

EVALUATION SERIES No.77

**Development of a
Strategic Framework for the
Commonwealth Secretariat to
Support the Tourism Sector**

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ABBREVIATIONS

| | |
|--------|--|
| ASEAN | Association of SouthEast Asian Nations |
| AusAID | Australian Government Overseas Aid Program |
| BWIA | BWIA West Indies Airways |
| CBC | Commonwealth Business Council |
| CCGE | Commonwealth Consultative Group on Environment |
| CDC | Commonwealth Development Corporation |
| CFTC | Commonwealth Fund for Technical Cooperation |
| CIDA | Canadian International Development Agency |
| CPII | Commonwealth Private Investment Initiative |
| CTC | Commonwealth Tourism Centre |
| CTO | Caribbean Tourism Organisation |
| EAD | Economic Affairs Division |
| EU | European Union |
| FDI | Foreign Direct Investment |
| GDP | Gross Domestic Product |
| GIDD | Governance and Institutional Development Division |
| GTZ | Gesellschaft für Technische Zusammenarbeit |
| IRR | Internal Rate of Return |
| LDCs | Least Developed Countries |
| LIAT | LIAT The Caribbean Airline |
| MDGs | Millennium Development Goals |
| NEPAD | New Partnership for Africa's Development |
| OAS | Organization of American States |
| OECD | Organisation for Economic Co-operation and Development |
| OPEC | Organization of the Petroleum Exporting Countries |
| PIF | Performance Information Framework |
| POC | Point of Contact |
| RETOSA | Regional Tourism Organisation for Southern Africa |
| SADC | Southern African Development Community |
| SASD | Special Advisory Services Division |
| SIDS | Small Island Developing States |
| SMEs | Small-to-medium sized enterprises |
| SPED | Strategy Planning and Evaluation Division |
| ST-EP | Sustainable Tourism – Elimination of Poverty |
| UNCTAD | United Nations Conference on Trade and Development |
| USAID | United States Agency for International Development |
| WB | World Bank |
| WSSD | World Summit on Sustainable Development |
| WTO | World Tourism Organization |
| WTTC | World Travel & Tourism Council |

EXECUTIVE SUMMARY

Introduction

The Commonwealth Secretariat has been involved in supporting tourism in member countries for over two decades. Through technical assistance provided by the Commonwealth Fund for Technical Co-operation (CFTC), the Secretariat has supported projects among member countries and regional organisations in the Caribbean, Southern Africa and Oceania. In this context, a study was deemed necessary to review previous and existing interventions in the tourism sector and to advance a strategic framework for future interventions by the Commonwealth Secretariat in the sector. The specific terms of reference for the study were as follows:

- Review the documentation prepared under the original evaluation study and, drawing on interviews and additional document analysis, identify some of the relevant design and performance aspects of the Secretariat's programmes in the sector;
- Conduct brief field visits to the Caribbean and Southern African regions to update information on the sector and, drawing on material collected during the evaluation identify lessons and best practice for the Secretariat from its past performance;
- In the light of international developments in tourism, particularly economic and social issues that affect the sector in small states, identify the key areas and priorities which will have a bearing on development in the sector;
- Provide suggestions for the development of a coherent and dynamic sector strategy or action plan for the Secretariat in the sector, including discussion of the critical elements for a tourism strategy. This should take into account other donor activity in the sector and the specific value of Secretariat support and comparative advantage.
- Recommend the most effective modalities for delivery of Secretariat assistance and an appropriate monitoring framework, including comments on relevant performance indicators for measuring the efficiency and effectiveness of future interventions in tourism.

Contextual Background

For many countries within the Commonwealth, tourism is almost universally the leader in economic growth, foreign exchange, investment and job creation. Such is the dominance of tourism in many economies that one of the principal challenges for the future is to reduce the dependency of many economies on tourism as their driver of economic growth. For example, the Caribbean (33% of GDP) and Oceania (13% of GDP) have significant proportions of their economy in the travel and tourism sector. For many of the Commonwealth's small island states dependency on tourism is even more considerable. For example, Antigua's economy is 82% dependent on tourism while the Maldives, Seychelles and Bahamas are 74%, 57% and 56% dependent respectively. With regard to Oceania, the economy of Vanuatu is 52% dependent on tourism while Kiribati and Fiji are 28% and 27% dependent respectively. It is thus clear that although tourism does not represent a panacea for economic growth, for many countries within the Commonwealth it remains the principal driver.

The Commonwealth Secretariat and Tourism

As the primary intergovernmental organisation within the Commonwealth Association, the Commonwealth Secretariat is in pole position to take an active lead in the development of tourism across member countries and seek solutions to develop economies in a sustainable manner. The sustainable development of tourism and the alleviation of poverty in the countries of the Commonwealth represent a central tenet in wider economic and social development across all countries of the Commonwealth and are integral to the Commonwealth Strategic Plan 04/05 – 07/08. To date, the principal delivery vehicle for tourism interventions within the Secretariat has been the Commonwealth Fund for Technical Co-operation (CFTC).

Based on current and pipeline demand the Special Advisory Services Division (SASD), the division within the Secretariat that holds strategic responsibility for tourism, plans to concentrate future interventions on:

- Tourism Master Plans
- Tourism Marketing Strategies
- Tourism Marketing Plans
- Tourism Human Resource Plans

Projects are primarily demand-driven (bottom-up) with SASD working within the wider context of international development, Millennium Development Goals (MDGs) and the wider Commonwealth. Project selection criteria vary depending on their anticipated impact, relation to wider Commonwealth objectives, and experience within the Secretariat to complete the project professionally and to a high standard. The principal drivers for SASD in undertaking interventions in tourism are twofold: one to assist member states in capacity building and to enhance their sector competitiveness; and two, for the interventions to meet trade objectives internal to SASD.

