East Coast, another of 1,000 acres on the Southern Coast, and the third of 30 acres on the West Coast - about 8 miles north of Colombo.

The study would assist the private sector - whether foreign or local - in evaluating the viability of participation in hotel development in these areas. The report on the areas will be available by August, 1970.

In terms of the projects approved for completion over the period 1970-1972, there would be 1,497 new rooms in the country. The total requirements projected for completion by 1973 is 2,400 rooms for a projected traffic of 129,000. Considering the existing plant and the new rooms to be completed there would be a shortfall of 400 rooms, particularly in the coastal areas, and the ancient cities region.

Cyprus

The Island's potential as a tourist country depends largely on its Mediterranean climate; its variety of landscape and scenery; 700 kilometres of beaches, and on its places of historical and religious interest, i.e. its archaeological sites and ancient monuments from Neolithic (6000 B.C.) to Bronze Age sculpture; Greek and Roman theatres and temples, Byzantine painted churches and medieval gothic cathedrals, palaces and castles.

1. Value and Extent of the Tourist Industry

| | | |
|-----------------------------|--------|---------|
| Number of tourist arrivals, | 1966 : | 54,114 |
| | 1967 : | 68,397 |
| | 1968 : | 88,471 |
| | 1969 : | 118,006 |

Mainly from United Kingdom, United States, Greece and the Middle East.

Also from Europe e.g. Scandinavia, Germany and France.

| | | |
|--|--------|--------------|
| Foreign exchange receipts from tourism, | 1966 : | £3.6 million |
| | 1967 : | £4.3 " |
| | 1968 : | £5.8 " |
| | 1969 : | £7.8 " |

| | |
|---|-------------|
| As a percentage of total foreign exchange earnings, | |
| | 1966 : 6.1% |
| | 1967 : 6.7% |
| | 1968 : 7.6% |
| | 1969 : 9.1% |

2. Official Promotional Organisation

The newly established Cyprus Tourist Organisation (KOT) a semi-official organisation under the auspices of the Ministry of Commerce and Industry will take over overall responsibility for tourist development and promotion for the whole Island.

The Cyprus Tourist Organisation (KOT) will administer tourist matters in co-operation with the following Government quasi-official and private bodies and organisations:

- (a) Ministry of Commerce and Industry
- (b) Central Tourist Advisory Board
- (c) Festivals Committee
- (d) Hotel Keepers' Association
- (e) Travel Agents' Association
- (f) Planning Commission (Central)

- (g) District Tourist Advisory Committees
- (h) Other Government Ministries and Departments.

The functions of the Organisation will include.

Promotion and publicity through advertising abroad; co-ordination of all tourist promotional and developmental activities, official as well as private; stimulation of all national activities, likely programmes and policies; improvement of the industry; development of tourism programmes and policies; improvement and extension of tourist attractions and facilities; promotion of tourism consciousness amongst Cypriots; encouragement of domestic, social and youth tourism; support for the preservation of historical and cultural sites; application of regulations governing the various sectors of tourism; and representation and participation in the work of international or regional organisations. The Organisation will be responsible for the establishment of offices or representatives abroad for the distribution of publicity material.

The Cyprus Tourist Organisation will also represent Cyprus at international tourist conferences in the sole capacity as the national travel organisation of Cyprus.

The Cyprus Tourist Organisation will be responsible for the regulation, licensing classifications, fixing of standards, price control and regular inspection of hotels throughout the country.

It will be also responsible for the establishment, running and financing of regional tourist offices and the supervision, control and co-ordination of the tourist association and clubs.

It will keep close liaison and co-operation with airlines and travel agents, both local and overseas.

It will be responsible for arranging courses for the training of guides and staff at information and reception offices.

3. Internal and Infra-structural Organisation

Cyprus has 134 officially licensed and classified hotels containing 4,250 rooms and 7,750 beds. The Cyprus Tourist Organisation will be responsible for the regulation, licensing classification, fixing of standards, price control and inspection of hotels throughout the country. It will be the initiating and coordinating body for the development of infrastructural public utilities in connection with tourism development in new tourist zones where such utilities do not exist.

It will also be co-operating closely with the competent Ministry concerned with the planning and construction of tourist roads, harbours, ports, marinas and embellishment projects.

The Cyprus Tourism Organisation will also be responsible for the establishment running and financing of regional tourist offices and the supervision and coordination of the tourist associations and clubs.

The Tourism Organisation will also in close cooperation with the District Officers and the Improvement Boards for the development of

tourism in several resorts, mainly mountain resorts.

4. Government Participation

(i) Ownership or shares in hotels:

Hotels are normally privately owned. Government, however, has to a large extent financed the Cyprus Hilton Hotel which cost circa £1,350,000, and is now developing a tourist complex in Famagusta providing of 1,200 beds and other recreational amenities.

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

The Government has made available some £1,200,000 in the form of long term loans at low interest for the modernisation of existing hotels and tourist centres in places of entertainment and the erection of new ones.

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

The Government grants land for hotel construction of tourist development at concessional rates.

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

Government has exempted from custom duty a number of articles required for the equipment of hotels.

(v) Provision of public funds for publicity purposes:

The actual allocation of funds for tourist publicity varies from year to year and ranges from £90,000 to £110,000 per annum. This money is generally spent on the production and distribution of tourist publicity media, press advertisements and public relations overseas as well as establishment of overseas offices.

The Government had made funds available for tourist publicity and advertising on an international scale, thus great quantities of tourist leaflets, folders, posters, window displays and dispensers have been produced, also tourist films - and distributed with care.

The government has participated in many international shows projecting the Island's tourist attractions.

It has founded a Trade and Tourist Centre in London and a Tourist Centre in Frankfurt a. Main and has for the last 8 years employed the services of public relations consultants in London in order to make the Island's tourist attractions better known in the United Kingdom and Europe. As from January this year the Ministry of Commerce and Industry has also engaged a public relations agency in the Federal Republic of Germany.

It has carried out a world wide hospitality and educational programme for more than 1,500 overseas travel agents and writers during the last 17 years.

It has encouraged and assisted financially all Cyprus towns and resorts in the organisation of festivals, exhibitions and special events.

(vi) Government expenditure on infrastructure and embellishment:

More than seven million pounds have been spent from 1961 - 1966 for the improvement of roads and the construction of new ones, for the improvement and building of new ports, e.g. Kyrenia Yacht Club and Famagusta Harbour.

The Government has restored ancient monuments and improved museums.

It has founded a Central Hotel Training School in Nicosia for the training of personnel in the lower grades and has awarded more than 120 scholarships to Cypriots who have shown aptitude for higher education in hotel and tourist schools overseas. As from 1st January 1969, Government has founded in Nicosia in co-operation with the ILO a Hotel and Catering Institute.

The Government's measures and activities for the promotion and development of tourism can be summarised as follows:

(a) Facilitation:

- (i) The entry of visitors to Cyprus at points of entry has been simplified by the abolition of formalities.
- (ii) The Carnet de Passage en douane has been abolished by law.
- (iii) Reception and information has been further enhanced by the establishment of Tourist Information Bureaux at nearly all the towns in Cyprus. Also conditions have been considerably improved by the operation of the Nicosia Airport New Terminal Buildings (since March 1968).

(b) Development:

- (i) Roads, harbours and airport have been considerably improved. Famagusta Harbour has been extended considerably and Nicosia Airport has acquired a modern complex of terminal buildings.
- (ii) The erection of new hotels and the modernisation and extension of existing ones, have been

encouraged by long-term Government loans at low interest amounting to approx. £1,200,000.

- (iii) Government has also encouraged through long-term loans the erection of good modern restaurants and places of entertainment.
- (iv) It has also financed several embellishment schemes.
- (v) It has erected tourist pavilions at major archaeological sites which add to the attractions and tourist facilities.
- (vi) It has helped in the establishment of Youth Hostels by making available suitable Government buildings.
- (vii) It has financed feasibility studies on tourist development.
- (viii) It has taken measures for the preservation of historic monuments and for the protection of landscape and nature.

(c) Promotion and Publicity:

The government carried out in co-operation with Cyprus Airways, BEA and Olympic Airlines, an extensive and effective advertising and publicity campaign in the United Kingdom.

It has established a Cyprus Trade and Tourist Centre in London and a Tourist Centre in Frankfurt a main and participated in many fairs and exhibitions in the United Kingdom and Europe.

It has financed a number of events organised in Cyprus for the entertainment and recreation of visitors.

It has produced tourist publicity material and media including posters, films, leaflets, display units and has built up a photographic library of both colour slides and black and white photographs.

5. Action Taken During the Current Year

Not available at time of publication.

6. Future Plans for the Tourist Industry

Government has called experts who drew up technical studies, e.g. Study of Cyprus Tourist Development by SCET Co-operation; Study of the Medical Springs of Cyprus by Dr. Ott; Hotel Training in Cyprus by

Prof. John Fuller, Director, the Scottish Hotel School, Glasgow (UK Department of Technical Co-operation). The above studies are in fact being progressively implemented.

The Cyprus Government has engaged consultants for the preparation of detailed studies for the development of three new beach tourist zones in Famagusta and Kyrenia and of a mountain area on Troodos. Future plans include the construction and development of new roads, marinas, and fishing villages by government and of a number of new hotels by private enterprises.

Prospects - the total capacity of hotel accommodation is now circa 8,000 beds in official classified hotels, i.e. Cyprus is capable of receiving at least some 150,000 visitors per annum and prospects are excellent. Given political stability the Island might expect to receive a tourist traffic of 300,000 within the next three years with earnings totalling £20 million.

The Gambia

The Gambia has established its claim as a country with attractive possibilities for a winter holiday. The climate from November through to May has been described as one of the best in the world. A long unspoilt coastline; a river which takes visitors deep into the hinterland; fishing; its exotic birdlife and the colourful dress and customs of its people are some of the attractions.

1. Value and Extent of the Tourist Industry

In the 1968/69 season some 900 tourists, mostly from Scandinavia, spent two-week holidays in The Gambia. An independent survey team from Britain estimated that each tourist spent between £30/40 during their stay. In addition, a cruise ship programme with two ships making weekly calls from the Canary Islands started in December, 1968. About 2,000 passengers spent one-day excursions in The Gambia during the 12 weeks long season. It is estimated that on average each passenger spent £2 each.

2. Official Promotional Organisation

The Tourist Board, comprising representatives from both the private and official sectors, is the principal promotional and advisory body. It is non-statutory but empowers The Gambia Information Services to produce publicity material for tourist promotion and consumption.

3. Internal and Infra-Structural Organisation

Hoteliers representing the existing three hotel groups are represented on the Tourist Board. Shipping agents, airlines, local transport and the voluntary Tourist Association are also represented.

There are four hotels providing some 250 beds, all in the Bathurst and district areas, all suitable for international visitors. Three regular airlines, BUA, Nigeria and Ghana Airways and Air Senegal run scheduled services to Yundum Airport. In addition a Swedish charter flight makes fortnightly trips from November to April.

A nature park, with specimens of game, has been established close to Bathurst.

4. Government Participation

(i) Ownership or shares in hotel:

Existing hotels are all privately operated.

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

None.

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

None.

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

Certain items of hotel equipment are exempted from customs duty. Certain building materials for genuine hotel development have been similarly exempted.

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

£500 was provided for publicity material and general public relations last year.

- (vi) Government expenditure on infra-structure:

In its general development programme Government has improved airport and seaport facilities, road and ferry services, nature park development and an information kiosk was built.

5. Action Taken During the Current Year

- (a) facilitating cruise ship programmes;
- (b) enlarging existing ferry services;
- (c) renovating ancient monuments and ruins;
- (d) initiating Gambia-Swedish friendship society (a direct result of tourism);
- (e) establishing a Gambia Craftsmen Market and this has stimulated a local fabric and dyeing industry;
- (f) issuing a special set of tourism postage stamps;
- (g) extensions built to existing hotels;
- (h) agreement made with Swedish boat-owner to operate a fishing and excursion service.

6. Future Plans for the Industry

A general increase in tourist traffic is confidently expected - in particular from northern Europe. Over 1,200 visitors are predicted for 1969-70. Two new hotels are planned by Swedish-based interests and will be opened sometime in 1971-72.

Major rebuilding of both the airport and seaport facilities will start in 1970.

Ghana

The tourist potential of Ghana depends largely on its warm weather, places of scenic beauty, beaches (there are 334 miles of coast-line) surfing at Takoradi, Tema, Winneba and Busua, its historic castles and forts, forests, game reserves, lakes and the colourful dress and customs and festivals of the people.

1. Value and Extent of the Tourist Industry

| | |
|-----------------------------|---------------|
| Number of tourist arrivals, | 1966 : 24,906 |
| | 1967 : 29,946 |
| | 1968 : 15,315 |
| | 1969 : 30,918 |

Mainly from United Kingdom, United States, Germany and France.

| | |
|---|-------------------------------------|
| Foreign exchange receipts from tourism, | 1966 : 206,000 |
| | 1967 : 308,000 |
| | 1968 : 1,014,000 |
| | 1969 : 507,000 (January to June) |

From the time of Independence in 1957 to about 1963, the tourist industry contributed, on the average, about two million new cedis (N¢ 2,000,000) a year to Ghana's foreign exchange resources. Total tourist receipts, however, began to decline from N¢ 2,592,000 in 1963 to N¢ 126,000 in 1964. Since 1964 tourist receipts, in terms of bank transactions, have recovered somewhat, amounting to N¢ 1,014,000 in 1968.

A significant point about the volume of tourist traffic, is that while there has been a steady increase in the total number of tourists visiting Ghana between 1964 and 1968, this increase is not reflected in the tourist receipts in terms of bank transactions for the corresponding period.

| | |
|---|----------------------------|
| As a percentage of total foreign exchange earnings, | 1967 : 0.1% |
| | 1968 : 0.27% (provisional) |
| | 1969 : not available |

2. Official Promotional Organisation

The National Tourist Corporation of Ghana was set up in October 1968 (National Liberation Council Decree No. 310) to determine policy relating to the development and promotion of tourism and to serve as the central co-ordinating and advisory body in all matters relating to tourism.

The Corporation is governed by a 15-member Board of Directors drawn from the Ministries of Finance, Trade, Information, Economic Affairs, Communications, External Affairs, Cultural Affairs, Works and Housing. Other members are drawn from the State Hotels Corporation, Ghana Airways Corporation, Department of Game and Wildlife, Volta River Authority and two other distinguished Ghanaians in the field of art and literature. Late in

1969, the National Tourist Corporation was put under the direct supervision of a Minister of State - Ministry of Trade, Industry and Tourism.

The Corporation is empowered to discharge the following functions -

- (a) The promotion, development and enhancement of places of historic and scenic interest in Ghana;
- (b) the encouragement and inducement of holiday makers, travellers and tourists to travel to and see such places;
- (c) the promotion and advertisement of tourism in Ghana and abroad;
- (d) the promotion and advertisement of tourist organisation;
- (e) the promotion of tourism consciousness throughout the country;
- (f) carrying out study and research on tourism; and
- (g) the carrying out of such functions relating to tourism as it may think fit and is in the national interest.

3. Internal and Infrastructural Organisation

Other organisations connected with tourism include the State Hotels Corporation, the Ghana Association of Travel Agents, and the Board of Airline Representatives.

The State Hotels Corporation operates eleven hotels and resthouses located in the major cities and towns, and there are also a number of privately owned hotels of a standard suitable for international travellers. In the minor towns there exists a large number of small non-catering resthouses patronised mainly by travellers using their own cars.

There are 16 travel and tourist agencies in Ghana, 8 of which possess IATA licences. The IATA licenced travel agents form an Association which is a member of the Universal Federation of Travel Agents' Associations (UFTAA).

Ghana has one international airport (Accra) and three airports for internal use (Takoradi, Kumasi, Tamale). Scheduled services between Accra and the major cities of Western Europe, Africa and the Middle East are operated by 14 international airlines, namely: Ghana Airways, Pan American, BOAC, Alitalia, Lufthansa, Swissair, BUA, KLM, Nigerian Airways, Ethiopian Airlines, Middle East Airlines, Air Afrique, Air Mali and United Arab Airlines.

The main shipping lines operating through the country's two ports at Tema and Takoradi are the Black Star Line, Liner Agencies, Farrel Lines, Umarco, Scanship, and Woermann Line. The two ports, though principally commercial, have good facilities for the reception of visitors.

Ghana's network of major roads (those under the care of the Public

Works Department (PWD)), stretches over 6,000 miles, 2,500 of which are tarred. These roads link up the main tourist regions of the country and other neighbouring African countries.

4. Government Participation

(i) Ownership or shares in hotels:

Government owns seven hotels, namely, Ambassador, Continental, City, Atlantic, Meridian, Star, Airport, the Winneba Beach Club and four Catering Resthouses, namely, Kumasi, Tamale, Cape Coast and Sunyani.

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

Consortium loan from National Investment Bank and the Commercial Banks for rehabilitation of Ambassador and Continental Hotels is being negotiated.

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

No concessions are granted.

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

None.

(v) Provision of public funds for publicity purposes:

Not available at time of publication.

(vi) Government expenditure on infrastructure:

Not available at time of publication.

5. Action Taken During the Current Year

When 1969 was proclaimed as the International Year of African Tourism, Ghana played her part for the full realisation of the objectives. Ghana recognised this important stepping-stone in the development of tourism in Africa by devoting two weeks of May to an Exhibition on Tourism in the Capital, Accra, at which all the leading practitioners of tourism in Ghana combined to demonstrate the facilities that exist in the country for holidays and tourism.

Ghana undertook to publish a 112 page brochure on tourism in commemoration of the International Year of African Tourism. The brochure which was released, in July 1969 gives such detailed information on Ghana as:

(a) How to get to Ghana by air, land and sea;

(b) Climatic conditions;

(c) Facilities: Hotels, restaurants, health etc.;

- (d) Cultural Activities: A calendar of holidays, information on traditional dancing, music and festivals etc;
- (e) Currency: the unit of Ghana monetary value compared with the US dollar, Sterling and the German Mark;
- (f) Customs regulations: documents required by foreign citizens and how to get them;
- (g) Common courtesies and local customs: What is expected of a tourist, how to dress etc.;
- (h) Where to go: sight-seeing notes on cities and places of interest;
- (i) Sources of further information: where to go for any information required.

Ghana issued other tourist literature on the occasion of the celebration of International Year of African Tourism. These include:-

- (a) "How to see Accra" - a seven page folder;
- (b) "A Guide Map of Accra"; and
- (c) IYAT commemorative envelope.

Kotoka International Airport - Steps have been taken to provide first class facilities at the new international airport for visitors. They include duty free shop, craft shop and a tourist information desk.

