

## SUMMARY

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

### 1. National Tourist Offices

Of the thirty-one Commonwealth countries covered in this study, sixteen countries have established statutory authorities expressly to deal with tourist development and promotion. In some cases, these are virtually Government Departments as the Boards or Corporations are often subject to the general and special directives of a Minister in charge of tourism. The sixteen countries, which have established statutory tourist organisations are - Australia, Barbados, Britain, Ceylon, Cyprus, Ghana, Guyana, Jamaica, Kenya, Lesotho, Malta, Sierra Leone, Singapore, Tanzania, Trinidad and Tobago and Uganda. In addition, in Britain, Guyana and Tanzania, certain Government Departments are also concerned with the administration of tourist development.

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

Ten other Commonwealth countries, namely, Canada, Fiji, India, Malawi, Malaysia, Mauritius, New Zealand, Pakistan, Tonga and Zambia have established Government Departments responsible for administering the tourist industry. (In the case of Canada this is a special section in a Government Department). In addition, a number of these countries, boards or special councils, representing both the private and public sectors of the industry have been set up to act in an advisory capacity; such is the case in Canada, Fiji, India, Malawi and Mauritius.

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

In Western Samoa, the Department of Economic Affairs, while not established exclusively to deal with tourism, is responsible for all aspects of economic growth, including tourism.

Botswana and Swaziland are the only countries, which have not (as far as it can be established from the available information), set up national tourist offices, although it is known that both Governments are considering doing so. Nevertheless, Government Departments administering related sectors, e.g. Department of Information and Wild Life, presently deal with some aspects of tourist development.

### 2. Overseas Representation

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

While tourist information can be acquired from the Commonwealth diplomatic and consular missions abroad, many Commonwealth countries have established specific agencies for promoting their tourist industries overseas. For example, sixteen countries - Australia, Barbados, Britain, Canada, Ceylon, Fiji, India, Jamaica, Kenya, Malaysia, New Zealand, Singapore, Tanzania, Trinidad and Tobago, Uganda and Zambia - have established offices in other countries specifically for tourist promotion; and while many of these countries also promote tourism by co-operating with their national airlines or commercial organisations abroad, the remaining fifteen countries - Botswana, Cyprus, The Gambia, Ghana, Guyana, Lesotho, Malawi, Malta, Mauritius, Nigeria, Pakistan, Sierra Leone, Swaziland, Tonga and Western Samoa appear to rely solely on the use of diplomatic and commercial channels for promoting tourism abroad, at this stage.

3. Internal and Infrastructural Organisation

Not comparable.

4. Government Participation

(i) Ownership or shares in hotels:

The Governments of twenty-three Commonwealth countries own hotels or have shares in hotels, motels or rest-houses. In the cases of Ceylon, Ghana, India, Kenya, New Zealand, Nigeria (Regional Governments), Sierra Leone, Tanzania, Uganda, Zambia and Western Samoa, this is on a relatively significant scale; while in Australia, Barbados, Botswana, Britain, Canada, Cyprus, Guyana, Jamaica, Malaysia, Singapore, Tonga, and Trinidad and Tobago, the Governments have small to very minor interests in hotels.

All hotels are privately owned in Fiji, The Gambia, Lesotho, Malawi, Malta, Mauritius, Pakistan and Swaziland.

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

The Governments of twenty-three countries, namely, Australia (State Governments only), Barbados, Botswana, Britain, Canada, Ceylon, Cyprus, Fiji, Ghana, India, Jamaica, Kenya, Malawi, Malta, Mauritius, New Zealand, Nigeria, Singapore, Tanzania, Trinidad and Tobago, Uganda, Zambia and Western Samoa - offer some financial assistance to the industry, mainly for hotel development; however, amounts vary widely between this group of countries.

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

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

The remaining eight countries - Australia, Canada, The Gambia, Ghana, Lesotho, Mauritius, New Zealand and Singapore do not grant such concessions.

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

Almost half the Commonwealth Governments (fourteen) grant duty concessions on material or equipment for the construction of, and facilities for, new hotels or expansion to existing hotels. These Governments are - Barbados, Ceylon, Cyprus, The Gambia, Guyana, Jamaica, Malawi, Malta, Mauritius, Pakistan, Sierra Leone, Tanzania, Tonga and Western Samoa. Singapore being a duty-free port does not need to offer such concessions.

(v) Provision of public funds for publicity purposes:

All countries with established national tourist offices receive some Government funds for promotional or publicity purposes. However, there was insufficient information on the two remaining countries, Ghana and Guyana, to determine whether money was made available by their Governments for this purpose.

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

1. National Tourist Offices

Of these nineteen States and Territories, four have set up Government Departments responsible for tourist development. These are the Bahamas, Bermuda, Gibraltar and the Seychelles. (The Bahamas has also established a Tourist Board to act in an advisory capacity). Thirteen countries - Antigua, British Honduras, British Solomon Islands, British Virgin Islands, Cayman Islands, Dominica, Grenada, Hong Kong, Montserrat, St. Kitts-Nevis-Anguilla, St. Lucia, St. Vincent and the Turks and Caicos Islands have established statutory authorities to look after their tourist interests. In the New Hebrides, the Chamber of Commerce is responsible for tourism, and receives official assistance for this purpose. The Gilbert and Ellice Islands have not as yet established any official tourist organisation, although tourist information can be obtained through the Colony's Information Services.

2. Overseas Representation

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

3. Internal and Infrastructural Organisation

Not comparable.

#### 4. Government Participation

(i) Ownership or shares in hotels;

In St. Kitts-Nevis-Anguilla, the Government has a major interest in hotel development, while in Antigua, Dominica and the Gilbert and Ellice Islands the Governments have minor interests in hotels. In all other States and Territories all hotels are privately owned.

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

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

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

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

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

Fifteen of the nineteen States and Territories offer duty concessions; they are Antigua, Bahamas, British Honduras, British Virgin Islands, Cayman Islands, Dominica, the Gilbert and Ellice Islands, Grenada, Montserrat, the New Hebrides, St. Kitts-Nevis-Anguilla, St. Lucia, St. Vincent, the Seychelles and the Turks and Caicos Islands.

(v) Provision of public funds for publicity purposes:

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