Based on a thorough evaluation of previous interventions in tourism by the Secretariat, a number of issues were identified for further consideration. Issues identified included aspects of project initiation and design, project performance, project monitoring and evaluation, project ‘best practice’, constraints and impediments, and sustainability, gender and small states. Based on the findings under each of these headings and interviews conducted internally and externally to the Secretariat, the Secretariat is deemed to have a comparative advantage in tourism interventions in that it is considered to:

- Be truly international in its outlook while demonstrating excellent ‘broad’ local knowledge;
- Be credible, reliable, independent and ‘politically’ neutral;
- Be generally responsive to innovative ‘demand-led’ projects (despite reservations about transparency about the application process);
- Have had a long-term involvement in the domain of tourism and hence ought to contain significant accumulated knowledge;
- Demonstrate considerable affinity and trust with its member states;
- Be a credible catalyst for the raising of additional financial resources from other international donor agencies;
- Serve as a vehicle to shared-funding opportunities and further collaboration;
- Offer good quality, cost effective technical assistance;

- Be flexible with a suitably quick speed of response with regard to the allocation of funds;
- Understand the culture of recipient governments and organisations;
- Have the ability to conduct effective institutional strengthening due to its close working relations with tourist organisations around the Commonwealth.

With regard to suitable modalities of delivery the view from all those interviewed both internally and externally to the Secretariat was that the CFTC has worked well in the past and that it was a formula that was understood and accepted. It is widely acknowledged however that although considered to be a relatively cost-effective means of delivering technical assistance, far greater communication is required to inform member governments and tourism organisations as to where the priorities of SASD lie.

Issues for the Future Development of Tourism

In light of international developments in tourism a number of issues were identified as significant in helping to shape the future development of the sector. Issues identified include the need to reduce the economic dependence of many countries on tourism, managing disasters and accommodating climate change, economic globalisation, the need for continued product development and market diversification, and more efficient and effective marketing and branding. Other issues include the need to reduce economic leakage, enhance host population perceptions of the industry, the need to increase levels of local ownership, and the need to improve service quality. Among all those issues identified as impacting on the future development of tourism the Secretariat is advised to:

- Continue to encourage the development of tourism although for those countries with already high levels of dependency encourage them to seek more sustainable, local solutions and levels of ownership. At the same time they should be encouraged to seek alternative sources of economic development;
- Encourage destinations with mature markets (such as the Caribbean and parts of Oceania) to seek new markets (intra-Commonwealth travel) and identify new product development opportunities;
- Develop/maintain regular dialogue with the financial services sector, host communities, and local and regional media outlets, to communicate more robustly the economic benefits to be derived from tourism;
- Stress the importance of ‘quality’ data to recipients of funding as a means to underpin effective decision making and as a condition upon receipt of future technical assistance;
- Revisit existing institutional structures (locally and regionally) and review their appropriateness for implementing the master plans, marketing strategies and human resource plans delivered via technical assistance.

Clearly the identification of the issues is the easier task with the implementation of suitable strategies to address them the key challenge.

Strategic Priorities and Actions

In view of the considered comparative advantage of the Secretariat in its interventions in the tourism sector, and its acknowledged constraints of resources

and funding, ten strategic priorities are identified as requiring attention if the Secretariat wishes to remain an effective, focussed international provider of technical assistance in the domain of tourism. This study concludes that the four areas of identified expertise within SASD are worthy of continuation, namely the development of: Tourism Master Plans; Tourism Marketing Strategies and Plans, and Tourism Human Resource Plans. However, to maximise the Secretariat's overall effectiveness it is recommended that the following ten strategic priorities are adhered to. In order of priority, the Secretariat is advised to:

- Continue with interventions in the tourism industry;
- Maintain strategic focus and funding;
- Develop a proactive and network-driven orientation;
- Develop more effective corporate communication;
- Seek collaboration funding and partnership working;
- Develop a culture of organisational openness;
- Develop a balance between regional and bilateral assistance;
- Enhance levels of local consultation in the setting of objectives and choice of experienced consultants;
- Integrate monitoring and evaluation fully into projects;
- Further commit to education and training.

Conclusion

Underpinning all of the aforementioned strategic priorities is the need for the Secretariat to foster a more open culture which encourages the cross-fertilisation of ideas. To date, there appears a paucity of systems by which existing and new staff are able to learn from previous interventions in tourism. The interconnected nature of tourism serves as a catalyst for a team with considerable breadth of experience as at the same time requiring a holistic overview of the sector. As such tourism expertise should be shared within and across divisions when the need arises in an open and constructive working environment. Finally, and with regard to monitoring, the Secretariat is advised to develop a set of procedures to monitor the performance of external experts when undertaking funded projects. Where internal expertise is unavailable the appointment of senior academic/industry specialists is advised with feedback and all communication to be channelled through a nodal point of contact within SASD. A permanent 'independent' panel of experts is recommended to oversee interventions funded by the Secretariat.