6. Future Plans for the Tourist Industry

Steps are being taken to engage the services of a competent and reputable firm of consultants to conduct a feasibility study of the whole country as a pre-requisite for enunciating a national tourism development policy. In such a survey, experts will be able to list out all the tourist potentials for both local and foreign consumption. They will propose those to be developed and promoted and in what way and how best in order of priority.

Promotional Activities:

The Corporation has undertaken to publish 3 different brochures on tourism. The first brochure entitled, "Official Guide Book of Ghana" came out in July, 1969.

The second brochure which will follow shortly gives detailed information on tourist attractions and events. This will cover beaches, water falls, scarps, forts and castles, lakes, zoos and gardens rest-houses and catering facilities etc.

The third brochure will feature important towns and cities like Accra and Tema, Kumasi and Takoradi etc.

Tourist Centres:

These are to be established both within and outside Ghana. All the diplomatic missions abroad, especially, in USA., Canada, Great Britain and West Germany will be supplied with brochures for distribution. In addition, a colour film high-lighting Ghana's cultural heritage will be produced and distributed to television stations in North America, Britain and Europe on an exchange basis and to the diplomatic missions for showing to foreigners with a view to attracting tourist visits.

Tourist Season and Events:

The winter months i.e. December to February will be declared tourist season to attract visitors from America and Europe. During the tourist season, special flights at reduced fares will be arranged from such capitals as London, Bonn, New York to Accra. Special traditional events and festivals will be arranged towards the entertainment of tourists during the season, e.g. the Regatta at the Accra Wharf and a special dramatized durbar at the Elmina Castle to recall the first contact between the Portuguese and Ghanaian chiefs at Elmina.

Cultural Projection:

Efforts will be made to expose Ghanaian culture in USA, Britain and West Germany with the view to attracting visitors to Ghana.

Rest Houses and Catering Facilities:

These will be provided at every spot of tourist attraction e.g. beaches, water falls and botanical gardens etc. Private business companies will be encouraged to build motels etc. Whilst Government will provide all necessary infrastructural facilities such as roads, electricity, water, etc., to tourist spots.

Guyana

Guyana's tourist potential lies in the fact that it is accessible to other countries in South and North America, has an equable climate with sub-tropical temperatures; its beaches and scenic interior, including the Kaieteur Falls.

1. Value and Extent of the Tourist Industry

| | |
|-----------------------------|--|
| Number of tourist arrivals, | 1966: 18,349 (plus 24,241 intransit passengers) |
| | 1967: 15,960 (plus 16,181 intransit passengers) |
| | 1968: 18,000 (plus 25,000 intransit passengers) |
| | 1969: 20,000 (plus 25,000 intransit passengers) |

Mainly from the United Kingdom, United States, West Indies and Canada.

| | |
|--|--------------------------|
| Foreign exchange receipts from tourism, | 1967: W.I. \$2.0 million |
| | 1968: W.I. \$2.5 million |
| | 1969: W.I. \$3.0 million |

| | |
|--|---------------------|
| As a percentage of total foreign exchange earnings, | 1966: 1.2% |
| | 1967: not available |
| | 1968: not available |

2. Official Promotion Organisation

The official promotional tourism organisation is the Guyana Development Corporation. The Tourist Development Committee (under the jurisdiction of the Ministry of Trade), and the Guyana Development Corporation (under the Ministry of Economic Development) represent both the Government and the private sector of the industry.

Government's Tourism Policy:

- (a) To foster, promote and develop the tourist industry as an instrument for the economic advancement of the people of Guyana;
- (b) to encourage Guyanese and foreigners to know Guyana and appreciate its resources by spending their holidays at places of interest within Guyana;
- (c) to survey, identify and develop historical sites, monuments and objects, and to recognise their importance and value as tourist attractions;

- (d) to foster and promote such appropriate cultural and national activities as may attract tourists to the country;
- (e) to encourage those industries, services and agricultural pursuits which can contribute to the development of tourism;
- (f) to train the people in the skills required for the development of tourism;
- (g) to encourage the private sector by appropriate fiscal and other means, so that it may make the maximum contribution to the development of the industry; and
- (h) to participate in regional and inter-national programmes for the promotion of the tourist industry.

3. Internal and Infra-structural Organisation

Guyana Airways Corporation and a number of private tours agencies operate organised tours to tourist sites in the interior, and to many parts of the country.

4. Government Participation

- (i) Ownership or shares in hotels:
All hotels are privately owned. However, a 100-room hotel estimated to cost \$5 million is under construction at Eveleary, Georgetown and the Government is to have a 5% equity of the hotel company when it is incorporated. Government will also have the right to nominate one member of the Board of Directors.
- (ii) Financial assistance specifically available (e.g. loans and guarantees):
Not available at time of publication.
- (iii) Income tax and other concessions on hotel income:
The Hotel Development Law, part of the Industrial Development Law, allows certain tax concessions on hotel income.
- (iv) Import duty concessions on material and equipment for hotel or other tourist construction:
The same law grants duty concessions on necessary articles for construction of hotels.
- (v) Provision of public funds for publicity purposes:
Not available at time of publication.

(vi) Government expenditure on infra-structure :

A budget of \$1.1 million has been allocated to tourist industry development during Guyana's 7-year plan period.

5. Action Taken During the Current Year

A five million dollar (\$5m.) Tourist Hotel was established in Georgetown at the end of 1969. The International-Class Hotel - Pegasus - has over 100 rooms. Many hotels and guest houses throughout the country are engaged in a programme of expansion.

A holiday camp site was established in the Timehri area, some 25 miles from Georgetown. This has proved to be popular for weekend picnics.

An airstrip, to accommodate light aircraft, was laid down on the Kaieteur Top, and Guyana Airways Corporation operated one-day weekly excursions into the area. A blue-print for the development of Kaieteur Top is now on the drawing board.

6. Future Plans for the Industry

The Guyana Development Programme 1966/72 states that the Government intends building a tourist lodge at Kaieteur Falls (of 20 bedrooms). An air-strip, estimated the cost of \$400,000, is under construction in the same area to make it more accessible.

For clearing and beautification of recreational areas and tourist sites, a sum of \$500,000 has been allocated.

For improvement to hotel accommodation, up-grading existing facilities, classification, inspection and regulation, \$150,000 has been allocated over the next seven years.

Total cost for the over-all plan is estimated at \$1,100,000.

India

India's tourist potential consists in her cultural and historic monuments, variety of climate and landscape, warm and friendly people with a heritage of festivals, music and dance as alive today as centuries ago, beautiful natural scenery from the mountains to the beaches and the interesting spectacle of a nation striving to attain a harmonious blend of ancient glory and modern achievements.

1. Value and Extent of the Tourist Industry

| | | |
|--|--------|-----------------|
| Number of tourist arrivals, | 1966 : | 159,603 |
| | 1967 : | 179,565 |
| | 1968 : | 188,820 |
| | 1969 : | 244,724 |
| Foreign exchange receipts from tourism, | 1964 : | Rs. 230,000,000 |
| | 1965 : | Rs. 215,900,000 |
| | 1966 : | Rs. 226,100,000 |
| | 1967 : | Rs. 252,300,000 |
| | 1968 : | Rs. 265,400,000 |
| | 1969 : | Rs. 331,100,000 |

As a percentage of total foreign exchange earnings,

| | |
|--------|----------------|
| 1966 : | 1.0% |
| 1967 : | 2.0% |
| 1968 : | 2.0% |
| 1969 : | not available. |

2. Official Promotional Organisation

A Department of Tourism within the Ministry of Tourism and Civil Aviation in the Central Government under a Cabinet Minister. A Cabinet Committee on Tourism gives decisions on matters of the highest importance. A Committee of Permanent Secretaries of the Ministries of Foreign Trade, Transport and Shipping, Railways, Finance, Defence, Education and Youth Services and Tourism and Civil Aviation under the Chairmanship of the Cabinet Secretary has also been set up.

The Tourist Development Council is an Advisory Body at the national level. It is presided over by the Cabinet Minister of Tourism and Civil Aviation. Its members are officers of the Central Government connected with tourism problems, Ministers dealing with Tourism in the State Governments, nine Members of Parliament, representatives of hotel and travel industry and persons distinguished in public life. The Council meets once a year.

The Department of Tourism is headed by a Director General. The present incumbent is of the rank of Additional Secretary. He is assisted by a Joint Director General and three Deputy Directors General who oversee Administration, Planning, Research, Training, Publicity and Travel Trade

Sections of the Department.

Besides the headquarters, there are fourteen offices abroad (London, Paris, Frankfurt, Geneva, Brussels, Stockholm and Milan in Europe; New York, Mexico, San Francisco, Chicago and Toronto in America; Sydney in Australia and Tokyo in Japan) and ten offices within the country at key centres viz. Delhi, Bombay, Calcutta, Madras, Agra, Varanasi (Banaras), Jaipur, Aurangabad, Cochin and Jammu.

India is a member of the International Union of Official Travel Organisations, and the South Asia Travel Commission. She is also a member of the Pacific Area Travel Association.

3. Internal and Infrastructural Organisation

Air: Both Air India (External) and the Indian Airlines (Internal) are autonomous corporations set up in the public sector under the Ministry of Tourism and Civil Aviation.

Railways: the largest system in Asia, are run by the Ministry of Railways; **Classes:** Airconditioned, First, Second and Third.

Road: About 45 National Highways with a length of about 15,000 miles connect the important cities in the four corners of India. These roads are metalled throughout spanning small and large rivers. About 170 major bridges have been constructed in the last twenty years alone. Two other categories of roads viz. State Highways and District roads provide links to towns and villages in remote areas. The Federation of Automobile Associations of India has its headquarters in Bombay.

Buses: coaches and taxis with meters and without are widely available. In view of the Indian Government's ban on the import of luxury cars, the approved tourist taxi operators are given special priority in the allocation of secondhand luxury cars, under arrangements with the State Trading Corporation. A scheme to provide financial aid to car operators for purchase of cars etc., to be run as tourist vehicles has been finalised and will be introduced shortly.

Inland Waterways: Rivers, lakes and backwaters of Kerala are served well with motor launches for sightseers.

Travel Agencies and Shikar Outfitters:- the Travel Agents Association of India and the Shikar Outfitters Association maintain close links with the Tourist Department and accept its regulatory conditions in lieu of official recognition of its members who individually belong to international organisations such as ASTA, PATA, WATA etc.

Guides and Excursion Agents: trained and approved by the Tourist Department, English speaking - and in some cases French and German speaking - can be engaged at key tourist centres. There are also Excursion Agents who confine their activities to providing sightseeing facilities.

Hotels and Restaurants: there are at present 166 approved hotels in India, with a room capacity of 8807, which have been classified according to the internationally accepted star system in categories ranging from 5 star for luxury hotels down to 1 star which offer only essential facilities. In addition, a number of hotels which were approved at the planning stage but

are awaiting classification, offer a total of 585 additional rooms. The number of approved restaurants is 56.

4. Government Participation

(i) Ownership or shares in hotels:

While the hotel industry falls basically in the private sector, Government has undertaken construction and management of hotels to fill the gap and to accelerate the pace of development. This is being done through the India Tourism Development Corporation with an authorised capital of Rupees 100 million. By 1971, the Corporation hopes to be able to utilise about 21 million rupees on the construction/renovation of hotels, motels and tourist bungalows.

In addition to providing accommodation in retiring rooms in railway stations, the Indian Railways run 3 hotels at Aurangabad, Puri and Ranchi.

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

A sum of 50 million rupees has been provided for disbursement as interest-bearing loans to the hotel industry for :-

- (a) Construction of hotels of the standard suitable for occupancy by foreign tourists.
- (b) Renovation and expansion of existing hotels on the approved list of the Department of Tourism to improve existing standards and/or to provide additional facilities.

(iii) Income tax and other concessions on hotels income:

- (a) Subject to certain conditions the profits of certain types of hotels will be exempted up to 6% of the capital employed for a period of 5 years commencing from the year in which the hotel starts functioning. The dividends in the hands of share-holders for new hotels will also be eligible for similar tax concessions.
- (b) Development rebate: 25% to 35% of the actual new machinery installed in the new premises used as a hotel.
- (c) A deduction of 8% on the taxable profits has been allowed to the hotel industry now recognised as a priority industry.
- (d) Depreciation: When assessing income tax, subject to certain conditions, a depreciation of 24% of the actual cost of erection has been allowed for the first year on new buildings completed after 31st March, 1967.

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

None.

(v) Provision of public funds for publicity purposes:

A sum of Rs. 12,400,000 was sanctioned by the Government for tourist publicity during 1969-70. This sum includes an amount of Rs. 6,000,000 for advertising and allied publicity through eight Government of India Tourist Offices overseas located in New York, San Francisco, Chicago, Mexico, Toronto, London, Tokyo and Sydney. Besides these offices, six Tourist Offices in Europe also undertake publicity in joint collaboration with Air India for which a separate allocation is made.

A variety of tourist literature in the form of colourful folders, posters, guide books, picture postcards, inserts, maps etc. is produced. Credible motivational publicity is also obtained by arranging special tours for overseas journalists, travel writers, travel agents and the like. A publicity campaign has been launched to create a bias for tourism among the general public in India.

The Department of Tourism participates to a limited extent in fairs and exhibitions. One of the major events in which the Department is participating is EXPO '70 in Osaka, Japan.

Window displays are arranged in various centres overseas using Indian handicrafts and other display material. Photographs, colour slides and tourist documentary films are supplied to tourist offices and Indian Missions.

(vi) Government expenditure on infrastructure :

| | |
|---------|---------------|
| 1966-67 | Rs. 2,349,000 |
| 1967-68 | Rs. 2,892,000 |
| 1968-69 | Rs. 4,904,360 |

5. Action Taken During the Current Year

(i) South Asia Travel Commission Conference:

Conference of the Ministers of Tourism of the SATC region was held in New Delhi on 14-15 March, 1969. Except for Pakistan, delegates from all other SATC countries, namely, Afghanistan, Ceylon, Iran, India, Mongolia and Nepal attended. The Conference adopted resolutions relating to the setting up of a permanent SATC Secretariat in New Delhi, research surveys, cultural tourism, familiarisation tours, hotel classification, tourism training, transformation of IUOTO into an Inter-Governmental body and promotional air fares and charters.

(ii) Forty new hotel projects in the private sector are under various stages of completion. These include three luxury hotel complexes in Bombay being set up by Indian parties in collaboration with Intercontinental Hotels Corporation, USA; Sheraton International Inc., USA, and Hilton Hotels Corporation, USA.

(iii) An amount of Rs. 4,654,000 was distributed for making improvements in existing hotels or for building new hotels during 1969-70.

(iv) Development of Resorts:

The development of Gulmarg as a winter sports resort has made encouraging progress. A Ski Instructors' Training School has been established; a road from Tangmarg to Gulmarg has been built; top quality ski equipment and snow clearing equipment has been imported from Austria and West Germany and an indigenously manufactured ski lift has been installed.

The first phase of the development of Kovalam as a beach resort has been initiated with the acquisition of land at Kovalam.

(v) Facilitation:

The Government of India has abolished visas on reciprocal basis with the Nordic countries and West Germany. The validity of the Temporary Landing Permit has been extended from 72 hours to 21 days. Ceiling on the number of charters has been removed and the charters are now permitted to discharge tourists at an Indian airport and pick them up from an airport outside India and vice versa. The international airports of Bombay, Delhi, Calcutta and Madras are being expanded and remodelled to cope with the jumbo jets. An entirely new building of Calcutta airport is coming up.

(vi) Operation Europe:

This arrangement with Air India for joint promotion of tourism was remarkably successful in 1969. Under this operation all Air India offices in Europe have been entrusted with promotion of tourist traffic to India. It is proposed to bring the UK also under this arrangement from 1.4.1970.

6. Future Plans for the Industry

(i) The Department of Tourism has the following short and long-term objectives:

- (a) improvement of facilities at airports;
- (b) improvement of reception and facilitation procedures;
- (c) construction of new hotels or increasing the accommodation in existing hotels and other units providing board and lodging facilities;
- (d) provision for loans for hotel construction under the Hotel Development Loans Scheme;
- (e) facilities for hotel reservation on arrival at airports;
- (f) better co-ordination between travel agents, hoteliers and the transport agencies and the Tourist Departments

of the Centre and the States;

- (g) promotion of indigenous entertainment shows;
 - (h) publicity campaigns;
 - (i) integrated development of areas of tourist interest; and
 - (j) improvement of transport arrangements - rail, road and air.
- (ii) Fourth Five Year Plan on Tourism is based on the following broad criteria:
- (a) Concentration of resources on the integrated development of selected areas/resorts and routes which have the highest potential for tourist promotion and are capable of yielding quick returns.
 - (b) Development of tourist infrastructure and strengthening and expansion of the tourist plant through public sector investment.
 - (c) Incentives to the private sector for improvement and expansion of the existing tourist plant.
- (iii) Integrated Projects:
- The Fourth Five Year Plan on Tourism includes a number of major projects. These are the winter sports resort at Gulmarg, beach resort at Kovalam, development of selected Buddhist Centres, promotion of wild life tourism, a net-work of youth hostels and son-et-lumiere spectacles at selected places. The object is to develop India into a coveted destination.

Jamaica

Jamaica's tourist potential lies in its ready accessibility to both North and South America, its many natural endowments such as beaches, scenic interior including tropical plantations and mountains, and its tropical, though equable climate.

1. Value and Extent of the Tourist Industry

| | | |
|-----------------------------|-------|---------|
| Number of tourist arrivals, | 1966: | 345,288 |
| | 1967: | 332,838 |
| | 1968: | 396,347 |
| | 1969: | 407,105 |

Mainly from United States, Canada and United Kingdom. The drop in 1967 was due solely to a decrease in the number of armed forces personnel on shore leave. Excluding this category of visitor the numbers of tourists for the five years were 245,286; 294,947; 303,481; 352,481 and 374,306 respectively.

Foreign exchange receipts from tourism,

| | | |
|--|-------|-------------------------------|
| | 1966: | J\$56.0 million |
| | 1967: | J\$57.8 million |
| | 1968: | J\$73.2 million |
| | 1969: | J\$77.9 million (provisional) |

As a percentage of total foreign exchange earnings,

| | | |
|--|-------|---------------|
| | 1966: | 19.0% |
| | 1967: | 19.0% |
| | 1968: | 21.5% |
| | 1969: | not available |

Tourism is the second largest foreign exchange earner. It ranks after bauxite and alumina, having exceeded sugar in 1965.

2. Official Promotional Organisation

The Jamaica Tourist Board is a statutory body established and maintained by Government funds, consisting of five members directly appointed by Government, not for the representation of sectional interests, but on the basis of their knowledge of the tourist industry.

The five members are made up by the Director and Assistant Director of Tourism, the Financial Controller of the Board, a representative of the Ministry of Trade and Industry and the Executive Director of the Jamaica Industrial Development Corporation. There is also a full-time Secretary. The Board's sales offices are situated in New York, Chicago, Miami, Los Angeles, San Francisco, Toronto, Montreal and London. The Sales Section within the Board also works through an advertising firm with offices in New York, Los Angeles and London for promotional purposes.