1.0 INTRODUCTION

1.1 Study rationale

The Commonwealth Secretariat has been involved in supporting tourism in member countries for over two decades with approximately 80 projects of varying lengths completed since the early 1980s. In this context, a study was conducted in 2003 to assess the impact and effectiveness of the Secretariat's interventions in tourism and to recommend future directions for the Secretariat in this sector. The study specifically reviewed the assistance provided through the Commonwealth Fund for Technical Co-operation (CFTC) in the tourism sector for the six-year period 1995/96 – 2000/01 and sought to establish the extent to which objectives set had been met and whether the results were considered to be sustainable and visible. The study undertook a detailed desk review of the projects and fieldwork was conducted in a number of countries. However, the study was never completed and no overall analysis, findings or recommendations arose from the study. Despite this, interventions in the tourism sector are likely to continue to review priority in the forward programme, particularly for small states and for countries in the Caribbean and Southern African regions.

1.2 Terms of reference

In view of the above, this study was initiated to:

- Review the documentation prepared under the original evaluation study and, drawing on interviews and additional document analysis, identify some of the relevant design and performance aspects of the Secretariat's programmes in the sector;
- Conduct brief field visits to the Caribbean and Southern African regions to update information on the sector and, drawing on material collected during the evaluation identify lessons and best practice for the Secretariat from its past performance;
- In the light of international developments in tourism, particularly economic and social issues that affect the sector in small states, identify the key areas and priorities which will have a bearing on development in the sector;
- Provide suggestions for the development of a coherent and dynamic sector strategy or action plan for the Secretariat in the sector, including discussion of the critical elements for a tourism strategy. This should take into account other donor activity in the sector and the specific value of Secretariat support and comparative advantage.
- Recommend the most effective modalities for delivery of Secretariat assistance and an appropriate monitoring framework, including comments on relevant performance indicators for measuring the efficiency and effectiveness of future interventions in tourism.

1.3 Methodology

This study incorporates a full review of all previous audit materials, correspondence and research notes. This includes a re-review of all surveys, questionnaires and correspondence between parties conducted as part of the original evaluation study. It also includes the review of a number of secondary materials and reports published and provided by the Commonwealth Secretariat. A full list of sources and publications used for the purpose of this study can be seen in Section 7.

To build on the availability of secondary data, a number of face-to-face interviews were conducted with Secretariat staff in the four divisions with an interest in tourism – Governance and Institutional Development Division (GIDD), Economic Affairs Division (EAD), Special Advisory Services Division (SASD) and Strategy Planning & Evaluation Division (SPED). Face-to-face interviews were also conducted with regional stakeholders and previous beneficiaries of Secretariat assistance in the Caribbean and Southern Africa with site visits conducted to Barbados and Johannesburg/Pretoria. In addition, telephone interviews were conducted with a sample of international donor agencies and tourism-related bodies to identify the nature and scope of existing relationships with the Commonwealth Secretariat and to identify instances where the Secretariat may already possess or be able to develop a particular comparative advantage. All interviews were conducted in May and June 2005 with a compendium of all interviews undertaken to be found in Section 7.

In addition to the above it is acknowledged that staff within SASD participated in an internal ‘brainstorming’ session in June where a number of issues were raised similar to those documented throughout this study. Although the author of this study was not party to the session it is acknowledged that SASD were being internally rigorous in questioning existing practices and were accepting that in places there was some room for improvement.

1.4 Outline of the report

The report begins by introducing the contextual background for the study. Section 2 is divided into three distinct but connected parts. The first part introduces tourism as an agent for change while the second part introduces some pertinent global and regional tourism trends. Section 2 concludes with a brief introduction into the role played by tourism within the Commonwealth. Section 3 is more specific in that it explores the role played by the Commonwealth Secretariat in the tourism sector. The first part identifies the linkages between tourism and the Commonwealth Strategic Plan 04/05 – 07/08 and the Millennium Development Goals (MDGs) while parts two and three explore relationships internal to the Secretariat and other institutional donor interventions in tourism. Section 3 continues with a thorough evaluation of previous interventions in the tourism sector by the Secretariat, a review of external perceptions of the Secretariat which synthesises all viewpoints and proposes those areas in which the Secretariat is considered to have a comparative advantage vis-à-vis interventions in the tourism sector. Section 3 concludes with a review of the modalities of delivery of Secretariat assistance and recent meetings held by Commonwealth Tourism Ministers. Section 4 is more forward looking in that it provides an extensive overview of issues for the future development of tourism, both generic and specific to the Secretariat. Thereafter, Section 5 identifies a number of strategic priorities and actions for the

Secretariat for its future interventions in tourism with ten identified priority action points. Section 5 concludes with a brief summary of some additional strategic issues and a discussion on performance monitoring and the role of the Secretariat. Section 6 offers a conclusion and a summary of recommendations while Sections 7 and 8 highlight the key publications and organisational contacts that contributed to this study and three appendices respectively.

2.0 CONTEXTUAL BACKGROUND

2.1 Tourism as an agent for change

Tourism is a network industry in that it represents a complex system of individual components that ‘collectively’ constitute the tourism product. Transport, accommodation, attractions and amenities, the destination, intermediaries and destination-marketing organisations all come together in the delivery of tourism and serve collectively as a catalyst for economic and social development. The interconnected nature of tourism ensures that any decision relating to tourism has multiple impacts for multiple stakeholders.