It also works with travel agents and through commercial enterprises in the United States, Canada and the United Kingdom and is heavily involved in encouraging group travel to the island. The Board has also created a Development Department in order to increase the supply of accommodation and also to secure improvements, through representations to Government, of the roads, airports and other amenities and facilities for tourists.

Its Public Relations Department maintains a flow of information through various media; press, radio and television in the United States, Canada and the United Kingdom. The Board works in close liaison with organisations from the private sector of the industry in Jamaica. It represents Jamaica at international and regional tourist conferences and, in co-operation with other national tourist organisations in the area, is interested in developing the region as a whole.

3. Internal and Infra-structural Organisation

The Jamaica Hotel and Tourist Association represents most of the hotel interests in the private sector.

The Jamaica Association of Villas and Apartments represents the majority of the owners of resort cottages and tourist apartment homes. Close liaison is maintained with the Tourist Board by both these organisations.

Jamaica Air Services operates and promotes flights between all major resorts in the island, while the "U-Drive" Association represents the firms engaged in renting cars to tourists.

4. Government Participation

(i) Ownership or shares in hotels:

Apart from the Sheraton Kingston and the Ocho Rios Hilton in which Government corporations have interests, all the hotels are privately owned.

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

Government is prepared to consider, subject to certain conditions, the guaranteeing of loans up to two-thirds of the total cost, including land, of hotels with not less than 350 rooms, which may be specifically declared as convention hotels. The Jamaica Development Bank will also offer medium term loans for hotels and other types of tourist development.

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

The Hotels (Incentives) Act, 1968 was passed in March 1968. Under this Law approved hotels will enjoy an income-tax-free holiday from ten to fifteen years depending on location. All convention type hotels (minimum 350 rooms) will benefit from the fifteen year holiday. Due to double taxation reliefs this law is especially beneficial to those countries which have agreements with Jamaica for the exemption of their citizens from double taxation.

There are no death duties in Jamaica.

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

Under the same law, almost all building materials and most items of equipment for new hotels or extensions to old hotels which are not locally produced and need to be imported from abroad, are duty free.

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

The following data indicate the way in which public funds allocated to the Jamaica Tourist Board and used mostly for publicity and promotion, have grown over the last few years:

| | | | |
|--------|---------|--------------|--------------|
| Fiscal | 1966/67 | (£1,025,000) | J\$2,050,000 |
| Fiscal | 1967/68 | (£1,132,000) | J\$2,264,000 |
| Fiscal | 1968/69 | (£1,300,000) | J\$2,600,000 |
| Fiscal | 1969/70 | (£1,650,000) | J\$3,300,000 |

- (vi) Government expenditure on infra-structure:

There has been substantial investment in the two international airports at Kingston and Montego Bay and plans are now being made for the reconstruction of the buildings and their facilities at these two airports to make them suitable for the jumbo jet age. Additionally, Government has built two airfields at Ocho Rios and Port Antonio and a third at Kingston to take care of the needs of local air traffic. Three other airstrips are planned for Black River in the south-west, and for Braco and Lucea in the north-west.

Considerable expenditure has been undertaken in the improvement of roads in the tourist areas and encouragement has been given to private enterprises for the building of new docks for ships. The Government is itself building a cruise-ship pier and ancillary facilities to provide better access to the developing area of Port Antonio.

5. Action Taken During the Current Year

A Cruise and Convention Bureau was set up with headquarters in Miami, with a view to stimulating these two types of business and to setting the stage for the convention hotels which will start operation as from 1970.

The Visitor Service Bureau with its Courtesy Corps, aimed primarily at assistance to, and security of visitors, was significantly extended with additional offices in Montego Bay and Runaway Bay.

The Hotel Training School was opened in January 1969 and training is provided initially for waiters, room maids, cooks, receptionists, night auditors, bellboys and bar waiters. The annual out-turn is expected to be around 150 students. Practical experience is gained in training through the operation of a 20-room hotel on the site.

A special examination was carried out as to the way in which domestic agriculture could become more geared towards supplying the

tourist industry and the matter is being pursued by the various organizations involved.

6. Future Plans for the Industry

The immediate aim of the Jamaica Tourist Board is to increase the amount of accommodation available to visitors. Approximately 700 rooms were added to visitor accommodation during 1969 and at present over 2,000 additional rooms are under construction with the 1970 summer season expected to start with a capacity of around 29 per cent above that of the commencement of the 1969 summer season. At the moment, emphasis is being laid on the convention type hotel due to the present lack of large hotels. In the meantime, the construction of resort cottages is being encouraged. There is a growing need for them; they can be built reasonably cheaply and the cost is within the reach of Jamaicans. By such development local interest in tourism is increased.

Kenya

Kenya's tourist potential lies mainly in its warm climate and natural endowments such as its vast reserves of wildlife, its excellent beaches, its national parks, the scenic beauty of its Highlands, the traditional customs of the colourful dancers and above all the natural hospitality of its people.

1. Value and Extent of the Tourist Industry

| | |
|--|-------------------------------------|
| Number of tourist arrivals, (from countries overseas) | 1966 : 103,551 |
| | 1967 : 127,667 |
| | 1968 : 215,294 |
| | 1969 : 108,572 (January to June) |

Mainly from United Kingdom, United States and Western Europe.

| | |
|--|-----------------------|
| Foreign exchange receipts from tourism, | 1966 : £K14.3 million |
| | 1967 : £K15.7 million |
| | 1968 : £K16.2 million |
| | 1969 : not available |

| | |
|--|----------------------|
| As a percentage of total foreign exchange earnings, | 1966 : 10.3% |
| | 1967 : 15.2% (gross) |
| | 1968 : not available |
| | 1969 : not available |

2. Official Promotional Organisation

The Kenya Tourist Development Corporation is a statutory board established in November 1965, by an Act of Parliament. Prior to 1965, tourism was promoted by a voluntary association, the East African Tourist Travel Association which received financial support from the three East African governments and from private bodies. With the advent of independence it became necessary for each country to set up its own tourist office. The KTDC has a board consisting of a chairman and about ten members drawn from the Permanent Secretaries to the Ministries for Tourism and Wildlife, Economic Planning and Development, Finance, and Natural Resources, and such other persons who possess qualifications that might be of benefit to the Corporation, and these include among others the representatives of hotels, tour operators, airlines and travel agents.

The Chief Executive Officer of the Corporation is the General Manager who is responsible for the day to day management of the business of the Corporation. The Corporation is subject to the general and special direction of the Minister of Tourism and Wildlife.

The functions of the board include the investigation and formulation of projects for the promotion and expansion of new and existing enterprises; assisting other authorities or persons either financially or in any other way to perform any functions aimed at promoting tourism; the operation of hotels,

motels, lodges, camping sites, restaurants and other places of accommodation, refreshment or recreation; promoting or advertising tourism; providing, maintaining or improving transport facilities; the provision of information and booking facilities for tourists; the development and preservation of wild-life and the natural flora and fauna of Kenya.

In order to step up the promotion of the tourist campaign, the Ministry has set up tourist offices in London, Frankfurt and New York and other overseas offices are planned. Tourist literature and films are also sent to all embassies overseas. In a joint effort each establishment carries out distribution of tourist literature to tour operators, travel agents and individuals in its area of jurisdiction.

3. Internal and Infrastructural Organisation

Airlines, shipping companies and tour operators assist in promoting Kenya's tourism in association with the Ministry. Tour operators often plan their itineraries without regard to national boundaries, taking East Africa as a single tourist zone.

The East African Hotelkeepers' Association comprises 60 hotels at present who are the members. Such hotels are normally regarded as tourist hotels for the purpose of classification.

The Board of Trustees of the National Parks administers the Kenya National Parks and archaeological sites. The County Councils, however, administer the game reserves within their jurisdiction. But the Game Department is responsible for the preservation of game and general game policy, including the issuing of hunting licences and demarcation of hunting zones.

4. Government Participation

(i) Ownership or shares in hotels:

In 1965 the Government requested a hotel expert to make a feasibility study of the construction and improvement of tourist lodges. On the basis of the report, the Government has set up a company known as the Kenya Safari Lodges and Hotels Ltd., in which it holds shares through the Kenya Tourist Development Corporation. This company started its work by erecting two lodges each of 100 beds in the Tsavo National Parks, one at Voi and the other at Ngulia. The company has also erected a 200 bed hotel at Nyali Beach, Mombasa, on the Coast of Kenya. Two large hotels, the Inter-continental with 400 beds and the Hilton International with 600 beds estimated to cost approximately £4 million have been completed during 1969. An existing hotel, the Panafric, has been expanded to include an additional 72 single rooms. The Government through the KTDC is participating in all these ventures. With the assistance of the KTDC a programme of hotel and lodge modernisation and expansion has also been carried out. The Kenya Tourist Development Corporation has invested in Wilkenair Ltd., which deals with light aircraft. Light aircraft flying has become a common medium of travelling

among tourists in Kenya and is a rapidly growing section of the tourist industry. The KTDC involvement stems from the desire to ensure that the best possible services and facilities are offered to tourists.

- (ii) Financed assistance specifically available:

See (i) above.

- (iii) Income tax and other concessions on hotel income:

There is a 20 per cent investment allowance for hotel development exceeding a minimum of £4,000.

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

None.

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

Expenditure on promotion met from Ministry of Tourism recurrent budget is estimated to total £225,000 in Kenya's Development Plan 1969-1973.

- (vi) Government expenditure on infrastructure:

A revised tourism development plan for the period 1969-1973 envisages the expenditure of £10.5 million of which £3 million would be contributed by the public section, in hotel and lodge accommodation. Expenditure on improving the infrastructure is estimated at £8.3 million, including £2.5 million on tourist roads, £0.7 million on national parks and reserves, £0.6 million on the Game Department and £3 million on airports. The Government, in co-operation with the East African Hotelkeepers' Association, has set up a Hotel Training School. Experts have been invited to advise on the improvements required for the Mombasa airport to enable it to take a larger type of aircraft bringing package tourists. In 1968 the Government received plans envisaging an outlay of more than £30 million for the development of air traffic in the Nairobi area. The plans call for a continuous programme of capital expenditure up to the year 1990, but the first stage of development, to be completed by 1972, will cost at least £9.5 million. The first stage includes the development of Nairobi Airport at an estimated cost of £6.27 million and the construction of a new Wilson Airport on the Athi River plains, about 15 miles from Nairobi, for £1.46 million. A proposed new Air Traffic Control Centre, with further navigational aids, would cost about £2 million and is considered necessary by 1973.

5. Action Undertaken During the Current Year

- (a) Lodges - the following were completed in 1969:-

- | | | |
|-----|--|----------|
| | Voi Safari Lodge | 100 beds |
| | Ngulia Safari Lodge | 100 beds |
| | The Ark | 60 beds |
| (b) | Hotels - Intercontinental Hotel | 400 beds |
| | Hilton Hotel | 548 beds |
| | Mombasa Beach Hotel | 100 beds |
| (c) | Roads - The development of tourist roads all over the country has been phased in three stages. The aim is to bring up to all-weather condition access as well as internal routes within the parks and game reserves. By the end of 1969, Phase I and II had been completed and plans for the development of Phase III had been finalized. In line with the development of tourist roads work has continued on the main trunk roads. Bituminisation of Nairobi-Addis as well as Athi River-Namanga roads has continued. It is hoped to have a highway running from Tanzania to Addis all through Kenya when work on these roads is completed. | |

6. Future Plans for the Tourist Industry

It is quite obvious that tourism in Kenya has enormous potential for growth.

Holiday traffic grew at the rate of 28 per cent between the end of 1961 and the end of 1966, and 32 per cent from the beginning of 1964 to the end of 1966. Projecting these figures forward until the end of 1973, the indications are that Kenya can expect to receive 385,000 visitors. Of the additional 6,568 beds which it is estimated will be required by the end of 1973 nearly 70 per cent will be sited on the Coast and in the wildlife areas. It is recommended that certain plots of State and Trust Land at the Coast should be allocated and developed as hotel sites in conformity with the proposed Town Planning Zoning Scheme and that infrastructural development in these regions should be given high priority. In up-country areas emphasis will be placed on the modernisation of premises to raise their economic viability.

Lesotho

Lesotho's tourist potential lies in its spectacular mountain scenery (Thabana Ntlenyana 11,245') which is snow-capped in winter enabling skiing; the Maletsunyane falls, 630' in height; trout fishing; places of historical interest, such as Matsieng, home of the Paramount chiefs and the cave-house of Masitise. There are also numerous examples of Bushman rock paintings, dinosaur foot-prints and fossilised plants.

1. Value and Extent of the Tourist Industry

Number of tourist arrivals, 1966: 3,600 (est.)

Mainly from South Africa, and a few from Western Europe, generally as part of a tour of Southern Africa.

Foreign exchange receipts from tourism,
1967: R.28,000 (approx.)

As a percentage of total foreign exchange earnings,
1965/66: 1.1% (approx.)

2. Official Promotional Organisation

The Tourist Board, a statutory body, established early in 1967 to develop tourism in Lesotho has a membership comprised of the Permanent Secretary for Economic Development, the Director of Information and Broadcasting, a representative of a local travel agency Maluti Treks and Travel Pty. Ltd., and a representative of the local air charter company BASUTAIR. The Government is planning to set up a Department of Tourism in the near future.

The functions of the Board are to instigate immediate action to increase tourism in Lesotho through both promotional activity and development.

Facilitation - action has been taken for the simplification of entry and departure formalities and for reciprocal arrangements for visas.

Overseas representation - the Board has not yet established offices abroad for tourism promotion; however, diplomatic and consular officials represent Lesotho tourist interests overseas. The possibility of using Honorary Consuls is under discussion.

Familiarization tours - a local travel agency organises tours for airline operators journalists tour operators etc.

The Board is not yet a member of any international or regional tourist organisation.

* Information unrevised since June, 1968, as further information on Lesotho was not available at time of publication.

3. Internal and Infra-structural Organisation

District councils are encouraged to provide facilities for tourists, such as caravan parks with water and sanitation. Rest huts have been constructed in several places in the mountain areas.

Hotels - there are six hotels in Lesotho, which provide 198 beds and 4 tourist lodges with total of 34 beds for adequate overnight accommodation and the Government is interested in the construction of more good hotels. Work began, in January 1968, on the first hotel to be built in Mafeteng on a major road junction. As yet no ad hoc board has been constituted for the purpose of assisting in hotel development.

Airline - a national airline, Lesotho National Airways, was formed by the Government and Basutair, the local charter company. Operations were inaugurated on 2nd October 1967 for scheduled, twice-weekly flights by Lesotho Airways, between Maseru (capital of Lesotho) and Johannesburg and reciprocal flights by South African Airways began on 6th October 1967. An air service agreement between the two countries was finalised during 1968. Internal flights on a scheduled or charter basis are operated by Basutair to all major centres.

Roads - the Government is carrying out extensions and improvements to road-networks. Six new road projects are at present being undertaken and there are plans for a £30 million trans-Lesotho road, if supporting finance can be obtained from South Africa.

Resorts - no areas have been specifically developed for tourism although some facilities exist in the Oxbow area, at Maletsunyane falls and Makarakabei. Facilities for skiing, including instruction are available at Sani Pass where there is a small chalet. Maluti Treks have purchased snow-making equipment and if all goes well will offer regular skiing starting in the winter of 1969.

A team of Austrian experts on tourism recently visited Lesotho to study its tourism prospects. They recommended that by combining the complementary attractions of Lesotho with South Africa, a more comprehensive holiday could be offered to tourists from America and Europe - to the extent of justifying tours for travel groups by charter flights.

4. Government Participation

(i) Ownership or shares in hotels:

The Government does not own or hold shares in hotels, although it is likely to do so in the future. (The tourist camps at Marakabei (6 beds) and Maletsunyane (6 beds) are owned by the Government and leased to the local travel agency.)

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

None, although the Lesotho National Development Corporation could participate through capital contribution.

- (iii) Income tax and other concessions on hotel income:
At present a new Pioneer Industries Bill is being drafted, this, however, would provide for elaborate tax concessions.
- (iv) Import duty concessions on material and equipment for hotel and other tourist construction:
None.
- (v) Provision of public funds for publicity purposes.
None.
- (vi) Government expenditure on infra-structure:
Apart from extensions to the Marakabei tourist camp costing R 5,000, the government has not yet made financial contributions specifically for the development of tourism. But general road development is, of course, helping to promote tourism by opening up previously inaccessible parts of the country.

5. Action Taken During the Current Year

Not available at time of publication.

6. Future Plans for the Tourist Industry

Firstly, the establishment of the Department of Tourism and the appointment of a Director and staff. It is envisaged that the Department's duties will include - the collection of tourist statistics, inspection and improvement of hotels and other tourist facilities, the establishment of tourist information centres and of car-hire facilities, and the co-ordination of all Government departments involved in tourism. Co-ordination of government policy with private business interests. Advising government of appropriate legislation - publication and distribution of publicity material, liason with domestic and foreign press on tourism matters, promoting of public understanding of tourism throughout Lesotho.

Malawi

Malawi's tourist potential depends largely on its unique Lake, whose pleasure resort possibilities are virtually unlimited, its superb mountain scenery and bracing highland climate, its angling and mountaineering facilities, and its small but developing national parks which offer a wide range of fauna to the viewer. Its strategic position on the continent of Africa is also of great importance, as is the innate friendly courtesy of its inhabitants.

1. Value and Exent of the Tourist Industry

| | | |
|---|--------|----------|
| Estimated number of tourist arrivals, | 1968 : | 6,400 |
| | 1969 : | 6,800 |
| Foreign exchange receipts from tourism, | 1968 : | £160,000 |
| | 1969 : | £180,000 |
| As a percentage of foreign exchange earnings from services, | 1968 : | 2.5% |
| | 1969 : | 2.5% |

2. Official Promotional Organisation

Tourism and hotels are the responsibility of the Ministry of Information and Tourism, whose Department of Tourism is the country's official tourism promotional organization. The country also has a Tourism and Hotels Board which is advisory to the Minister of Information and Tourism.

The Department of Tourism evolved from the original Division of Tourism of the Ministry of Trade and Industry. The Division was formed in 1963 charged with the threefold task of (a) investigating the country's tourism potential, (b) preparing plans for its effective exploitation, and (c) producing tourism promotional material.

The country's tourism potential has now been fully investigated through a number of surveys, and comprehensive plans for its exploitation have been finalised and are in the process of implementation. On the score of tourism publicity, the Department produced the following items in 1969: a 50-page Holiday Guide, a Visitors' Fact Sheet, a Pictorial Guide, two maps, a poster, two windscreen stickers and an information wallet. The Department also maintained throughout the year its series of regular fortnightly illustrated press features on Malawi holiday attractions; these have a wide circulation inside Africa. The Department also assisted commercial enterprises in the production of colour calendars, maps, postcards, slides and brochures.