Tourism earnings as a share of all services back in 2000 escalated from 28.1% for OECD (Organisation for Economic Co-operation and Development) countries to 70.6% for least developed countries (LDCs). In a similar vein, tourism is a principal export for 83% of developing countries and the primary export for 34%. These figures demonstrate the importance of tourism to the world’s developing and least developed countries. For many, tourism is almost universally the leader in economic growth, foreign exchange, investment and job creation and offers potential comparative advantage common to all. Tourism has unique potential to carry exchange and investment directly to the local level, as tourists and the industry seek new destinations and new experiences. At the same time, tourism can contribute to rural development, community enrichment and social empowerment, conserve cultural and heritage traditions, and offer opportunities for small and micro-businesses.

Today, most governments try to adhere to the principles of sustainable development. At its session in New York in 1999, the Commission on Sustainable Development urged governments to develop tourism more sustainably: to consult with all major groups and local communities in the tourism process; to undertake capacity-building work with indigenous and local communities, in order to facilitate their active participation at all levels; and to create the appropriate institutional, legal, economic, social and environmental frameworks for the sustainable development of tourism. At the same time, governments were urged to maximise the potential of tourism for eradicating poverty, to promote a favourable framework for small and medium-sized enterprises, to take strong and appropriate action against any kind of illegal, abusive or exploitative tourist activity, to participate in international and regional processes that address issues relevant to sustainable tourism development, and to support appropriate measures to better inform tourists about cultural, ecological and other values.

2.2 Global and regional tourism trends

Based on figures provided by the World Tourism Organization (WTO) in their publication 'Tourism: 2020 Vision', international arrivals are forecast to grow annually by 4.3% between 1995 and 2020. Although Europe remains the largest tourist-receiving region it has a below average global rate of annual increase between 1995-2020 forecast at 3.1%. This reflects an overall decline in market share from 59% to 45%. In contrast, East Asia and the Pacific are forecast to increase to 7% per annum. The respective shares of Africa, Middle East and South Asia are forecast to increase to 5%, 4% and 1% respectively by 2020.

Although tourism continues to be lauded as the world's largest industry, if international tourist arrival figures were to be adjusted to numbers of active international tourists, the proportion of the world's population engaged in tourism 'internationally' is calculated at just 3.5%. With a further filter to eliminate persons who through age, infirmity or lack of financial resources are unable to undertake international travel, this level of penetration of the real potential population by international tourism by the year 2020 will only be 7%. Tourism is an industry very much in its infancy.

The principal feature of expansion of international tourism to 2020 is the predicted continued rise in the long-haul share of arrivals. By 2020 the split between intra-regional and long-haul travel is forecast to be 76:24 with average annual growth rates between 1995 - 2020 forecast of 4% and 5.4% respectively. Whereas long-haul will increase its share in Europe (from 12% to 15% between 1995 and 2020) the Americas (23% to 38%), the Middle East (from 58% to 63%) and South Asia (76% to 86%), the large volumes of first time Asian travellers will result in a rise in the intra-regional share in East Asia and the Pacific (79% in 1995 to 83% in 2020). The same pattern, though in a substantially less marked way reflecting the relative affluence of the peoples of the two regions, will be seen in Africa with the intra-regional share of arrivals rising from 58% in 1995 to 64% in 2020. The anticipated growth of intra-regional tourism will clearly impact on future intra-Commonwealth travel.

The major drivers of growth over the period 1995-2020 are numerous. Continued economic growth, the migration from a service to an experience-based economy, advances in information communication technologies and sophisticated marketing, the removal of barriers to travel in the likes of China, Russia and the countries of Eastern Europe, changing demographic structures and trends, and the impact of further globalisation are all predicted to impact on the future growth of tourism. With this growth, however, comes the challenge to manage the growth of tourism in a sustainable manner by maintaining a degree of localisation, protecting the authenticity of tourism, conserving the environment, and minimising environmental degradation. Most remarkable perhaps is the fact that, despite the numerous threats of international terrorism and instances of war and political instability, the number of international arrivals in 2002 and 2003 indicate that the forecasts incorporated in 'Tourism: 2020 Vision' are on course to be reached. This demonstrates the robustness of tourism, and its ability to withstand quite extreme negative external forces, be they real or perceived.

For the future, a more recent publication prepared for the Commonwealth Secretariat by the WTO entitled 'The State of Commonwealth Tourism 2004/5' provides a valuable synthesis of those issues of particular relevance to the development of tourism among countries both internal and external to the

Commonwealth. Issues were split into two distinct categories namely issues at the market and operational level and issues at the geopolitical level. In the context of a seemingly constant stream of disasters impacting negatively on tourism, four key issues were identified at the market and operational level, namely that:

- The industry globally has withstood the crises thrown at it and is now returning to traditional levels of growth;
- Despite the above, countries local to the recent Tsunami disaster, including Commonwealth members such as Sri Lanka, the Maldives, Malaysia and the Seychelles, have seen significant drops in tourist demand;
- The process of consolidation (and globalisation) continues unabated;
- The cost base continues to rise (reflecting higher prices for oil) and the gradual cost of increasing security apparatus.

At the geopolitical level, five issues were raised, namely:

- The increased emphasis on the Millennium Development Goals (MDGs);
- The focus in many countries within the Commonwealth is on the development of tourism which seeks to alleviate poverty;
- The new pro-development impetus in the Doha Round;
- The myriad of issues surrounding climatic change and their impact on tourism;
- The increasing presence of the WTO.

The above issues and trends are now discussed in the specific context of the Commonwealth.

2.3 Tourism in the Commonwealth

Tourism is a considerable activity for many countries within the Commonwealth and brings with it the potential to deliver economic development and foreign exchange earnings, job creation, income distribution and balanced regional development. The 53 member countries of the Commonwealth account for one seventh of all international tourist activity and one fifth of all tourist arrivals. The unique mix of countries in the Commonwealth is of particular significance in the context of tourism for it incorporates both highly developed tourist-generating countries and developing tourist-receiving countries among its members. Such distinctions are beginning to erode with globalisation as richer countries import tourists while poorer ones begin to export them. Notwithstanding, the use of English provides particular opportunities for intra-Commonwealth travel as does the variety of countries provide a valuable blend of tourism histories and experiences, interests, and expectations for future policy.

The scale of tourism in the Commonwealth is such that in 2004 direct expenditure on travel and tourism in Commonwealth countries totalled \$174bn, equivalent to 3.9% of the Commonwealth's total Gross Domestic Product (GDP)¹. It is estimated that indirect impacts of this tourism expenditure through stimulation of linked sectors to the economy accounted for an additional \$282bn of demand, or 6.3% of GDP. Although this is slightly less than for the world as a whole, it more than demonstrates the economic significance of tourism to many Commonwealth countries.

¹ The State of Commonwealth Tourism 2004/5: Commonwealth Secretariat: London.

In the context of the Commonwealth, countries in the Caribbean (33% of GDP) and Oceania (13% of GDP) have significant proportions of their economy in the travel and tourism sector. For many of the Commonwealth's small island states dependency on tourism is even more considerable. For example, Antigua's economy is 82% dependent on tourism while the Maldives, Seychelles and Bahamas are 74%, 57% and 56% dependent respectively. With regard to Oceania, the economy of Vanuatu is 52% dependent on tourism while Kiribati and Fiji are 28% and 27% dependent respectively.

The total demand generated by the travel and tourism sectors in Commonwealth countries increased by 5.9% in 2004 although growth varies regionally. For example, although growth is significant in Southeast Asia (14.9%), the Caribbean (10.2%) and South Asia (9.9%), growth in Sub-Saharan Africa (7.4%), Oceania (6.6%), Canada (4.7%) and the UK (4.0%) is less marked. However, given the larger market in the developed economies of the Commonwealth such small growth rates remain highly significant vis-à-vis Canada and the UK.

With regard to total growth the Caribbean (3%) and sub-Saharan Africa (4%) are clearly less significant but as with most developing economies, economic growth continues to be driven by the rapid expansion of tourism and related services. Although tourism does not represent a panacea for economic growth it is clear that for many countries in the Commonwealth tourism remains the principal driver.

3.0 THE COMMONWEALTH SECRETARIAT AND TOURISM

3.1 Linkages to the Strategic Plan 04/05 – 07/08

The Commonwealth Secretariat's Board of Governors approved the 2004/05-2007/08 Strategic Plan on 14th May 2004. It continues the vision of commitment to democracy and a more equitable sharing of the benefits of globalisation, a theme that is of particular relevance to the tourism industry. The two main goals of democracy (through rule of law and respect for human rights) and support for pro-poor policies (through economic growth and sustainable development) are to be measured and achieved via thirteen separate and three cross-cutting programmes.

As the primary intergovernmental organisation within the Commonwealth Association, deriving its mandates from Heads of Governments, the Commonwealth Secretariat is in pole position to take an active lead in the development of tourism across its member countries and seek solutions to develop economies in a sustainable manner and in ways which seek to eradicate poverty. Although throughout each of the sixteen programmes there is no direct mention of the benefits that tourism can bring to member states, it is clear that as a force for change tourism complements at least three-quarters of the programmes mentioned.

The sustainable development of tourism and the alleviation of poverty in the countries of the Commonwealth represent a central tenet in wider economic and social development across all countries of the Commonwealth and are integral to the Commonwealth Strategic Plan 04/05 – 07/08. Prior to the development of the strategic plan, the Commonwealth Consultative Group on Environment (CCGE) examined ways in which the Secretariat could support member states' own efforts

towards implementation of the agreements reached at the World Summit on Sustainable Development (WSSD). Yet again, tourism was highlighted as a key economic sector for many Commonwealth countries, and one that demonstrates strong potential for producing multiple benefits through the deep integration of policy objectives of the three pillars of sustainable development: economic, environmental and ecological sustainability.

To date, the principal delivery vehicle for tourism interventions within the Commonwealth Secretariat has been the Commonwealth Fund for Technical Co-operation (CFTC). The CFTC has been deployed a number of times over the past two decades to assist tourism in a number of developing member countries. Technical assistance has been in the form of tourism-related public policy, the promotion of public-private sector partnerships, transport planning, enterprise development, environment and information technology, knowledge management and marketing and promotion.

Within the broader Commonwealth, the Edinburgh Commonwealth Economic Declaration, 1997, outlined specific measures to be taken in the areas of trade, investment, development and the environment. It established a Trade and Investment Access Facility under the Commonwealth umbrella to 'assist countries with the process of adjusting to, and taking advantage of, the opportunities of globalisation'. Similar in format to the CFTC, projects under the facility have focused in the past on policy advice and technical assistance, the implementation of legal and regulatory frameworks, and the facilitation of greater involvement with international bodies, and ensuring member nations meet the requirements of international trade agreements. Tourism can clearly benefit from such initiatives as it can from institutions such as the Commonwealth Business Council (CBC) which encourages greater private-sector involvement in the promotion of international trade and investment, and the Commonwealth Private Investment Initiative (CPII). Managed by the UK-based Commonwealth Development Corporation (CDC), in close collaboration with the Commonwealth Secretariat, numerous investment funds have been launched across the four main regions of the developing Commonwealth. Investments in tourism-related areas have been a strong feature of these funds to date.