The Department works closely with the Tourism and Hotels Board and, indeed, is closely associated with all Government effort that directly or indirectly has an effect on improving conditions for tourists visiting Malawi.

Abroad Malawi is represented tourism-wise by its seven High Commission, Embassy and Government Representative offices, by the external

offices of Air Malawi, the national airline, and by the Malawi Buying and Trade Agents in London.

3. Internal and Infrastructural Organisation

Communications, both by road and air, were improved during 1969. An extensive programme of road bituminization was begun and by 1970 all main tourist routes to the resort areas on Lake Malawi, to the main plateaux and to the national parks will be mainly tarred roads or first-class gravel roads on a 32 ft. formation. This standard compares favourably with that of neighbouring countries.

Air communications have similarly been improved and extended. Externally Malawi is now linked by regular scheduled services to the United Kingdom, Europe, East Africa, the Far East, Rhodesia, Zambia, Mozambique, South Africa, Malagasy and Mauritius. Internally, the national airline operates scheduled flights to the mainline airports of Lilongwe, Mzuzu and Karonga, using HS 748 turboprop aircraft. Schedules to smaller air centres are provided by nine-passenger twin-engined aircraft and these and smaller aircraft are also available for charter. Chileka, the country's international airport near Blantyre, accepts Comets and VC 10s.

In the sphere of hotel accommodation major improvements have been effected. Standards of private sector hotels throughout Malawi have been raised following the introduction and implementation of appropriate hotels legislation, and one new private sector Lake-shore hotel was built during the year. In addition, the Government through the Malawi Development Corporation, a statutory body established by Government to assist in the promotion of the country's commerce and industry, has both built new hotels and acquired and improved existing hotels. The largest MDC hotel is the 193-bed Mount Soche Hotel, which opened in February, 1969, to provide the City of Blantyre with accommodation at international level. Also completed in 1969 for opening in early 1970 was the 36-bed Nkopola Lodge, a holiday hotel on the Fort Johnston Lake-shore. The 20-bed tourist hotel, the Ku Chawe Inn, situated on the lip of Zomba plateau, was the first private hotel to be acquired, improved and extended by the MDC. This was followed by the acquisition of the 60-bed Lilongwe Hotel situated near the new capital site.

Game camp accommodation has been considerably improved during 1969 and the country's chain of resthouses was also surveyed to enable planning to take place for their modernisation.

Training - The MDC hotel chain is professionally managed and the management organization provides Malawians with training both at home and overseas.

Game Reserves - Malawi has three main National Parks, one in each region: Langwe in the south, Kasungu in the Central Region and Nyika in the north.

4. Government Participation

(i) Ownership or shares in hotels:

The Malawi Government owns no shares in existing private hotels. It has raised loans, mostly from the Commonwealth Development Corporation, with which

to build new hotels and acquire existing hotels.

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

Small loans are, in principle, available to hotel proprietors.

- (iii) Income tax and other concessions on hotel income:

The Income Tax Ordinance of 1963 provides for allowances on certain capital expenditure incurred by taxpayers on the construction and equipment of "industrial buildings" which are defined so as to include hotels as follows:-

- (a) Initial Allowance - in respect of capital expenditure incurred during the year of assessment on the construction of new industrial buildings or additions or alterations to industrial buildings and in respect of implements, machinery etc., used by the taxpayer for his trade.
- (b) Annual Allowance - in respect of capital expenditure on on industrial buildings or implements, machinery, utensils etc., used by the taxpayer for the purpose of his trade, the value of which has been diminished by wear or tear.
- (c) Investment Allowance - equal to 10% of the cost of new and unused industrial buildings, plant or machinery intended for manufacturing purposes.
- (iv) Import duty concessions on material and equipment for hotel and other tourist construction:

The Customs and Excise Tariff provides for special low duty on crockery, cutlery etc., marked with the name of a hotel licensed under the Hotels Act of 1965.

Remission of duty may be granted on any goods imported for the purpose of the establishment of any industrial undertaking or enterprises (including a hotel) deemed by the Minister of Finance to be of national importance.

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

Virtually all the country's tourism publicity is financed by the Malawi Government.

- (vi) Government expenditure on infrastructure.

See section 3 above.

5. Action Taken During the Current Year

Internal scheduled air services were improved by the introduction

of HS 748s to replace the existing DC3s. A British Norman Islander was also acquired by Air Malawi for use on scheduled services and on charters. External scheduled flights to Europe and to territories within Africa were increased in number and the range widened.

Work commenced on tarring the main road from Zomba to Lilongwe.

Regular hotel inspections were continued to implement the new hotels legislation and a marked improvement in the standards of private sector hotels resulted.

The MDC's Blantyre hotel, the Mount Soche, was opened in February; by the end of the year work was practically complete on the MDC Lake-shore hotel at Fort Johnston, the Nkopola Lodge, scheduled for opening in early 1970. The MDC acquired, refurbished and commenced extensions to two private sector hotels: Ku Chawe on Zomba Plateau, and the Lilongwe Hotel.

Game camp accommodation was improved and extended, particularly at the Lifupa Game Camp in the Kasungu National Park.

A further survey of the country's tourism potential was carried out by a tourism expert.

The Tourism and Hotels Board met regularly to consider the country's tourism development generally and to advise the responsible Minister on this subject.

The Department of Tourism was expanded to keep pace with the country's developing tourism industry and its publications output increased.

Efforts were made to encourage private investment in the field of hotel operation and considerable interest was shown by a number of concerns. One practical result of this was the construction of the first new private hotel to be built in the country for several years, the 36-bed Club Makakola, which is sited on the Fort Johnston Lake-shore. Work was almost complete by the end of the year and the hotel is scheduled for opening early in 1970.

6. Future Plans for the Industry

The Government plans to continue to improve and expand its communications system, both by air and road.

Hotels legislation is to be extended to cover the operation of restaurants and to allow for the classification of hotels.

During 1970 the number of hotel beds in the country will be increased from 622 to 801. The Government plans to treble the number of hotel beds over a three-year period at a cost of some £1 million.

Further improvements and extensions to game camp accommodation are to be made and the resthouse chain in the Central and Northern Regions is to be rationalised and improved.

A planned promotional campaign is to be undertaken in nearby territories on the Continent with a view to increasing significantly the flow of car and air tourists to Malawi. With this object in view, the government will

participate in exhibitions outside Malawi, will send high level delegations to tour nearby countries to meet press and travel trade representatives; will encourage private investment in the country's hotel industry; will participate in regional tourism conferences, hosting some; will undertake press advertising campaigns; will introduce air package tours; will increase the output and widen the scope of the tourism publications produced by the Department of Tourism; and will expand the Department to enable it efficiently to undertake its extended role in the above programme.

Malaysia

Malaysia's tourist potential lies in her position on most of the main round-the-world and around the Pacific sea and air travel routes and in its variety of scenery that ranges from eternal greenery, mountains, beaches, holiday islands, hill resorts and game parks to historic and refreshingly modern architecture.

1. Value and Extent of The Tourist Industry

| | |
|---|--|
| Number of tourist arrivals, (Only those entering by air and sea at Kuala Lumpur, Penang and Port Swettenham) | 1966: 45,914 1967: 42,775 1968: 50,662 1969: 53,229 |
|---|--|

Mainly from United States of America,
United Kingdom, Japan, Australia and India.

| | |
|--|---|
| Foreign exchange receipts from tourism, (Bank records of traveller's cheques, drafts and letters of credit cashed) | 1966: M\$20.5 million 1967: M\$25.8 million 1968: M\$26.2 million 1969: M\$19.3 million (Jan.-Oct.) |
|--|---|

| | |
|--|---|
| (Bank records of traveller's cheques only) | |
| As a percentage of total foreign exchange earnings, | 1966: 0.5% 1967: 0.6% 1968: 0.6% 1969: not available |

2. Official Promotional Organisation

Department of Tourism within the Ministry of Commerce and Industry is the national tourist organisation of Malaysia.

Promotion - The Department serves as the national organ for publicising Malaysia abroad. Its marketing activities include advertising in magazines and newspapers mainly in United States, Australia, Europe and North Pacific; press publicity in the United States, Europe, Japan and Australia through the services of 4 publicity and public relations agencies in these markets; production and world-wide distribution of information publicity and merchandising publications and materials including films; participation in national and international fairs and displays and organising familiarisation tours for overseas tour operators and travel writers. Malaysia has an overseas tourist office in Singapore and the same functions are performed by Malaysian trade missions, the Department's Publicity and PR Agencies as well as Malaysia/Singapore Airlines abroad.

Development - The activities of the Department extend to the planning, programming and management of development projects undertaken by the Federal Government and provision of technical assistance and advice on the facilities and amenities undertaken by State Governments and private sectors.

Liaison and Co-ordination - The Department maintains active liaison with the public sector in matters of facilitation, legislation, development projects and surveys that are likely to contribute to the development of tourism. At the same time it works in an advisory capacity in co-ordinating all tourist activities of State Governments and the private sector, and in ensuring that high standards of tourist services are maintained.

Assistance and Co-operation - Both financial and other support is rendered by the Department to the private sector in encouraging the establishment of tourist associations and in assisting the private sector in their local tourist promotional efforts and organisation of training courses for tourist guides and hotel and catering staff. The tourist associations co-operate with the Department in providing, where required, receptions and sightseeing tours for groups of important travel personnel.

Malaysia is a member of both IUOTO and PATA.

3. Internal and Infra-structural Organisation

On state level - 9 of the 13 states have established State Tourism Committees to assist State Governments in developing and improving tourist facilities in their respective States. Three maintain their own tourism bureaux with state Tourist Promotion Officers.

In the private sector - There are 17 regional Tourist Associations, 2 Tourist Guide Associations, 2 Hotels and Restaurants Associations and a Federation of Tourist Associations (FOMTA) to which the regional tourist associations are affiliated. All are private organisations established by travel trade circle in co-operation with the regional or local authorities. 6 Tourist Associations maintain their own information centres. There are, at present, 116 tour operators/travel agents.

Hotels - There are 83 international class tourist hotels with a total of 6,766 beds. Hotels are regulated by local authorities.

Malayan Railway - Malaysia's national railway services West Malaysia as well as extension services to as far south as Singapore and as far north as Bangkok.

Malaysia-Singapore Airlines services both domestic and international air flights. MSA connects Malaysia to Singapore, Brunei, Bangkok, Hongkong, Tokyo, Jakarta, Denpasar, Darwin, Perth, Brisbane and Sydney.

4. Government Participation

(i) Ownership or shares in hotels:

All hotels and restaurants are privately owned. Government is in the process of constructing, for the first time, 2 motels under the 5-Year Development Plan.

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

Direct financial assistance is not available. However, the Malayan Industrial Development Finance Ltd., which is a financing body set up by the Government to help in the

development of industries, provides loans for the development of hotels and tourist resort complexes.

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

Government has offered incentives to investors in luxury 1st and 2nd Class Hotels. This includes the granting of pioneer status; abatement of chargeable income for a period of 12 years, accelerated depreciation allowance and industrial building allowance.

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

No concessions are available at the moment.

(v) Provision of public funds for publicity purposes:

The Department of Tourism has been allocated M\$700,000 for marketing activities for 1970. Another M\$35,000 have been provided to assist local tourist associations and other organisations connected with tourism.

(vi) Government expenditure on infra-structure:

Under the First Malaysia Plan (1966-1970), M\$2,053,074 million have been allocated to the Department of Tourism to implement 10 tourist projects.

5. Action taken during the Current Year

In marketing, Department of Tourism intensified its activities by:

- (i) Inviting wholesale tour operators and prominent travel writers to Malaysia on familiarisation tours.
- (ii) Appointing three Publicity and PR Agencies in London, Sydney and Tokyo to service the Department's activities in the European, Australian and Japanese markets.
- (iii) The production of a special news and feature folio for distribution to editors, travel trade and carrier journals to assist them with supplies of editorial copy.
- (iv) Commissioning a Hollywood Film Company to produce a new colour film on Malaysia.

In the development of Malaysia's visitor plant, work on the building of the Department's motels also commenced during this year. Plans for several of the other projects approved under the Five Year Plan were also finalised. Private sector development of hotels and resort areas was given a boost by Government's declaration of incentives.

The Tourist Associations in Malaysia held their Third Seminar and established the Federation of Malaysian Tourist Associations.

Malaysia won a bid to host the 1972 Pacific Area Travel Association (PATA) Workshop and Conference at the PATA Conference in Bangkok.

6. Future Plans for the Tourist Industry

In order to cope with its future responsibilities, the Department of Tourism will be reorganised, besides the Directorate, into 3 sections:

- (i) Marketing Section which will intensify and expand the Department's marketing programme particularly in the Australian and European markets.
- (ii) Development Section which will encourage and assist the introduction of more cultural and indigenous entertainments for tourists, and
- (iii) Planning and Statistics Section which will work closely with International Organisations such as the IUOTO in producing inventories on visitor plant development requirements and will provide more comprehensive technical information to the private sector in Malaysia to assist the sector in the development of visitor facilities and amenities. A Convention Bureau will also be established in the Section to work closely with delegations to international conferences to induce more international conferences to be held in Malaysia.

Government's new industrial policy of stimulating all types of industries to create additional employment opportunities will greatly assist in the development of the tourist industry in the coming years.

Malta

The Maltese Islands (Malta-Gozo-Comino) derive their major tourist potential from: (a) an advantageous geographical position, situated as they are virtually in the centre of the Mediterranean; (b) their easy accessibility by air or sea from a vast European tourist market; (c) a very equable climate, with very warm summers and mild winters; (d) the attraction of the sea with the multifarious activities it provides; (e) the wealth of archaeological remains and; (f) their renowned history.

1. Value and Extent of the Tourist Industry

| | |
|-----------------------------------|---------|
| Number of tourist arrivals, 1966: | 72,889 |
| 1967: | 97,519 |
| 1968: | 136,995 |
| 1969: | 186,084 |

Mainly from United Kingdom, Italy, United States, Germany and Scandinavian countries. An appreciable number of visitors from Sweden has been registered during 1969.

| | |
|---|--------|
| Foreign exchange receipts from tourism, 1966: | £ 3.6m |
| 1967: | £ 4.9m |
| 1968: | £ 8.2m |
| 1969: | £11.2m |

| | |
|---|---------------|
| As a percentage of total foreign exchange earnings, 1966: | 9.1% |
| 1967: | 12.12% |
| 1968: | 16.7% |
| 1969: | not available |

2. Official Promotional Organisation

The Malta Government Tourist Board, under the jurisdiction of the Ministry of Education, Culture and Tourism, is the organization responsible for the promotion of tourism in Malta.

The main functions of the Board are to do all things necessary to encourage tourists to visit Malta and to investigate, formulate and carry out schemes, by means of advertising or otherwise, which are calculated to bring the attractions of Malta as a tourist resort to the notice of people in other countries.

Tourist development activities, previously falling under the competence of the Tourist Board, became the responsibility of the Malta Development Corporation with effect from 1st May, 1968. During 1969, the Corporation approved three hotel projects which will provide additional accommodation for 274 visitors.

Maltese diplomatic missions and consular representatives abroad co-operate with the Tourist Board in the diffusion of tourist information in their respective regions or areas.

Facilitation:

(a) Citizens of the Republic of Austria, Kingdom of Belgium, Republic of Cyprus, Kingdom of Denmark, French Republic, Federal Republic of Germany, Icelandic Republic, Ireland, Italian Republic, Grand Duchy of Luxembourg, Kingdom of the Netherlands, Kingdom of Norway, Kingdom of Sweden, Switzerland, Turkish Republic and United Kingdom of Great Britain and Northern Ireland require only a valid passport or a valid official identity card to enter Malta for a stay not exceeding three months.

(b) Citizens of the Commonwealth countries, Finland, the Libyan Republic, Liechtenstein, Monaco, Portugal, Spain, the United States of America, Uruguay and Vatican City require a valid passport for a stay not exceeding three months.

(c) For nationals of countries not included in (a) or (b) above a valid passport with visa is required. Requests for a visa should be addressed to the Maltese diplomatic missions abroad. However, for countries where there is no Maltese diplomatic representation, a request for visa should be made to the nearest Consulate of the United Kingdom.

Entry and departure formalities in Malta are very simple. It is the Tourist Board's policy, however, to continue to advise on the streamlining of procedures as suggested from time to time by the International Union of Official Travel Organisations (IUOTO).

3. Internal and Infrastructural Organization

Accommodation - During 1969, twelve new hotels, comprising 1,461 beds, were opened, bringing the total of hotel beds available at the end of 1969 to 7,562. Accommodation in serviced villas and flats is estimated at 6,000 beds. During 1969, the Malta tourism plant has been further augmented by the establishment of more restaurants, night-spots, sports centres and other entertainment facilities.

Resorts - Malta's Yachting Centre continued to increase in importance and size. The quays can now accommodate 320 yachts and basic facilities were improved, (see Section 5).

4. Government Participation

(i) Ownership or shares in hotels:

Nil

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

Grants were made by the Malta Government from funds provided by United Kingdom aid. These sums (to nearest thousand) were:

| | |
|-------|----------|
| 1965: | £306,000 |
| 1966: | £557,000 |
| 1967: | £650,000 |
| 1968: | £650,000 |
| 1969: | £600,000 |

Grants are awarded as follows:

- (a) For hotels with over 300 beds at 33 1/3% on capital investment costs or £580 per bed whichever is the lower.
- (b) For hotels under 300 beds at 20% of construction costs including fixed equipment or £350 per bed whichever is the lower.
- (c) The minimum size of hotel for which grants are made is 40 double rooms.

In addition, duty-free importation of construction material, equipment and hotel furnishings is permitted.

A sum of £64,995 (in interest-free loans) was also made available during 1968/69 to encourage existing hotels to face-lift their establishments.

Government-owned land, previously offered at non-commercial rates for tourist resort projects, is now offered for development on the basis of open competition.

- (iii) Income tax and other concessions on hotel income:

A tax holiday for the first ten years of operation is granted to hotel concerns by the Maltese Government.

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

Duty concessions, under the third schedule of the Import Duties Act, 1964, are designed to give as much opportunity as possible to restaurateurs and hoteliers to equip their establishments to modern standards and thus provide better services to visitors.

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

In 1969, £95,000 was made available by the Government to the Malta Tourist Board for advertising, publicity and promotion purposes.

- (vi) Government expenditure on infrastructure:

In 1969, a provision on £312,000 was made by the Government for the servicing and improvement of resort sites including water works, telephones, roads and sewers, electricity and gas.

5. Action Taken During Current Year

In consonance with the Tourist Board's policy to diversify the market, initial advertising campaigns were mounted in Germany and Scandinavia. Results achieved were encouraging. For the past ten years the main visitor supply source was the United Kingdom.

In anticipation of greater numbers of visitors from Germany and Scandinavia, the Tourist Board organised another four-month course for tourist guides proficient in the German and Scandinavian languages.

The Board has also intensified its activities towards establishing the Island as a convention venue, especially in the off-peak months.

With a view to strengthening the image of Malta as an ideal meeting place for conventions and important international events, the Tourist Board has sponsored two annual events, namely, the "International Malta Air Rally" and the "Middle Sea Race". This has also enhanced the number and variety of Malta's calendar of events.

Following the increase of off-season tourist traffic, steps were taken to initiate a beach cleaning scheme on a year-round basis.

An £8 million project, to be phased over five years, was launched in connexion with the development of Marsamxett Harbour as a yachting centre. When complete, the yachting centre complex will comprise berthing space for 1,800 yachts, a sailing school, boutiques, a recreation centre and two luxury hotels. This development project is being handled by the Manoel Island and Malta Marina Company Limited, a joint company in which the Malta Government holds 51 per cent of the equity shareholdings.

6. Future Plans for the Tourist Industry

The general and broad plans for the next five years are: (a) to continue to narrow the gap between peak and off-peak seasons with the main aim of making Malta an all-the-year-round destination area; (b) to diversify and broaden the scope of the 'product' Malta is currently offering; (c) to intensify the diversification of the tourist market.

With the above aims in view, it is envisaged that by 1974, the total bed availability will have reached the 15,000 mark and tourist arrivals in excess of 350,000 by the end of December during the same year. If these targets are realized, they will yield a gross foreign exchange income of £29 million (high forecast) or otherwise a minimum of £21 million (very low forecast).

Mauritius

The tourist potential of the island depends on its sub-tropical maritime climate, its lush vegetation and scenery, its mountains and crater lakes and the beaches, lagoons and coral reefs which surround the island. There are abundant facilities for swimming, sailing, deep-sea fishing and other aquatic sports.

1. Value and Extent of the Tourist Industry

Number of tourist arrivals,

1966: 13,040 (excluding intransit passengers)
1967: Not available

The majority of tourists come from the neighbouring islands of Reunion and Madagascar. The remainder come largely from South Africa and France. About 15% of the passengers come by air, the remaining 85% come by sea. They tend to spend their whole holiday in Mauritius.

Foreign exchange receipts from tourism,
from tourism, 1966: 10 m Rupees (provisional)
1967: Not available.

As a percentage of total foreign
foreign exchange receipts, 1966: 3.0% (Provisional)
1967: Not available

2. Official Promotional Organisation

The Mauritius Government Tourist Office was set up in January, 1959 with the purpose of developing the tourist potential of the island and expanding the tourist industry in the interest of economic development. The Office is answerable to the Ministry of Commerce and Industry. A Tourist Advisory Board, whose function is purely consultative, advises the Ministry and the General Manager of the Tourist Office on all matters connected with tourism.

The members of the board comprise representatives of air and ship shipping companies and of official and private organisations concerned with the tourist industry.

Within Mauritius, the Board makes use of press and broadcasting services to stimulate interest in the industry and to underline the industry's importance as a foreign exchange earner.

Overseas Representation - there is no external organisation, although Mauritius is a partner in the Alliance Touristique de L'Océan Indien, designed to promote the tourist industries of Mauritius, Reunion, Madagascar and the Comores Island. Its first meeting was held in May, 1966. The Government

* Information unrevised since June, 1968, as further information on Mauritius was not available at time of publication.

Tourist Office prepares printed pamphlets and booklets on tourist attractions for distribution at home and abroad. The office also promotes air tourism to the island by co-operating in joint publicity ventures with airlines, e.g. it has carried out joint publicity with both Qantas and Central African Airways. The Mauritius Commission in London also distributes tourist publicity and information material to potential tourists.

Facilitation - the Government Tourist Office provides facilities for visiting journalists and travel writers. Further action taken by the government to encourage the industry includes, the relaxation of controls on importation of Mauritius currency by visitors, and the abolition of written declaration of goods to Customs by passengers. Road Traffic Legislation was amended but allows visitors with International Driving Licences to drive on the island.

3. Internal and Infra-structural Organisation

Tourists stay at hotels and boarding houses. There are 624 hotel beds and private accommodation provides a further 200 beds (June, 1968). Progress in hotel development is being helped by the provision of loans through the Development Bank of Mauritius. A new hotel is being built at Le Morne Brabant (on the coast at the south west of the island) and plans are also being considered for new hotels at Curepipe and Port Louis. So far no training facilities are provided, but the services of a catering officer to train hotel staff will be sought under the Technical Assistance Scheme.

The inter-isle organisation known as the "Alliance Touristique de l'Océan Indien", referred to above, was established with a view to setting up a common programme so as to offer to visitors to this area a variety of tourist entertainment on widely different patterns by making full use of the varied attractions of the four islands.

Plaisance International Airport has been reinforced and recently extended to 8,500 feet to enable it to take modern jet aircraft. Extensions and improvements to the terminal building, to raise the level and scope of facilities, is also being undertaken. Mauritius is served by five major air services - BOAC, Air France, Qantas, South African Airways and Rhodesian Air Services.

Efforts have been made in the past few years to attract more tourists particularly by air, from the African mainland and Europe; e.g. there are growing popularity of package tours arranged by Central African Airways. There have also been visitors by chartered aircraft and this appears to be a promising means of providing cheaper travel which is currently a handicap due to the island's remoteness.

4. Government Participation

(i) Ownership or shares in hotels:

None.

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

The Government has shown considerable interest in the hotel industry by the provision of loans amounting to Rs. 1,400,000 from 1961 to 1963.

As from 1964, loan funds to industry have been channelled through the Development Bank of Mauritius which is now in course of investing up to Rs 6 million by way of loans and equity in hotel development.

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

None.

(iv) Import duty and other concessions on hotel and other tourist construction:

The government grants exemption from customs duty on hotel equipment for approved establishments.

(v) Provision of public funds for publicity purposes:

Government finances the Tourist Advisory Board which is responsible for promotional publicity. To boost promotional publicity in the field of tourism the sum of Rs 917,000 has been provided in the 1966-70 Public Section Development Programme.

(vi) Government expenditure on infra-structure:

The Government in carrying out its general development programme, has improved airport facilities, roads etc, all of which aid tourist development; it does not however provide infra-structure specifically for tourism.

5. Action Taken During the Current Year

Not available at time of publication.

6. Future Plans for the Industry

Not available at time of publication.

New Zealand

New Zealand's tourist potential depends largely on the variety of its scenic attractions. The mountains, glaciers, fiords, forests, snow fields and winter sports areas, hot springs and geysers of the thermal regions, beaches, the customs and entertainments of the Maori people, all combine with a temperate climate to provide New Zealand with a wide range of attractions.

1. Value and Extent of Tourist Industry

| | | | | | |
|--|-------|------------------------------------|---|---|---|
| Number of tourist arrivals, (other than cruise etc. ships' passengers) | 1966: | 105,114 (excl. intransit visitors) | | | |
| | 1967: | 115,736 | " | " | " |
| | 1968: | 126,329 | " | " | " |
| | 1969: | 140,753 | " | " | " |
| Foreign exchange receipts from tourism, (excluding fares) | 1966: | NZ \$14.5 million | | | |
| | 1967: | NZ \$15.3 million | | | |
| | 1968: | NZ \$19.9 million | | | |
| | 1969: | NZ \$23.8 million | | | |
| As a percentage of total foreign exchange earnings (current account) | 1966: | 1.6% | | | |
| | 1967: | 1.9% | | | |
| | 1968: | 1.8% | | | |
| | 1969: | 1.6% | | | |

(Tourism is the fifth largest source of overseas exchange earnings).

2. Official Promotional Organisation

Tourist and Publicity Department - consists of a Tourist Division and a Research and Development Division responsible to the Minister of Tourism, and a Publicity Division responsible to the Minister in Charge of Publicity. The Tourist Division has four branches:-

Travel Services - responsible for Tourist Bureaux at home and overseas.

Special Duties - which is concerned with planning, budgeting of tourist promotion and liaison with international tourist organisations.

Tourist Promotion - responsible for handling tourist advertising and promotional activities.

The Development and Research Division - carries out research and prepares statistics for the industry.

Travel Commissioners, of the Tourist Division of the Department, are located in Sydney, Melbourne and Brisbane, San Francisco, Los Angeles, New York and London. An Honorary Representative is located at

Durban, South Africa. Elsewhere abroad the Department is represented by the New Zealand diplomatic, consular and trade representatives.

The Publicity Division consists of four sections: -

Information Section - which provides editorial and public relations services for the Government and initiates and supplies New Zealand publicity for use within the country and overseas.

Overseas Information Section - prepares background and other material for distribution to Government posts and to news agencies overseas. Organised activities by New Zealanders overseas such as trade missions, exhibitions, etc., are supported, as are visiting publicists to New Zealand.

The National Publicity Studios - combine displays and material for a wide range of publications and exhibitions, fairs, etc.

The National Film Unit - makes films for tourist publicity purposes. These are distributed widely overseas.

3. Internal and Infra-structural Organisation

Tourist and Publicity Department -

This is the national tourist office of New Zealand. It maintains seven offices in New Zealand and seven abroad. The Department provides a complete travel agency service within New Zealand, undertakes tourist publicity and promotion abroad, maintains a Research and Development Division to assist the administration of the Government Loans and Guarantee Scheme for new hotels and also for the development of resorts, maintains the National Film Unit and the National Publicity Studios, maintains an Overseas Information Section, provides representation for New Zealand in official international tourist organisations and, as the National Tourist Office, co-operates with all elements of the tourist industry in New Zealand.

New Zealand Travel and Holidays Association - is a non-profit making organisation representing private travel interests in New Zealand. The Tourist and Publicity Department is represented on the Executive and Board of the Association.

The aims of the Association are: to greatly increase the number of overseas visitors to and through New Zealand; to assist in every way the improvement of tourist accommodation, catering, transport, entertainment and other amenities within New Zealand; to make the New Zealand public more conscious of the value of tourism; to foster among New Zealand residents the practice of travel and holidaying in New Zealand.

The Association acts as a co-ordinating body for the private sector of the tourist industry.

South Island Publicity Association - its interests include such matters as tourism, new industries, airports, immigration and national and civic development. Over the years, the Association has produced a considerable number of guide books for distribution within New Zealand and overseas.

New Zealand National Airways Corporation - is the State-owned domestic airline.

Tourist Hotel Corporation - is a State corporation which operates a chain of thirteen first-class hotels in major scenic areas. Government policy has been for the Corporation to provide high standards of tourist accommodation in those places where private enterprise finds investment least attractive.

4. Government Participation

(i) Ownership or shares in hotels:

see Tourist Hotel Corporation above.

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

The New Zealand Government is making available up to NZ\$7 million by way of loans and a further NZ\$10 million by way of guarantees, to assist in financing new hotels, motor-hotels and new extensions to existing accommodation. The scheme is designed to assist private enterprise to establish and/or develop accommodation of high standard with, where appropriate, associated amenities. The emphasis on the whole scheme is to provide suitable facilities to meet the overseas tourist trade.

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

Expenditure on certain overseas tourist promotion by non-Governmental organisations enjoys a tax incentive. Claims are allowable for expenditure on advertising overseas, the bringing of recognised travel agents to New Zealand, official trade or tourist missions and tourist market research overseas.

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

None.

(v) Provision of public funds for publicity purposes:

Allocation for the Tourist and Publicity Department was NZ\$4.6 million for the financial year 1966/67.

The Government subsidises the New Zealand Travel and Holidays Association on a \$1 for \$1 basis on all contributions received by it, up to the level of NZ\$20,000 in any one year.

(vi) Government expenditure on infra-structure:

The Tourist Accommodation Development Committee consisting of representatives of the Tourist and Publicity Department, Treasury and State Advances Corporation, considers applications and makes recommendations to the Government which has approved loans amounting to NZ\$3.4 million

and guarantees of NZ\$7.8 million from a total of NZ\$14 million made available for tourist hotel projects.

5. Action Taken During the Current Year

Not available at time of publication.

6. Future Plans for the Tourist Industry

Further development along established lines.

Nigeria

Nigeria's tourist potential rests on the wide variety of the traditional life of the country as well as scenic variety, sunshine, warm climate and wild game at Yankari. The North is the centre of some ancient cultures and at Lake Chad there is game hunting and fishing. The South has its share of ancient culture (Benin is 1000 years old) and the superlative bronze heads of life, with the traditional brass and carving at Benin.

1. Value and Extent of Tourist Industry

| | | |
|-----------------------------|-------|---------------|
| Number of tourist arrivals, | 1966: | 16,878 |
| | 1967: | not available |
| | 1968: | not available |

The drop of some 5,000 visitors between 1965 and 1966 was due to the circumstances prevailing in the country during that year. Visitors came mainly from other African countries.

| | | |
|---|-------|---------------|
| Foreign exchange receipts from tourism, | 1966: | £1.5 million |
| | 1967: | £1.3 million |
| | 1968: | not available |

| | | |
|---|-------|---------------|
| As a percentage of total foreign exchange earnings, | 1966: | 0.5% |
| | 1967: | 0.5% |
| | 1968: | not available |

2. Official Promotional Organisation

Nigerian Tourist Association under the jurisdiction of the Federal Ministry of Trade is the organisation concerned with tourism development in Nigeria. The Association is a non-profit making organisation structurally based on the lines of the British Government supported British Travel Association, which has helped the Association by advising on organisation.

(It should be noted that the following is a description of the functions which the Nigerian Tourist Association is intended and empowered to carry out, but current activity is limited by finance).

The functions of the Association include tourist promotion through publicity and advertising abroad; co-ordination of all tourist promotional and development activities official as well as private; stimulation of all national activities likely to contribute to tourism development; development of tourism programmes and policies; promotion of tourism consciousness amongst the people; encourage domestic, social and youth travel; carry out

* Information unrevised since June, 1968 as further information on Nigeria was not available at time of publication.

study and research in the field of tourism, including preparation of an inventory of the country's tourist potentials; elaboration and application of regulations governing the various sectors of tourism and representation and participation in the work of international and regional tourist organisations.

Publicity activities include the preparation and distribution of information literature; production of tourist publicity films; preparation and organisation of advertising programmes on press, radio media; participation in joint publicity campaigns in collaboration with the private sector of the tourist industry (e.g. carriers, hoteliers, tour operators) at both national and international levels and organises familiarisation trips for journalists etc., for promotional ends.

It provides up-to-date information on tourist facilities in Nigeria for international bodies such as the Alliance International de Tourism (AIT) and the World Touring and Automobile Association.

The Nigerian Tourist Association has not yet established offices or representatives overseas but co-operates fully with the Nigerian diplomatic and consular representatives abroad for distribution of tourist material at Embassies and High Commissions.

It represents Nigeria at international tourist conferences in the sole capacity as the national travel organisation.

The Association takes action with a view to abolish, relax and simplify entry and departure formalities; for example, it is now possible for British consuls in some European countries to issue visas to tourists for stays up to one month, without previous reference from the Federal Government of Nigeria. It takes action with the responsible authorities of Nigeria to encourage adherence to international conventions in favour of tourism and the application of their provisions; also promotes measures for the provision of services for tourists at entry point (e.g. information offices, money exchanges, duty free shops, etc.). It will not of itself be responsible for the development of any local amenities or attractions. It seeks to develop the flow of tourist inside and into Nigeria so that local investment in the development of tourist attractions and amenities is rewarded.

3. Internal and Infra-Structural Organisation

Nigerian Railway Corporation now co-operates with Nigerian Hotels Ltd., in order to enhance catering facilities offered by the company on railway and air services.

The Tourist Association establishes and runs regional tourist offices within the country and has established and financed other regional tourist offices in co-operation with other regional, provincial, municipal and local authorities. It supervises, controls and co-ordinates the activities of tourist association and clubs.

Resorts - apart from interests of the main cities of Kano, Lagos, Ibadan and Enugu, Nigeria has resorts at Jos in Northern Nigeria and at the Obudu cattle ranch. At Lake Chad there is game hunting and fishing, but no amenities are provided.

4. Government Participation

(i) Ownership or shares in hotels:

The Federal Government owns one of the major hotels in the Federal capital. In the regions, the majority of hotels are owned and managed by the various Regional Governments.

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

The former Regional Governments financed entirely such projects as the Yankari Game Reserve, the Obudu Cattle Ranch and all other forms of development to date including, of course, the catering resthouses. The total amount involved is not known.

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

The hotel industry is treated as a pioneer industry under the Industrial Development (Income Tax Relief) Ordinate.

(iv) Import duty concession on material and equipment for hotel construction:

The Association cannot grant exemptions from customs charges on equipment for the hotel and tourist industries. It can only press for action by the Customs and Excise authorities.

(v) Provision of public funds for publicity purposes:

Budget for total tourist expenditure in 1966/67 was £23,000.

(vi) Government expenditure on infra-structure:

The amount is considerable since infra-structure covers roads, services and communications which involve considerable expenditure. This is not directed specifically to tourism, but its value to tourism is obvious, as facilitating the flow of movement, ease of making necessary arrangements and providing essential services. Under the national development plans, a very high rate of spending is devoted to such services.

5. Action Taken During the Current Year

Not available at time of publication.

6. Future Plans for the Industry

Not available at time of publication.

Pakistan

Pakistan's tourist potential consists largely of its archaeological and historical sites and monuments, together with collections of ancient art in its museums, its historic cities, the variety of its scenic beauty etc., Khyber pass and hill-resorts of West Pakistan, its scenic beauties, forests and reserves of wild life of East Pakistan.

Pakistan has approved a twenty-year prospective Master Plan (1965-85) for the development of tourism in Pakistan.

1. Value and Extent of the Tourist Industry

| | |
|-----------------------------------|---------|
| Number of tourist arrivals, 1966: | 77,482 |
| 1967: | 89,441 |
| 1968: | 97,392 |
| 1969: | 111,153 |

(Note: the above figures do not include 1,399, 8,450, 6,288, and 12,091, Indian nationals in 1966, 1967, 1968, and 1969 respectively). Tourists came mainly from United Kingdom, United States of America, Afghanistan, Germany and Japan.

| | |
|---|-------------------|
| Foreign exchange receipts from tourism, 1966: | Rs. 102.9 Million |
| 1967: | Rs. 118.7 " |
| 1968: | Rs. 128.9 " |
| 1969: | Rs. 147.3 " |

| | |
|---|------|
| As a percentage of total foreign exchange receipts, 1966: | 3.6% |
| 1967: | 4.1% |
| 1968: | 4.3% |
| 1969: | 4.8% |

It is hoped that receipts from domestic and foreign tourism will total Rs. 520 million during the Third Plan period (1965-70).