The environment is clearly central to the development and maintenance of tourism and it has featured as a topic of discussion at numerous Commonwealth meetings over the past two decades. Since the Langkawi Declaration on Environment in 1989, Commonwealth Heads of Government have continued to raise the profile of environmental issues, while recognising the balance needed between environmental protection, economic growth and sustainable development. The CCGE remains the principal forum for building consensus and strengthening co-operation on environmental issues.

Even before the 1991 Harare Commonwealth Declaration, the advancement of gender equality has been a longstanding goal of the Commonwealth. Equal opportunities for women are clearly important in an industry such as tourism where so many women seek employment. There is also the issue of equality for indigenous peoples and minority groups. This is increasingly relevant to tourism vis-à-vis the development of ecotourism, authentication of the tourism product, and the growing interest in cultural and natural heritage-based tourism.

With specific regard to linkages with the MDGs, although not always explicit in the terms of reference of Secretariat interventions in tourism, evidence from around the

world suggests that there is a widening and deepening support for them. This includes the embracing of the MDGs by the World Economic Forum and the integration of the MDGs in the development agenda of the European Union (EU). Interestingly, tourism has often served as a vehicle for social and economic exclusion rather than inclusion. Uneven distribution of benefits causes social distortions and an overloading of resources that are often scarce. With a change in focus and orientation, tourism can have an immense impact on the alleviation of poverty. This also reflects the change in orientation from the Rio Summit back in 1992 which carried an ecological focus to the social orientation of the World Summit on Sustainable Development held in 2002 in Johannesburg where the reduction of poverty and inequality were high on the agenda.

3.2 Internal relationships

Although internally, GIDD and EAD have direct involvement in tourism it is the Special Advisory Services Division (SASD) that holds strategic responsibility for tourism. Formed in January 2002 via the amalgamation of two former divisions, SASD has an annual programme budget of approximately £4 million. With a particular emphasis on focus and specialisation SASD is currently pursuing a number of areas of support for tourism within the context of its Trade mandate (Export and Sectoral Strategies, Market Development – Promotion). Based on current and pipeline demand, as well as what is perceived internally to be its comparative advantage, SASD plans to concentrate future interventions on:

- Tourism Master Plans
- Tourism Marketing Plans
- Tourism Human Resources Plans
- Tourism Marketing Strategies

The decision by SASD to focus attention on the four above key areas was supported by a critical review of the division's activities conducted internally and was confirmed recently with an internal 'brainstorming' session held for staff within SASD.

Funding for interventions in tourism is derived predominantly from the CFTC although funding to support recent Ministerial meetings has come from central funds. With regard to interventions in tourism, SASD has a very small team of expertise with limited tourism-specific knowledge. It is an environment within which the team have to learn very quickly with limited time available to come to terms with the scale and complexity of the sector. Despite the Secretariat's heritage of intervention in the sector, there appears a paucity of systems by which existing and new staff are able to learn from previous interventions in the sector. The interconnected nature of tourism serves as a catalyst for a team with considerable breadth of experience (economics, marketing, town planning etc.) as at the same time requiring a holistic overview of the sector. As such tourism expertise should be shared within and across divisions when the need arises in an open and constructive working environment.

To date, projects are primarily demand-driven (bottom-up) with SASD working within the wider context of international development, MDGs and the wider Commonwealth. Project selection criteria vary depending on their anticipated impact, relation to wider Commonwealth objectives, and experience within the

Secretariat (either through Secretariat staff or via the recruiting of suitably qualified consultants) to complete the project professionally and to a high standard. Initially, project proposals are sent to the Deputy Secretary General or Director of SASD when the CFTC Point of Contact (POC) is informed.

The principal drivers for SASD in undertaking interventions in tourism are twofold: one to assist member states in capacity building and to enhance their sector competitiveness; and two, for the interventions to meet trade objectives internal to SASD. Such support to the tourism sector is likely to remain an important element in the work of GIDD, with consensus building and policy development being conducted by EAD, but it is within SASD where the essential focus of activity will remain. Current programmes include projects to promote and build institutions in Cameroon, Mozambique, Ghana and Jamaica and the SADC and Caribbean regions.

3.3 Other international donor interventions in tourism

The Commonwealth Secretariat is not alone in providing interventions to regions and countries in the domain of tourism. Development banks, country-specific development agencies, global tourism bodies, and political groupings have all contributed funds and expertise directly and indirectly to projects related to tourism over the past few decades. Clearly the amount of funds available varies as does the nature and focus of technical assistance provided.

Among former beneficiaries and organisations one would expect to be familiar with the work of the Secretariat, the overwhelming consensus was that most had very limited awareness of the Secretariat's strategic priorities. This applies also to the mechanisms for requesting assistance. Relationships are considered to be patchy with very little communication evident. Feedback was universal in that 'grapevine' communication is insufficient and inadequate for such an organisation. When contemplating partners with which to work, the Commonwealth Secretariat was considered to be a long way down the list of potential partners, principally due to a complete vacuum as to what is going on now and what projects have been completed in the past.