2. Official Promotional Organisation

The Department of Tourism is the Government Department responsible for the promotion of tourism. Government have approved the formation of a Tourism Development Corporation as a public limited company, which will start functioning in March, 1970. Government's participation is to the tune of 25% of the Corporation's equity and capital.

In addition to this the Government will provide a loan of Rs. 20 million to the Corporation in order to enable it to start functioning effectively. The Corporation will undertake the following activities:

- a) Construction and running of hotels and restaurants;
- b) Improvement and running of Government-owned resthouses;
- c) Establishment of tour promotion agencies within the country and abroad;

- d) Establishment of handicraft and souvenir shops ;
- e) Provision of entertainment and recreational facilities at tourist spots ; and
- f) Establishment of Pakistan Centres abroad consisting of Pakistan restaurants, souvenir shops and tour promotion agencies etc.

The Department of Tourism would continue to exist as a separate entity to perform regulatory, promotional, controlling, supervisory and sponsoring functions related to the tourist industry and its infrastructure.

The functions of the Department of Tourism include promotion both at home and overseas until such time the PTDC comes into full existence to take over this function. At home, wing tourist offices are functioning at Lahore, Dacca, and Karachi. Under the jurisdiction of the wing tourist office, Lahore, Regional Tourist Offices at Rawalpindi and Peshawar and sub-Regional Tourist Offices at Gilgit, Swat, Abbottabad and Murree are functioning. The Wing Tourist Office, Karachi, has under its jurisdiction the sub-Regional Tourist Office at Quetta. The wing tourist office, Dacca, controls a Regional Tourist Office at Chittagong and sub-Regional Tourist Offices at Cox's Bazar, Kaptai, Sylhet and Khulna.

Planning and Research - The Department also carries out market research and field surveys to determine the potential of various tourist attractions and tourist areas, requirements of tourist facilities, installations and services, collection, tabulation and dissemination of tourist statistics ; preparation of feasibility studies in the light of the results achieved from research ; planning and systematic development of tourist infrastructure in the private sector as well as in the public sector ; maintenance of liaison with international organizations in the field of travel and tourism ; study of the tourist trends in the tourist market areas ; examination and appraisal of reports and recommendations of international conferences on tourism ; devising systems to persuade tourists to prolong their stay and spend more in the country ; planning for the creation of new tourist resorts and consolidation of existing tourist facilities ; planning for the promotion of domestic tourism, including youth travel etc.

Co-ordination - Constant co-ordination with central and provincial Government departments, semi-Government and autonomous agencies, local bodies and the private sector with a view to streamlining efforts aimed at promotion of tourism and development of the tourist plant.

Publicity and Representation Abroad - At present, the Department promotes tourism abroad through honorary and part-time overseas representatives, joint-tourist promotion offices established overseas in co-operation with commercial or private bodies from Pakistan and through its diplomatic and consular representatives abroad. This function will be taken over by the PTDC. The Department carries out promotion of tourism through the exploitation of all possible publicity media in order to project the tourist attractions of Pakistan into the international market and to induce potential clientele to come to Pakistan.

Facilitation - Relaxation of travel restrictions and frontier formalities to facilitate movement of foreign tourists to and within the country.

Training-Training of tourist guides, information and reception staff, personnel of tourist instalations such as hotels, travel agencies, night clubs etc.

Additional Responsibilities - In addition to the above functions which are the direct responsibility of the Department of Tourism as the official agency responsible for the promotion of tourism and planning for the development of the tourist plant in the country, the following functions are being performed by the Department, due to lack of interest on the part of private enterprise in tourist development projects. These functions will be transferred to the proposed Pakistan Tourism Development Corporation soon.

- a) Accommodation - Construction of tourist accommodation and establishment of tourist complexes in selected tourist areas and spots where private sector is shy but which have a potential for development.
- b) Transport - Provision of tourist transport including conducted sight-seeing tours in large cities and major areas of tourist attraction.
- c) Recreation - Provision of recreational facilities for the tourists such as sports activities, hunting, fishing, angling, boating and yachting, cultural presentations etc.
- d) Creation of New Tourist Attractions - Creation of new tourist attractions such as ski-resorts, hunting safaris, fairs and festivals etc.
- e) Promotional Activities - Undertaking promotional activities in the field of tourism such as organisation package tours for international and domestic tourist groups, participating in national and international fairs and exhibitions, inviting foreign travel writers, tour promoters and journalists to visit Pakistan.
- f) Tourist Services - Organizing an efficient guide service, reception machinery and other tourist services.
- g) Presentation of Historical and Archaeological Sites - Ensuring proper presentation of the historical and archaeological heritage of the country through beautification and proper maintenance of historical and archaeological sites, introduction of son-et-lumiere programmes, illuminations etc.

Pakistan belongs to such international agencies as IUOTO, South Asian Travel Commission, RCD (Regional Development for Co-operation) Committee, ECAFE and American Society of Travel Agents.

3. Internal and Infrastructural Organization

The names of associations and organizations representing the private sector along with their functions are given below:

- (i) Pakistan Hotels, Restaurants and Clubs Association main functions are listed at annexure "A".

- (ii) Pakistan Travel Agents Association's main functions are listed at annexure "B".
- (iii) There is no association of the airlines.
- (iv) There does not exist any legislation for controlling the activities of these associations but as registered institutions with the Government, some supervisory control is exercised by Government when the interest of the state is involved.

Hotels - Five thousand hotel beds were available in 1965. With the commissioning of Intercontinental hotels at Karachi (306 rooms), Dacca (306 rooms), Rawalpindi (200 rooms) and Lahore (200 rooms) as well as a few more first class hotels at Karachi, Lahore, Islamabad, Dacca and Chittagong, the de-luxe and first class hotel accommodation has increased to 9,318 rooms. With the setting up of the Pakistan Tourism Development Corporation, more tourist hotels would be built. It is proposed to classify the existing and proposed hotels into de-luxe, first and second categories.

Air-Line - Pakistan International Airlines, the national carrier, have opened routes linking Afghanistan, The Peoples Republic of China, the USSR, Italy, West Germany, Switzerland, France, UK, Turkey, the Lebanon, UAR, Iran, Iraq, Saudi Arabia, Kuwait, Nepal, Kenya, Doha, Thailand, Phillipines, Japan and Tirana (Albania) with Pakistan. PIA also operate a network of internal services in East and West Pakistan, linking almost all important cities, archaeological and historical sites and other tourist resorts.

The Master Plan envisages provision of Rs.17 million for improvement of transport facilities during the Third Plan period. Conducted sight-seeing tours organised by the Department of Tourism are in operation in Karachi, Lahore, Rawalpindi, Peshawar, Chittagong and Dacca where airconditioned coaches and mini-buses are used for the purpose. This work will be taken over by the PTDC soon. Tourist guide facilities are also available in these cities besides other cities, historical, archaeological and tourist spots. The Master Plan further envisages that Rs. 54 million will be spent for addition and improvement of restaurants, amusement parks, gardens, etc.

4. Government Participation

- (i) Ownership or shares in hotels:
Government does not have any ownership or shares in hotels. But the Government has built rest houses for providing accommodation facilities in places where private enterprise was shy to invest money.
- (ii) Financial assistance specifically available (e.g. loan and guarantees):
Government does not extend any financial assistance or loans to private organizations for the development of tourist infrastructure but, however, semi-Government financial organizations provide financial assistance to private organizations desirous of developing tourism infrastructure.
- (iii) Income tax and other concessions on hotel income:

With a view to encouraging the hotel industry, the Government of Pakistan has declared hotels as industrial undertakings for tax purposes and extended to new hotels, the benefits of the "tax-holiday" admissible to new industrial undertakings. It has been decided that hotels set-up in Pakistan on or after the 1st January, 1960 would qualify for the tax-holiday provided they fulfil the following conditions :-

- (a) The number of guest rooms is not to be less than 100 in the case of hotels in large cities like Karachi, Lahore, Dacca, Rawalpindi.
 - (b) Each guest room has an attached bath-room equipped with modern scientific fitting.
 - (c) The hotel is centrally heated and airconditioned.
 - (d) In correlation to residential capacity the hotel provides adequate public facilities such as a dining hall, lobby, bar, grill room, coffee shop, conference hall, drug store, etc., and where possible recreational facilities such as a swimming pool, film projection room etc.
 - (e) Each guest room is fitted with a telephone and if a telephone connection is not available each room has a call-bell.
- (iv) Import duty concession on material and equipment for hotel and other tourist construction:

The Government of Pakistan has introduced a scheme known as the Bonus Scheme for hotels for providing an incentive to the hotel industry in the country. The scheme will apply to the earnings of hotels on account of room rentals paid by foreign tourists. The hotels making such earnings shall be entitled to bonus entitlement vouchers of face value equivalent to 20% of the foreign exchange earning of the hotel establishment.

The bonus entitlement vouchers would hold good for the import of :

1. Building material.
2. Heavy mechanical equipment.
3. Electrical equipment, apparatus, instruments.
4. Kitchen and Restaurant requirements.
5. Laundry equipment (non domestic).
6. Special fittings.
7. Swimming pool equipment.
8. Communications and Transport.
9. Consumable stores.
10. National "Cash" Register Machine.

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

The Government provided Rs. 22.5 million for publicity and promotion during the Third Plan period.

(vi) Government expenditure on infra-structure:

Estimates of expenditure for the Third Plan period on development schemes include:

Hotels: Rs. 219 million

Transport: Rs. 17 million

Other Development Schemes (restaurants, amusements, souvenir shops, parks and gardens etc.)

Rs. 54 million

5. Future Plans for the Industry

The rationale of tourism development planning during the Fourth Plan (1970-75) will be guided by the following considerations:

- (i) Consolidation of the tourist facilities in the already established tour circuits in the country viz, Karachi, Lahore, Rawalpindi, Islamabad, Peshawar, Kaghan Valley, Swat, Gilgit in West Pakistan and Dacca, Kaptai, Rangamati, Cox's Bazar, Sunderbans, Sylhet etc., in East Pakistan.
- (ii) With a view to making up the short-fall due to meagre allocation in the Second and Third Plans as compared to the recommendations of the Master Plan, adequate priority needs be accorded to the tourism sector.
- (iii) Creating tourism consciousness within the country.
- (iv) Offering of incentives to the private sector for investment in the fields where neither the Department of Tourism nor the proposed PTDC are interested.
- (v) Investment of foreign capital in major commercial ventures requiring foreign exchange and advanced technical know-how.
- (vi) Investment by the Department of Tourism in places of tourist interest which do not have an immediate economic viability but which do possess considerable tourist potential for exploitation on a long-term basis.
- (vii) As in done in foreign countries like Austria, Germany, Spain, etc. domestic tourism, should be considered as a welfare activity of the Government, as through this avenue the people of one region in the country get to know the other regions and thereby the task of material integration can be made more easily.

Main objectives of the Fourth Plan:

- (i) To complete the major development works already undertaken by the Department which are being carried over from the Third Plan to the Fourth Plan.
- (ii) To develop additional facilities for accommodation in the tour circuits in Pakistan lying in the far flung areas.
- (iii) To augment the existing land and water transport

- in places where private investment is shy.
- (iv) To create "hospitality" and good -will attitudes within the country for foreign tourists.
 - (v) To promote youth tourism.
 - (vi) To cater for recreational facilities for foreign and domestic tourists, by way of exploiting the cultural heritage of the country and by modern methods, keeping in view the limited resources available in the public sector.
 - (vii) To conduct market research and surveys to determine the tourist demands and requirements vis-a-vis the supply.
 - (viii) To project the touristic image of Pakistan in the international tourist market areas with a view to attracting more clientele through the media of mass communication.
 - (ix) To improve and modernise, as far as possible, the projects already completed.
 - (x) To facilitate visits to Pakistan by foreign tourists through liberalizing frontier formalities, customs formalities etc. and by opening up potential tourist areas.

Projections of funds for the Fourth Plan :

The projections for receipts from tourist sector during the Fourth Five-year Plan (1970-75) stand at Rs 80 crores according to the Master Plan and investment in the public and private sectors at Rs 59 crores, the distribution between public and private sectors being Rs 17.50 crores, and Rs 41.50 crores respectively. However, in order to be pragmatic and considering the fact that the Department of Tourism will not invest in purely commercial ventures, a realistic approach to the funds requirements has been made.

Programme size and structure :

Keeping in view the recommendations of the various foreign experts and also the perspective financing plan pertaining to the Fourth Plan Period of the Master Plan, the financial requirement of the Department to achieve the objectives set out in the Fourth Plan, as stated above, would be quite substantial as compared to the Third Plan. This sector during the period from 1970-71 to 1974-75 must not only keep pace with the development in other sectors of the economy but also make good the shortfall of the Second and more particular that of the Third Plan periods. The activities in other sectors for the economy, on the average, are expected to be, in monetary terms, more than double in the Fourth Plan, compared to those of the Third Plan. Hence, the funds requirement of the tourism sector should be, at least, three times during the Fourth Plan as compared to the Third Plan allocation.

The break-through which has already been made, despite limited resources, must be accorded sufficient impetus to lead to a forceful take-off by infusing adequate energy into the sector through a manifold increase in the absorption of funds by this sector.

Keeping all these factors in view, it has been tentatively estimated that the fund requirements of this Department during the Fourth Plan period would be Rs 900 lakhs.

Sierra Leone

Sierra Leone's tourist potential depends on its pleasant beaches which extend along the 21 mile Freetown Peninsula; its deep-sea fishing at Shenge and Sherbro; its exotic mountain scenery from which Sierra Leone derived its name and the colourful costumes and dance forms of its people including the Sierra Leone National Dance Troupe.

1. Value and Extent of the Tourist Industry

Number of tourist arrivals, 1966 : 2,350
 1967 : not available

Mainly from the United States, United Kingdom, France and USSR.

Foreign exchange receipts from tourism,
 1966 : 0.9 million leones
 1967 : not available

As a percentage of total foreign exchange earnings,
 1966 : 1.4%
 1967 : not available

2. Official Promotional Organisation

The Sierra Leone Tourist Board, a statutory body was established recently to develop the tourist industry in Sierra Leone. Its members represent both the public and private sectors of the industry.

The functions of the Board are promotional and also to organise the tourist industry within the country. The Board has not yet established tourist offices abroad. At present, diplomatic and consular officials overseas represent Sierra Leone's tourist interests.

Facilitation - action is normally taken to facilitate entry and departure formalities. A tourist information office is available and also transit halls at entry points.

The Tourist Board is not yet a member of any international or regional tourist organisation.

3. Internal and Infra-structural Organisation

There are several private tour operators, e.g. Sierra Tours and Yasbeck Tourist Bureau, which organise tours around the coast and to the interior.

Hotels - The Hotels and Tourist Board, facilitates the construction of new hotels and the improvement of existing ones. At present (June, 1968) there are two first-class hotels in Sierra Leone, providing 250 beds and

* Information unrevised since June, 1968, as further information on Sierra Leone was not available at time of publication.

four second class hotels providing approximately 100 beds. The new hotel being built at Lungi International Airport is estimated to cost £64,000.

Airline - The national airline is Sierra Leone Airways, the aircraft of which are operated by British United Airways. The airline operates scheduled flights from London, from neighbouring countries as well as into the interior. There is an international airport at Lungi, 8 miles across the bay from Freetown, which is serviced by seven international airlines - British United Airways, Czechoslovakia, Nigerian Airways, Air France, Ghana Airways, Air Afrique and Middle East Airlines.

Resorts - Sierra Leone has resorts at Bunce Island, Turtle Islands, Juba Beach and Lumley Beach, all situated within reasonable distance from Freetown.

Sierra Leone has not yet developed any game reserves, but plans are being made for the creation of game reserves in the Koinadugu District which is 233 miles from the capital, Freetown. There are no national parks.

4. Government Participation

- (i) Ownership or shares in hotels:
The Government owns some hotels and also owns a percentage of shares in others.
- (ii) Financial assistance specifically available (e.g. loans and guarantees):
None.
- (iii) Income tax and other concessions on hotel income:
Government grants concessions on hotel income under the Development of Industries Act.
- (iv) Import duty concessions on material and equipment for hotel and other tourist construction:
Government offers import duty concessions under the Development of Industries Act.
- (v) Provision of public funds for publicity purposes:
The allocation granted specifically for promotion was Le. 20,000 (£10,000), in 1966.
- (vi) Government expenditure on infra-structure:
Besides the Government subsidy granted to hotels and to Government maintenance of the Sierra Leone National Dance Troupe, the Arts and Crafts Centre and Sierra Leone Museum, the Government has spent £1 million on further development of the Lungi Airport

5. Action Taken During the Current Year

Not available at time of publication.

6. Future Plans for the Industry

The Government plans to improve hotel facilities, especially outside Freetown and to improve transport and communication facilities, particularly the internal air services.

There are plans to develop Lumley Beach as a special tourist centre, including the creation of a cultural village and arts and crafts centre.

The Government also proposes to establish a Zoo and a game reserve.

Singapore

Singapore's tourist potential lies in its multi-cultural society, conveniently located on international air and sea, and regional land and rail routes, duty free shopping, sunshine and beautiful scenery.

1. Value and Extent of the Tourist Industry

During 1969, the number of visitors arrivals to Singapore reached a new high of 408,709. Excluding Malaysians, the figure would be 367,703 and this represents a 22.5% increase over the corresponding total of 300,244 of 1968.

2. Official Promotional Organisation

The national tourist organisation in Singapore is the Singapore Tourist Promotion Board, a statutory board which comes under the jurisdiction of the Ministry of Finance. It consists of a Chairman, a Deputy Chairman, a Director and seven members from both government and the private sector.

The Board's finances are obtained jointly from a government subvention and cess on tourist hotels, tourist food establishments and tourist public houses.

Functions of the Board include:

Overseas promotion - The Board has power to secure overseas publicity for the tourist attractions of Singapore.

Development of facilities and attractions - It is also empowered to engage in, assist or promote the improvement of Singapore as a holiday resort.

Relationship with private sector - The Board maintains close liaison with the private establishments in the tourist industry and has on its Board some members representing the private sector.

It is empowered to co-ordinate the activities of persons providing services for visitors to Singapore and to regulate, with the approval of the Minister, standards to be maintained by tourist enterprises.

The Tourist Promotion (Certification and Control of Guides) Regulations 1964 empowers the Board to control the tourist guides in Singapore.

The Board can also license any class or classes of tourist enterprises. It makes recommendations to the Ministry of Finance in the gazetting of tourist hotels, tourist food establishments and tourist public houses.

Relationship with the Government:- The Board is empowered to act as agent for the Government or, with the approval of the Government, for any person or body or organisation for the transaction of any business connected

with any tourist enterprise .