Throughout the interviews conducted both internal and external to the Commonwealth, a number of 'best practice' issues came to light vis-à-vis other international donor agencies. In the Caribbean region, the Canadian International Development Agency (CIDA) was viewed in a very positive light by the majority of those interviewed. CIDA's particular domain of expertise is in the area of training and human resource development with a large number of tourism organisations recipients of CIDA aid across the Caribbean; most notably OECS (Organisation of Eastern Caribbean States) nations. With a tangible presence in the region and with high profile and effective monitoring, quarterly reports and half-yearly meetings, CIDA is widely considered to be a very accessible, open and responsive agency with which to work.

Although widely acknowledged as highly bureaucratic the European Union (EU) is viewed in a very positive light due to the sheer value of funds available. Specific feedback from the European Union with regard to this study suggests that the EU views future collaboration with the Commonwealth in a very positive light although the Commonwealth is advised to actively pursue a more deliberate policy of engagement and networking working through the quite lengthy channels that exist

within the EU. EU-backed projects in the Caribbean include the Caribbean Regional Sustainable Tourism Development Programme. This substantial programme is designed to build up a real tourism economy based on high ‘value added’, niche-oriented products with the principal programme beneficiaries’ small-medium sized hotels and tourism operators.

The Organization of American States (OAS) is also very active in the area of tourism. In recognition of the importance of tourism in the hemisphere, and in order to strengthen the tourism group of the OAS and their activities in the tourism sector, the Inter-Sectoral Unit for Tourism was created which is responsible for matters directly related to tourism and its development in the hemisphere. The work of the OAS is held in high regard in the Caribbean where currently a disaster mitigation study is being conducted. The OAS also enjoys a very good reputation for its training programmes, both generally and specific to tourism.

Although with a much broader remit than purely tourism, the World Bank (WB) has been a major catalyst for tourism and travel developments across the globe and again represents a significant potential partner for the Commonwealth. In the Caribbean, the World Bank is currently involved in the financing of vocational training programmes which are deemed to be highly beneficial. More specialised expertise is, however, available from the World Tourism Organization (WTO), a specialised agency of the United Nations. The WTO is widely recognised as ‘expert’ in the field of tourism and in that sense represents an excellent opportunity for the Secretariat to ‘piggyback’ and/or complement in future projects. The WTO is currently undertaking projects in India, Sri Lanka, the Maldives, Nigeria and Botswana with all projects being underpinned by MDGs, poverty alleviation, community-based tourism, sustainable development, and capacity building. Although much smaller in scale, the World Travel & Tourism Council (WTTC) is the only body representing the private sector in all parts of the industry worldwide. A significant number of the respondents to this study commented on the high quality of the work of the WTTC with specific reference made to inroads made in the domain of Tourism Satellite Accounting.

Other international donor agencies that are major players globally are GTZ of Germany, USAid of the United States and AusAID of Australia. With regard to interventions *per se*, particular problems have begun to appear with dealings with USAid in that its economic, development and humanitarian assistance around the world supports the foreign policy goals of the United States. This latter point is significant in that for countries not necessarily closely allied to the United States vis-à-vis its foreign policy goals aid assistance is deemed to be particularly difficult to access. This has been a very real issue for countries in the Caribbean in view of US political and military interventions in Iraq. USAid has been beneficial to Southern Africa however in that as with the EU, although the systems appear complex and cumbersome, once understood the rewards of funding can be substantial.

In addition to the above, the work of NEPAD (New Partnership for Africa’s Development) has been well received, particularly with regard to regional developments in Southern Africa. South Africa has benefited also in recent years from funds distributed by OPEC (Organization of the Petroleum Exporting Countries) and the Swiss Development Corporation. In the latter case, the fact that a field presence exists is believed to enhance the ease and speed with which technical assistance can be accessed and a mutual understanding can be developed. The Swiss also encourage ownership at the local level so once the

decisions have been made and funding distributed the recipient is left virtually free of interference to complete the project.

3.4 Secretariat interventions in tourism 95/96 – 00/01

Prior to the identification of specific expertise and comparative advantage within the Commonwealth Secretariat vis-à-vis its interventions in tourism this section identifies a number of issues arising from previously-funded tourism projects by the Secretariat. The synthesis of issues provided in this section is specific to the tourism portfolio although some may represent issues that are common across the wider Secretariat. The synthesis provided is based on the re-review of all materials conducted as part of the previous study in addition to the findings from a number of interviews conducted both internally and externally to the Secretariat by the study author. All issues represent the professional judgement of the study author based on the evidence at his disposal. All interviews conducted are recorded in Section 7.

3.4.1 Project initiation and design

- *Demand-led nature of programmes*

All programmes funded throughout the designated period were demand-driven. Although this approach is accepted as meeting ‘real’ market needs, there is a perception external to the Secretariat that success in accessing technical assistance is determined by a government’s ability to follow the necessary procedures and formulate request and project proposals more than the genuine need for a particular project to be funded. Although internally there is consensus as to the transparency of the application process this is not a view shared externally among those interviewed in both the Caribbean and South Africa.

- *Prioritisation of requests and sectoral distribution of funds*

Related to the above is the process that determines how much funding tourism as a sector receives in general and how individual sectors within it fare and the degree to which funding for tourism is grouped with broader trade assistance? The transparency of decision making also comes into question as to how the balance of activity and funds directed to those areas is determined. It is clear from the interviews conducted that the means by which funds can be sourced is not widely understood, with too much time being spent ‘second guessing’ the strategic direction of the Secretariat. This is particularly relevant to internal procedures and mechanisms in that prospective beneficiaries are unaware as to what part of the Secretariat to approach at the outset and the procedures and systems to follow thereafter.