The Board can make recommendations to the Government in relation to any measures which may be taken with a view to increasing the number of visitors to Singapore .

Overseas promotion, advertising, public relations and information offices:- The Tourist Promotion Board evaluates potential attractions and determines the best way of promoting and projecting the tourist attractions of Singapore mainly through media advertising to Singapore's main tourist markets as well as through editorial publicity in international publications .

Promotion and publicity schemes are mounted overseas as and when the opportunity or need arises as at travel conventions , fairs and exhibitions e.g. participation in ASTA, PATA and World Expo '70.

The Board also maintains information offices in the USA, Australia and Japan to assist in its overseas promotion and projection of the Republic's tourist attractions .

3. Internal and Infra-structural Organisation

There are a number of associations connected with the tourist industry. The ones that the Board maintains constant contact with are (i) the Hotels and Restaurants Association; (ii) the Singapore Travel Agents Association which is an association of those travel agents accredited with IATA and/or recognised by the FEPC (Far East Passenger Conference); (iii) Singapore Tour Operators Association; (iv) The Singapore Tourist Association whose membership is drawn from hotels, restaurants, shops, airlines, shipping lines, travel agents and tour operators .

These associations complement the Board in its endeavour to promote the tourist attractions of Singapore . It is also through these associations that it exhorts the tourist servicing industry to raise their standards and provide better services .

4. Government Participation

(i) Ownership or shares in hotels:

The Government went into equity participation in some hotels either directly or through the Development Bank of Singapore .

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

The Development Bank of Singapore gave loans to selected hotel projects .

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

There is no tax holiday but the Government has granted concessional rates of property tax for selected hotel projects in certain designated areas in 1969. However from 1970, these concessional rates will be withdrawn .

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

Singapore is to a large extent a free port though a number of protective duties have recently been imposed to foster local industry.

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

This is already provided for in the Government's annual subvention to the Board.

- (vi) Government expenditure on infra-structure:

Government undertakes the cleaning and landscaping of the beach area, but in the encouragement of beach resort schemes, government will provide the necessary infra-structure in roads and public utilities.

5. Action Taken During the Current Year

- (i) In order to promote the tourist industry, the Tourist Promotion Board underwent a complete reorganisation which led to the establishment of the following four departments:

- (a) Administration.
- (b) Department of Marketing.
- (c) Department of Facilities.
- (d) Department of Research.

- (ii) A number of tourist hotels equipped with the most modern amenities were constructed. At the end of 1969 there were 61 gazetted hotels with 3,725 rooms available for the visitors to Singapore.
- (iii) An island-wide campaign to keep Singapore clean was launched. In conjunction with this, the Government has encouraged the planting of flora, plants and trees to turn the Republic into a "Garden City". The ultimate aim is to make Singapore Asia's cleanest and greenest city.
- (iv) A Handicraft and Design Competition was organised by the Tourist Promotion Board to discover the inherent local talent with the end-result aim of developing a souvenir industry there.
- (v) A number of shopping arcades and emporiums have been opened and modernised to improve the image of Singapore as a "Shopper's Paradise".

- (vi) Tourist Attraction Markers were installed at the popular public places of interest to denote the Board's recognition of them as tourist spots.
- (vii) A Japanese Language Guide Course was organised in early 1969. The 6th Tourist Guide Course in English commenced at the end of the year.
- (viii) On the initiative and guidance of the Board, a private company providing multi-racial cultural shows was formed to add to the tourist attractions available in Singapore.
- (ix) The Board acted as co-ordinator in the erection of the Singapore Pavilion at the Japan World's Exposition 1970 and its Director was elected as Commissioner-General to the Exposition as well as Chairman of the Singapore Expo 1970 Committee.
- (x) The special evaluation study entitled "Demand and Supply of Hotel Rooms in Singapore, 1970-75" was produced by the Board's Department of Research.
- (xi) The Board participated in the following conferences and conventions with the aim of publicising and promoting Singapore's tourism.
 - (a) the 18th PATA Annual Conference held in Bangkok, January, 27th-31st 1969;
 - (b) the AFTA Convention held in Surfers' Paradise, Queensland July 8th-10th, 1969;
 - (c) the ASTA Convention held in Tokyo, September 14th-20th, 1969. At this convention, the Board mounted an Art Exhibition displaying works of well-known Singapore artists, staged a Singapore "Jet Sell" Fashion Show and hosted a Hospitality Suite.

6. Future Plans for the Industry

Future plans are mainly for the improvement and development of facilities and attractions.

With a view to improving facilities in Singapore, the Board is giving encouragement to hotel development and also providing the guide lines for such development i.e. type of development, total number of rooms required and, areas for development. In this connection, the Board has published a book "Demand and Supply of Hotel Rooms in Singapore 1970-75".

Government's assistance to the hotel and catering industry has been in the establishment of a Hotel Catering and Training Centre. Everything possible is done to ensure that accommodation of a high standard is readily available. Many of these hotels will be equipped with the most modern facilities calculated to satisfy the needs of the most sophisticated international traveller.

As for the development of attractions, the Government is encouraging the development of beach resorts and tourist attractions such as restaurants with unusual features and entertainment complexes. Other projects include the development of the offshore islands, hill resorts, temples, bird parks, a zoo, marineland, gardens, cultural shows and a handicraft industry.

Swaziland

Swaziland's tourist potential lies in its proximity to South Africa and Mozambique, its scenic beauty, and its generally equable climate, ranging from the near-tropical to the near-temperate.

1. Value and Extent of the Tourist Industry

No recent figures are available for the number of arrivals or foreign exchange receipts; Swaziland is in customs union with South Africa, and is in the Rand currency area. The great majority of tourists are from South Africa and Mozambique.

2. Official Promotional Organisation

There is no body as such in Swaziland itself, but a tourist information service was opened on 1 January, 1967 in the Swazi Air Offices in Johannesburg, the cost of which is partly borne by the Government. The industry comes within the portfolio of the Deputy Prime Minister.

3. Internal and Infra-structural Organisation

Hotels number about 20; they are privately owned.

Swazi Air, in association with South African Airways, operates a twice weekly service (Mondays and Fridays) from Johannesburg-Matsapa-Durban and return. Flight times are one hour and one and a half hours respectively. Swazi Air, in association with D.E.T.A., also operates a twice weekly service from Matsapa to Lourenco Marques and return on Saturdays and Mondays. There are good road communications between Swaziland and the Republic; Mbabane, the Capital, is about 240 miles from Johannesburg and about 135 miles from Lourenco Marques.

4. Government Participation

(i) Ownership or shares in hotels:

None

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

Not available at present.

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

Special income tax concessions were granted to the Casino opened in 1966 in conjunction with the Royal Swazi Hotel and Spa Luxury Hotel. There is provision for a minimum annual levy of 40% of net profits, rising to 50% after six years of operation.

*Information unrevised since June, 1968, as further information on Swaziland not available at time of publication.

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

Not available at present.

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

The tourist information service was allocated R 1,900 (£950) in 1967/68; previously, the annual provision had been R 500 (£250).

- (vi) Government expenditure on infra-structure:

In recent years there has been substantial investment in communications and services, including a large programme of road construction and improvements, the development of Matsapa Airport, and the improvement and expansion of water and electricity supplies.

5. Action Taken During the Current Year

Not available at time of publication.

6. Future Plans for the Tourist Industry

The tourist industry in Swaziland is in its infancy, and has considerable potential for expansion in the next few years.

Tanzania

Tanzania presents a total tourist product comprising a tropical location with extensive seaboard and interior, a diversity of tourist magnets, comprehensive modern plant, international air communication with the major generating centres and a good domestic air network. The touristic attractions include the finest concentration of wildlife in the world; big game hunting safaris under licence in the controlled areas and the reserves; Mount Kilimanjaro, at 19,340 ft. the highest mountain in Africa; the prehistoric site of Oldupai Gorge, home of "Nutcracker Man" (*Zinjanthropus Boisei*) 1,750,000 years old; the Island of Zanzibar; big game fishing; Bagamoyo, one-time infamous slave-port; Kilwa Kisiwani and other historic sites and ruins along the coast; miles of uncrowded sands; the scenic grandeur of Lake Victoria and Lake Tanganyika; the Usambara Mountains, reminiscent of the Swiss Alps, but without the snow; a healthy climate and the absence of winter; the music, dancing and other cultural skills of a friendly people comprising more than 100 tribes.

1. Value and Extent of the Tourist Industry

| | |
|---|--|
| Number of tourist arrivals, | 1966 : 31,860 1967 : 35,000 1968 : 40,000 1969 : 46,000 (estimated) |
| Foreign exchange receipts from tourism, | 1967 : £4,500,000 1968 : not available 1969 : not available |
| As a percentage of total foreign exchange earnings, | 1967 : 3.3% 1968 : not available 1969 : not available |
| Total hotel bed-nights in 1969, | 480,000 (provisional) |

2. Official Tourist Organisation

During 1969, the tourist industry underwent a major reorganisation. The Tanzania National Tourist Board, thus renamed on March 22, 1967, in succession to the Tanganyika National Tourist Board, established by Act of Parliament on July 11, 1962, was dissolved.

The Ministry of Information and Tourism, which hitherto had been principally concerned with the formulation of policy, now also undertook responsibility for the development and growth of the industry, administration, marketing, promotion, public relations, research, licensing etc.

During the year, the Tanzania Tourist Corporation was established by Act of Parliament to provide the requisite machinery for the planning, financing, expansion and operation of the hotels and tourist transport sector. These functions include Government participation and the encouragement of private investment.

This reorganisation, which indicates the increasing importance Government attaches to the proper development of the tourist industry, has resulted in the strengthening of the Tourist Division of the Ministry under a Director of Tourism, who is responsible to the Minister through his Chief Executive, the Principal Secretary.

On the Island of Zanzibar, comprehensive tourist services are provided by the Tanzania Tourist Friendship Bureau, with which a close and efficient liaison is maintained. The Bureau handles transport, tours, hotel accommodation and ancillary facilities. Immigration formalities have been streamlined, and tourists may now enter Zanzibar with the same visitors' pass or visa as that issued for the mainland.

In addition to maintaining a Tourist Office to assist visitors arriving in Dar es Salaam, the Ministry also has offices in five other centres in the principal tourist circuits, serving visitors, tour operators and the local travel trade generally, and assisting in internal public relations.

An office is also operated in neighbouring Nairobi, with the principal purpose of facilitating the traffic flow that exists on an East African basis.

Promotion and marketing etc., in the main generating centres in Europe, Scandinavia and North America is carried out through the Ministry's offices in London and Frankfurt, with the Director of Overseas Public Relations based in London for this purpose.

3. Internal and Infrastructural Organisation

Two tourist circuits, the Northern and the Coastal (Eastern) at present dominate the scene in that order. The Northern is notable for possessing world-famous wildlife locations such as the Serengeti and Ngorongoro, together with Mount Kilimanjaro, while the Coastal circuit, now coming into its own with the construction of the country's first beach resorts and hotels, offers a combination of beach, fishing and wildlife holidays. Meanwhile, the Government intends to develop additional circuits, each with individual attractions and characteristics, in due course.

The circuits include metalled and all-weather roads. Apart from road transport provided by operators for inclusive tour traffic, with trained driver/guides, car hire is also available. Petrol can be obtained at all wildlife lodges.

There is a comprehensive domestic air network with Comet, Fokker-Friendship, DC3 and Twin-Otter equipment, and also air charter.

Rail services link Tanzania with neighbouring Kenya and Uganda, and the capital with Lake Victoria, but while sleeping cars and restaurant cars are available, this mode of transport is somewhat slow. Steamer services are operated on Lakes Victoria and Tanganyika. There is also a long-distance motor coach service.

Hotels and Lodges - By the end of 1969, measured progress had been achieved in the development of tourist accommodation. A number of new hotels and lodges of international standard in design, construction, facilities, decor and furnishing, all enjoying spectacular settings, came into operation during the year. These included the first lodge to be constructed in the

Mikumi National Park, 180 miles from Dar es Salaam; a second lodge on the rim of the Ngorongoro Crater; a small hotel at Usa River; and the Africana Vacation Village, a large and attractive beach resort just north of Dar es Salaam, which includes a marina and an animal sanctuary among its holiday attractions. A fine modern wing was added to the New Africa Hotel which is being completely rebuilt in Dar es Salaam, and extensions were added to the Lake Manyara Hotel.

During 1970, two new lodges, each enjoying unique settings, will become operational in the Serengeti National Park. The Lobo Wildlife Lodge, built into the contours of a great rock promontory, will open with 150 beds, while the Ikoma Fort Lodge, constructed within the ruins of an old German fort, will offer 120 beds. Also due to be operational in 1970 is the Bahari Beach Hotel, near Dar es Salaam, reminiscent of an African village (150 beds), while another the Kunduchi Beach Hotel, is also under construction, together with a 150-bed hotel in a coral cove on Zanzibar Island, and a Fishing Lodge on Mafia Island.

Projected accommodation includes a large hotel near Arusha to serve the new airport, a lodge on the slopes of Mt. Meru in the Arusha National Park, a small lodge in the Selous Game Reserve, a Club Mediterranee near Dar es Salaam, and hotels at Mwanza on Lake Victoria; at Tanga, the country's second port; at Bagamoyo, the old slave port, and at Kilwa, in an historic area south of the capital.

Finance - It is Government policy that the Tanzania Tourist Corporation should hold not less than 50 per cent of the shares of lodges or hotels sited in the National Parks, in which Government has a special obligation towards the conservation of wildlife, one of the country's natural resources. In all other hotel development, the field is open to the private sector to develop independently, or in partnership with the TTC as preferred, provided this conforms to Government's overall plan and building reaches a required standard.

Hotel Statistics - the production of hotel occupancy statistics is compulsory under the terms of the Statistics (Tourist and Hotel Industry Regulation, 1966). Hoteliers are required to return information monthly to the Central Statistical Bureau.

A 2/- levy per person is imposed under the Hotel Accommodation (Imposition of Levy) Act, 1962, on hotels with five or more bedrooms and charging 7/50 or more per night.

Tourist Season - The tourist season extends from July to March, with April, May and June being the off-season months. The seasonal traffic mainly affects the wildlife lodges. The peak month, August, sees more than six times as many visitors as the trough month of May.

Tourist Standard Beds Available in 1969 (including hotels, beach resorts, wildlife lodges and camps)

| <u>Coastal Circuit</u> | <u>Northern Circuit</u> | <u>Other Centres</u> | <u>Total</u> |
|------------------------|-------------------------|----------------------|--------------|
| 1,186 | 1,031 | 387 | 2,604 |

Tourist standard beds under construction in 1970

| <u>Coastal Circuit</u> | <u>Under Construction</u> |
|--------------------------------------|---------------------------|
| Africana Holiday Village (extension) | 200 |
| Bahari Beach Hotel | 200 |
| Kunduchi Beach Hotel | 200 |
| Mikumi Wildlife Lodge (extension) | 50 |
| Mafia Island Fishing Lodge | 60 |
| New Africa Hotel (reconstruction) | 140 |
| Zanzibar Beach Hotel | 150 |
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| Bagamoyo | 50 |
| Club Mediterranee, Dar es Salaam | 450 |
| Hilton Hotel, Dar es Salaam | 440 |
| Mtangata Hotel, Tanga | 60 |
| Tanga Hotel, Tanga | 100 |
| Mbwamaji, Dar es Salaam | 400 |
| New Africa Hotel (extension) | 210 |
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National Parks, Game Reserves and Controlled Areas:- The Tanzania National Parks is a parastatal organisation operating under the Ministry of Information and Tourism, and is administered by a Board of Trustees with the Director as the chief executive.

There are at present seven National Parks, extending over some 12,000 square miles, in which the wildlife is fully protected and where no human habitation is permitted. In addition, there is the Ngorongoro Crater.

Tanzania, with its enlightened policy of wildlife conservation, also maintains some ten game Reserves extending over 35,000 square miles. These are closed to the general public, apart from Government-approved hunting safaris operated under licence. There are also about 40 Controlled Areas where the hunting of game is controlled by a quota system. It is estimated that visitors shoot about 1,500 animals in a year, producing substantial revenue. Both licences for hunting and National Park entrance fees go towards meeting the cost of maintaining the animal sanctuaries and combating the menace of poaching.

Airlines:- Sixteen airlines operate direct services to Tanzania. These are: Aeroflot Soviet Airlines, Air Comores, Air Congo, Air France, Alitalia, British Overseas Airways Corporation, East African Airways, Ethiopian Airlines, KLM Royal Dutch Airlines, Lufthansa, Pan-American World Airways, Sabena Belgian World Airlines, Swissair, Trans-World Airlines, United Arab Airlines and Zambia Airways.

East African Airways, the national carrier, also operates a comprehensive scheduled service within Tanzania.

4. Government Participation

(i) Ownership or shares in hotels:

The Tanzania Tourist Corporation owns a number of hotels and lodges in whole or in part.

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

The Tanganyika Development Finance Company Ltd. (TDFL) and Industrial Promotion Services (T) Ltd., (IPS) can provide both loan and equity for tourist projects.

The Foreign Investments (Protection) Act, 1963, makes provision for the holder of a certificate issued in respect of an approved enterprise to transfer out of Tanzania in the approved foreign currency and at the prevailing official rate of exchange,

- (a) the profits, after taxation, of his investment of foreign assets;
- (b) the approved proportion of the net proceeds of sale of all or any part of the approved enterprise, either in liquidation or as a going concern;

- (c) the principal and interest of any loan specified in the certificate.
- (iii) Income tax and other concessions on hotel income:
Investment allowances comprise fiscal incentives, personal and capital allowances, annual depreciation, and refund of customs duties for certain approved industries.

Capital allowances consist of the following:-

- (a) 40% on power-drive ships of more than 495 tons gross.
- (b) 20% on industrial buildings and purchase and installation of machinery therein.
- (c) 20% on approved hotel projects.

Annual depreciation varies from 4% on industrial buildings to 37½% on plant and machinery such as tractors.

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

Not available at time of publication.

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

Not available at time of publication.

- (vi) Government expenditure on tourist facilities and amenities:

The Tanzania Tourist Corporation, a parastatal body, which apart from borrowed funds, relies mainly on its own income from investment for financing its operations.

The TTC works in close co-operation with the Ministry of Information and Tourism.

5. Action Taken During the Current Year

During 1969, a further step in the rationalisation of the tourist industry was the introduction of legislation providing for the licensing of travel agents. The Tanzania Tourist Agents (Licensing) Act, which became operative on March 1, 1969, covers travel agents, tour operators or any other person who, for reward, undertakes to provide for tourists and other members of the public in relation to tours and travel within or outside Tanzania, transport, accommodation, professional services on tourism and other travel matters.

More than 100 licences of various categories have been issued to companies operating within Tanzania.

The introduction of this legislation resulted in a marked improvement in the extent and quality of services offered by local companies providing tour-operating arrangements etc.

An Hotel Training School was established at the beginning of 1969 to provide a training programme for the many personnel required to operate the hotels now being developed.

The Tanzania Tourist Corporation, established by Order of the President under Government Notice No.91 published on April 11, 1969, assumed responsibilities for the hotel planning, development, investment and administration of the public sector from the National Development Corporation. The Chief Executive is the General Manager.

6. Future Plans for the Industry

Tanzania's second Five Year Plan for Economic and Social Development, 1969-1974, envisages a progressive increase in tourist inflow so that the 100,000 figure is reached by 1974*.

To this end, the Plan quotes a number of communications projects that will serve tourism development in addition to transport. These include the new road linking Tanzania and Zambia, the recently-completed all-metalled road joining Dar es Salaam (coastal tourist circuit) with Moshi and Arusha (northern tourist circuit), and a proposed new road from Arusha to Mwanza on Lake Victoria, and the new Kilimanjaro International Airport now under construction in the north.

The Kilimanjaro International Airport is scheduled to become operational at the end of 1971. It will be capable of accommodating super jets.

Meanwhile, a feasibility study now under way will define the second phase of hotel and wildlife lodge development in various parts of the country. This will cover the next ten-year period.

While every endeavour is to be made to ensure the provision of a soundly-based tourist plant catering for various income groups, no ribbon development will be permitted, and Government intends that the expansion of tourist facilities shall not be at the expense of social or cultural considerations, nor to the detriment of natural resources, particularly the wildlife and the scenery. Thus will the quality of the tourist product be maintained, and the character of the country and people preserved.

The national travel authority, the Ministry of Information and Tourism, is being strengthened so as to play an increasingly effective part in the development of the industry as a whole, with the full support and co-operation of the population.

* 1969 - 46,000 (provisional)

Trinidad and Tobago

The tourist potential of Trinidad and Tobago lies in its accessibility to both North and South America, on its tropical climate, beaches, the scenic beauty of its mountains and plantation areas, annual carnivals and other religious festivals, fauna and flora, unique multi-racial society as well as its calypso, steelband and limbo, all of which had their origins here.

1. Value and Extent of the Tourist Industry

| | | |
|-----------------------------|-----------|---------|
| Number of tourist arrivals, | 1966: | |
| | Visitors | 66,190 |
| | Intransit | 22,730 |
| | Temporary | 147,170 |
| | 1967: | |
| | Visitors | 77,790 |
| Intransit | 24,980 | |
| Temporary | 127,390 | |

Mainly from North America, Commonwealth Caribbean, Central and South America and Europe.

| | | |
|---|-------|-----------------|
| Foreign exchange receipts from tourism, | 1965: | \$21 million TT |
| | 1966: | \$25 million TT |
| | 1967: | \$31 million TT |

As a percentage of total foreign exchange earnings,

| | |
|-------|----------------|
| 1965: | 2.4 approx. |
| 1966: | 2.4 approx. |
| 1967: | not available. |

2. Official Promotional Organisation

Trinidad and Tobago Tourist Board, a statutory authority under the jurisdiction of the Ministry of Industry and Commerce, is responsible for tourist promotion, both local and overseas. The Board maintains and finances a local tourist office in Port of Spain and co-operates with the private sector in promotional and development programmes.

The Board also maintains overseas offices at New York and Toronto and co-operates with the diplomatic and consular representatives of the High Commission in London for distribution of tourist information and material.

Publicity Visits - Several photographic groups, travel writers and freelance journalists received the Board's co-operation during their visits in 1967. In many cases specific information was prepared for illustrating articles in newspapers and magazines.

* Information unrevised since June, 1968, as further information not available at time of publication.

Familiarization Tours - There were also eleven (11) familiarization tours by overseas travel agents made in 1967.

The Board represents Trinidad and Tobago at International and tourist conferences and is a member of American Society of Travel Agents and IUOTO.

3. Internal and Infra-structural Organisation

Hotels - At the present time, there are approximately 16 new hotel projects - comprising 1657 rooms - contemplated for construction in Trinidad and Tobago within the next four years (1969-1972).

| | | | |
|------------|----------|---|---------------------------------------|
| Breakdown: | Trinidad | - | 909 rooms (eight (8) projects) |
| | Tobago | - | <u>748</u> rooms (eight (8) projects) |
| | | | 1657 rooms (sixteen (16) projects) |

The estimated capital expenditure involved totals \$55,448,000 TT.

Hotel loans are made available for new construction or for the extension of existing facilities. With respect to new construction, the general policy is not to lend more than 50% of the value of the project; a first mortgage on the land and building is accepted as security. With respect to extension of existing facilities, the policy is not to lend more than 60% of the value of the project; a first mortgage on the land and building being accepted as security.

Industrial Development Corporation is concerned with industrial development in particular, but also assists the tourist industry by its efforts in the development of the hotel industry. The Corporation administers a Hotel Loans Fund to which the Government allocated \$200,000 in 1967 and a Hotel Investment Fund to which the Government allocated \$450,000 in 1967.

There are several associations representing the different sectors of the industry, e.g. hotel and restaurants, airlines, shipping companies, taxi owners, entertainments industry and travel agents. However, most of these interests are represented on the Tourist Board.

Trinidad Chamber of Commerce is active in promoting tourism both domestically and overseas and is concerned with improving tourist facilities within Trinidad and Tobago.

4. Government Participation

(i) Ownership or shares in hotels:

All hotels are privately owned, except for the Hilton in which the Government holds shares through the Corporation.

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

See - Hotel Loans Fund and Hotel Investment Fund above.

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

The Hotel Development Act allows income tax exemption for a period of 10 years in respect of profits accruing from the hotel.

An accelerated depreciation of depreciable equipment owned by the hotel operator and used in the hotel, at a rate of 20% per annum.

A capital allowance in respect of approved capital expenditure incurred by the hotel operator in erecting or improving the hotel, at a rate of 20% of the approved capital expenditure in each of any 5 years of the 8 years initially following the tax exemption period.

In addition to tax exemption in respect of dividends distributed to share-holders, tax exemption is granted in respect of interest on an approved loan used for an approved hotel purpose.

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

The same Act gives five years and up to ten years exemption from duty on imports of building materials and other equipment to the hotel industry.

(v) Provision of public funds for publicity purposes:

Budget allocations to the Tourist Board were:-

| | |
|---------|------------------------------|
| | \$1,088,805 in 1966 and |
| | \$1,935,717 in 1967 |
| of this | \$ 475,003 in 1966, and |
| | \$ 400,000 in 1967 was spent |

on advertising, while a further \$334,230 in 1966 and \$263,775 in 1967 was spent on overseas representation.

(vi) Government expenditure on infra-structure:

In addition to money made available for Hilton Hotel, the Government has provided loans to hoteliers through the Hotel Loans Fund and Hotel Investment Fund (see Infra-structural Organisation). The Government has also constructed many roads in Trinidad and Tobago to make beaches, sites for hotels, restaurants and other facilities more accessible.

Expansion of electricity and water resources have been connected to these areas. The Government also provides liberal incentives. The Government owns the British West Indian Airways. A new air terminal building has been constructed and runways have been improved.

5. Action Taken During the Current Year
Not available at time of publication.
6. Future Plans for the Tourist Industry
Not available at time of publication.

Uganda

Uganda's tourist potential lies in its reserves of wild-life, its national park areas, and the scenic beauty of the Murchison and Karuma Fall areas, of Mt. Elgon, Lake Albert and the Upper Nile, the Mountains of the Moon and the lakelands and forests of the Kigezi district. Mountaineering, traditional dancing, hunting and crater-lakes are some of the attractions of these areas. There are also hot-springs which arrest the attention of tourists.

1. Value and Extent of the Tourist Industry

| | |
|-----------------------------|--------------|
| Number of tourist arrivals, | 1966: 24,021 |
| | 1967: 38,000 |

Mainly from Congo, Rwanda and Burundi; United Kingdom; United States, other African countries and Europe.

Note - There was a notable recovery in the number of tourists to Uganda in 1966 compared to 1965, when the Western Region was closed to visitors during the first half of the year.

| | |
|---|------------------|
| Foreign exchange receipts from tourism, | 1966: £1,773,088 |
| | 1967: £3,700,000 |

| | |
|---|---------------------|
| As a percentage of total foreign exchange earnings, | 1966: 2.5% |
| | 1967: not available |

2. Official Promotional Organisation

Department of Tourism under the jurisdiction of the Ministry of Information, Broadcasting and Tourism is responsible for the development of the tourist industry in Uganda.

The Department promotes tourism both in Uganda and overseas through Uganda Embassies which help in the distribution of brochures and other literature on tourism.

In London the Tourist Office deals with the promotion of the industry both in the United Kingdom, Republic of Ireland and the neighbouring European countries. Another office is also available in New York.

In addition, Uganda has organised familiarisation trips for groups of travel agents, journalists and writers, for example, in 1965, a team of 8 agents of Scandinavian Air Service from Norway, Sweden and Finland, and in 1966 writers of the Nova Magazine from the United Kingdom visited Uganda with a view to promoting tourism between Uganda and other countries.

* Information unrevised since June, 1968, as further information on Uganda was not available at time of publication.

Uganda has also taken part in the International Trade Fair and Exhibition shows in France, Germany and Italy where it won a Gold Medal. Further arrangements were made for Uganda to attend a similar show in Canada during 1967.

The Department as the national tourist organisation represents Uganda at regional and international tourist conferences.

Finally a commission of inquiry known as the Maxwell Stamp Associates were appointed to report and make recommendations on tourism and their report has been approved by the Uganda Government.

3. Internal and Infra-Structural Organisation

Uganda Tourist Association - consists of members from the private sector of the industry.

Uganda Development Corporation - was incorporated in 1952 with authorised capital of £8 million of which over £6 million has since been wholly issued by the Government of Uganda. The Corporation, designed to assist in strengthening and broadening the economic life of Uganda, plays an important part in the development of the tourist industry e.g. it has completed a chain of over ten hotels strategically placed for tourists and arrangements are being made for the Corporation to take over all the Rest Houses which are exclusively owned by the Government at the moment.

National Parks: Uganda has three National Parks, Queen Elizabeth National Park, Murchison Falls and the Kidepo Valley National Park.

The World Wildlife Fund helped the Uganda Government in the transfer of 5 White Rhino - the world's rare surviving ones from West Madi to Murchison Falls Park.

Game Reserves: Uganda has thirteen game reserves placed in various parts of the country.

Sanctuaries: So far there are altogether nine sanctuaries in different parts of Uganda. Settlement is allowed within the sanctuaries but the right to hunt is restricted.

4. Government Participation

(i) Ownership or shares in hotels:

See Uganda Development Corporation (above), the Government holds shares in Uganda Hotels.

(ii) Financial assistance specifically available (e.g. loans and guarantees): Not available at time of publication.

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

Some concessions are made, but precise figures are not yet available.

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

None.

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

Not available at time of publication.

- (vi) Government expenditure on infra-structure:

Safari lodges have been built by Uganda Development Corporation in Murchison Falls and there are also similar facilities at Entebbe, Jinja, Tororo, Mbale, Gulu, Masindi, Kasese, Queen Elizabeth National Park, Kabale, Masake and Rest Houses in other districts.

Uganda Government intends to invest £5 million for the development of national parks in the next five years.

5. Action Taken During the Current Year

Not available at time of publication.

6. Future Plans for the Tourist Industry

As a result of the Maxwell Stamp Associates report, the Government has passed "The Tourist Board Act, 1968" which will have the responsibility of making investigations, securing formulation and carrying out the projects for developing the tourist industry. The following figures illustrate the aims of the Government:-

| Year | Projected No. of Tourists | Projected (estimate) gross foreign exchange revenue. |
|------|---------------------------|--|
| 1969 | 43,200 | £3,240,000 |
| 1970 | 54,000 | £4,050,000 |
| 1971 | 67,500 | £5,062,000 |

The existing accommodation will be doubled at a total estimated cost of £1,005,000. The Government aims at improving the infra-structure by tarmacing most of the roads to the areas frequented by tourists.

There will be established Information Bureaux at Entebbe Airport and other specified places, immigration formalities will be reduced to a minimum. The implementation of the future plan is estimated to cost the country a capital investment to the value of £2.1 million and an annual expenditure of £1.6 million.

Zambia

Zambia's tourist potential depends on the natural phenomenon of the Victoria Falls (the main tourist area), its reserves of wild-life and as a result of being a land-locked country, it may expect to receive a number of intransit visitors, who could be attracted to spend longer periods in Zambia.

1. Value and Extent of the Tourist Industry

| | | |
|-----------------------------|-------|----------------|
| Number of tourist arrivals, | 1966: | 127,000 (est.) |
| | 1967: | not available |

Mainly from Africa, United Kingdom and Europe. The volume of the tourist traffic was decreased by UDI and the number of tourists from Rhodesia and South Africa fell sharply. However, as a result of promotional activities overseas, some of the loss has been made good by an increase in visitors from United Kingdom, Europe and United States of America.

Foreign exchange receipts from tourism,

| | |
|-------|--|
| 1966: | £2.1 million (includes "other transportation") |
| 1967: | £2.3 million (includes "other transportation") |

As a percentage of total foreign exchange earnings,

| | |
|-------|--|
| 1966: | 0.9% (includes "other transportation") |
| 1967: | 0.9% (includes "other transportation") |

2. Official Promotional Organisation

The Zambian National Tourist Bureau under the Ministry of National Resources & Tourism, is responsible for the development of tourism in Zambia.

The functions of the Bureau include:
 tourist promotion through advertising abroad; co-ordination of all tourist promotional and development activities, official as well as private; stimulation of all national activities likely to contribute to the development of tourism; development of tourist programmes and policies; improvement and extension of tourist attractions and facilities in Zambia; encouragement of domestic and social tourism; study and research in field of tourism, including preparation of an inventory of Zambia's tourist potential; elaboration and application of regulations governing the various sectors of tourism and representation and participation in the work of international organisations.

* Information largely unrevised since June, 1968, as further detailed information was not available at time of publication.

In the field of publicity the Bureau distributes information literature including the brochure "Zambia in the Sun", produces documentary films, participates in fairs and exhibitions and other national or international events, prepares and organises programmes in press, radio and television and measures the effectiveness of various publicity media; participates in joint publicity and advertising campaigns in collaboration with the private sector of the industry (carriers, hoteliers, tour operators).

It also organises familiarisation tours. In 1965, the Bureau organised the visit of travel agents from Scandinavia, Germany and the United States. These tours were curtailed in 1966 because of the petrol shortage but were significantly developed in 1967 with further visits of journalists and travel writers. Other visits including some from the United Kingdom, were arranged in 1968.

Overseas Representation - the Bureau has offices in New York and Los Angeles, which it operates through a Public Relations firm, and a new office was opened in London, in December 1967. Until then the Bureau was represented in London by a special section which was set up specifically for the purpose in a firm of Public Relations consultants. This arrangement eventually outlived its usefulness, and a separate office with bureau identification was negotiated. The London representative covered Europe as well as the United Kingdom, but the growth of work in this area, made it impossible for this system to continue satisfactorily and accordingly plans for a branch office in Frankfurt were approved by the Zambian authorities.

The Bureau represents Zambia at international travel and tourist conferences in the sole capacity as the national tourist organisation. Zambia is a member of IUOTO and the American Society of Travel Agents.

Facilitation - The Bureau engages in activities with a view to the abolition, relaxation and simplification of entry and departure formalities e.g. tourist visas for 30 days are obtainable without prior application at the port of entry; it acts with responsible authorities of Zambia to encourage adherence to international conventions in favour of tourism and the application of their provisions and also promotes measures to provide services for tourists at entry points (e.g. information offices, money-exchanges, duty free shops etc.)

3. Internal and Infra-Structural Organisation

In the 1965 Annual Report of Minister of Commerce and Industry, it was stated that Zambia's airline and hotel capacity were already overstrained and the tourist industry could only be expanded when these were built up. However, the necessary infra-structure is now being adequately enlarged.

Hotels Board under the Chairmanship of Director of Tourism is responsible for ensuring that hotel standards are maintained. It carries out annual inspections and has introduced a classification system.

Negotiations have been carried out by the Ministry of Commerce and Industry and the Industrial Development Corporation for construction of new hotels at Lusaka and Victoria Falls.

The Government has built a new international airport at Lusaka. This airport which cost over £6 million is 13,000 feet in length and can accommodate any type of aircraft.

4. Government Participation

(i) Ownership or shares in hotels:

The Government is in the process of setting up an Hotel Development Corporation which will assume the responsibility for the construction of new hotels and the expansion of existing ones. Wherever possible, private enterprise will be encouraged to own, build and operate the hotels but where this does not happen the Government is prepared through the Hotel Development Corporation to go ahead either on its own or in partnership with private enterprise. A feasibility survey is at present being carried out to ascertain the desirability of appointing an international organisation to supervise the operation of Government-owned hotels and game park lodges.

The Intercontinental Hotels which are at present under construction in Lusaka and at the Victoria Falls are examples of joint financial participation between the Government and Pan American World Airways.

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

The Hotel Development Corporation will grant loans and guarantees for construction and expansion of hotels. An amount of £115,000 has been reserved in the plan for this purpose. The Government has also entered into vast financial participation in the construction of hotels, as in the case of the Intercontinental Hotels between the Government and Pan American World Airways.

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

Under a recent amendment to the Income Tax Law hotels of a certain standard can, upon the recommendation of the Hotel Board, be classified as industrial buildings and become eligible for rebate on tax.

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

None.

(v) Provision of public funds for publicity purposes:

In 1966/67 \$291,559 was allocated to tourism.

(vi) Government expenditure on infra-structure:

The Government has spent £6 million on the new international airport at Lusaka and is committed to the expenditure of over £2 million on the new Inter-continental Hotels. Over £ $\frac{1}{2}$ million has already been spent on opening game reserves to visitors and there has been considerable expenditure on the road system which links the various parts of Zambia. Holiday resorts have been developed on Lake Kariba and others are planned for Samfya on Lake Bangweulu. Both closed and open air museums have been situated at Livingstone.

The sum of £69,000 has been provided in the Four-Year Plan for development projects to be carried out by the National Tourist Bureau itself. In addition, the sum of £1 million has been included in the Plan to enable new lodges to be constructed in the National Parks, and viewing roads and other tourist amenities to be constructed there. A further sum of £220,000 has been provided for the development of the Mosi-oa-Tunya National Park.

5. Action Taken During the Current Year

Four new lodges, constructed by the Game Department at a cost of over £200,000 each, with new air strips to be sited adjacent to two of these lodges were to be completed in time for the 1969 game park season.

6. Future Plans for the Industry

The amenities at the Falls will be developed to the maximum that the available funds will bear and efforts will be made to increase its passenger services wherever the demand justifies this.