- *Terms of reference*

On a few occasions, unrealistic and unachievable terms of reference were set in addition to the setting of unrealistic deadlines and the recruitment of insufficiently experienced consultants to complete the tasks set on time. This occasionally led to delays in the completion of projects. This problem was most evident with the appointment of suitable advisers to the Ministry of Tourism and Transport in the

Seychelles (G/SEY/093) where the appointment of consultants took up to 80% of the allocated time for the project. In this instance the plan was never completed, this despite a 6-month extension. The development of an intra-regional tourism market survey (E/SDC/006) for the Southern African Development Community (SADC) also suffered from a considerable delay in the appointment of suitable consultants.

- *Agency co-ordination*

Poor levels of communication and co-ordination were evident across some projects with other related international and national agencies leading to unnecessary overlap and duplication. One example of this was with the appointment of a consultant to conduct a tourism economic assessment in the British Virgin Islands (B/RLL/040) where an EU-backed project was taking place at the same time.

3.4.2 Project performance

- *Project management*

A view among many of those interviewed in the Caribbean and South Africa was that the quality of the management of projects internally within the Secretariat was inconsistent, with projects managed by different divisions sometimes leading to confusion and inconsistencies.

- *Consultant choice*

Although there are many good examples of consultant choice with the overall satisfaction levels recorded as adequate to good, a number of issues arose with regard to the choice of consultants. On a positive note, the greatest successes were where consultants were in the field for longer periods of time and where the choice of consultant had input from the beneficiary. Consultants are clearly deemed to be preferable if they have a good local knowledge and understand the local/regional context. Consultants need to be able to adapt to the specific needs of the country in question and be able to meet the deadlines set at the outset. When problems do occur, the Secretariat needs to be able to terminate the contracts of consultants and identify suitable alternative personnel to complete the project in the designated time scale.

Particular problems with consultants were identified in the Seychelles (G/SEY/093), with SADC (E/SDC/006) and in East Africa (X/EAC/001 and 002) where consultants were deemed to be overly UK-centric with limited awareness of 'local' issues. The appointed consultants were also deemed to have failed in the development of a tourism promotion master brochure, again for SADC (X/SDC/008), on this occasion the project being rescued with a joint initiative between the Commonwealth Secretariat and the Regional Tourism Organisation of Southern Africa (RETOSA). Instances where the choice of consultants was deemed to be highly effective were with the development of a tourism marketing plan and strategy and tourism promotion programme for SADC (X/SDC/010) and with the appointment of a tourism marketing and development adviser for St Kitts and Nevis (E/SKN/022).

- *Effectiveness of advice*

While the sustainability and implementation of advice was evaluated as average, overall satisfaction levels with the completion of projects ranged from average to moderate. This is disappointing and reflects in part the inadequacy of funding to complete the projects properly and the below average quality of some of the consultants selected to undertake the projects.

On a number of occasions, however, the Commonwealth Secretariat was chosen due to their particular sensitivity to government constraints as evidenced with projects in St Kitts and Nevis (X/STK/A023), St Vincent and the Grenadines (G/STV/030), and Trinidad and Tobago (G/TRI/060). Despite problems experienced in the Seychelles (G/SEY/093) the role played by the Secretariat was deemed to be very positive in that it was deemed to complement national capacities well.

- *Timeliness of delivery*

The actual speed with which funds for technical assistance were distributed was commended by many with Secretariat assistance deemed to be faster and more flexible than those delivered by other international agencies and tourism-related bodies. Hence, although problems may have been encountered by the delayed appointment of consultants, for example, the actual speed with which funds were made available was commended by most recipients of technical assistance.

- *Low cost of assistance*

The Low cost of assistance from the Commonwealth Secretariat was noted on a number of occasions in a positive light. Examples include development of tourism services in ST Kitts and Nevis (X/STK/A023) and appointment of a tourism marketing adviser in St Vincent and the Grenadines (G/STV/030)

3.4.3 Project monitoring and evaluation

- *Poor monitoring*

On a number of occasions monitoring was deemed to be not particularly effective. For example, a number of files were missing, inconsistencies were evident between the records of the Secretariat and the outcomes as perceived by clients, inconsistent levels of monitoring were apparent across projects with no apparent structure for monitoring in place or at least one that was being adhered to. The mechanisms, which were in existence at the time for monitoring the design, implementation and outcome of projects, were often inadequate to allow early detection and correction of problems. This was certainly the case in the appointment of suitable advisers to the Ministry of Tourism and Transport in the Seychelles (G/SEY/093).

Suitable project monitoring was required at an earlier stage with in-country representation required in a number of instances. This was deemed to be the case with SADC and the development of an intra-regional tourism market survey (E/SDC/006). With all projects, much greater use needs to be made of the feedback provided and a culture of learning from past experience needs to be adopted. There

is also a need for more deliberate measures to develop and maintain institutional memory (knowledge management) and make better use of it. There were also problems with survey response.

- *Timeliness of evaluation*

Evaluation throughout the period appeared to be ad hoc in nature. The vacuum of strategy and overall sense of direction of projects of a tourism nature can possibly explain this.

- *Project learning and dissemination of good practice*

Limited evidence exists to suggest that experiences were shared between divisions within the Secretariat. This suggests a culture of learning and transparency was not evident at the time although interviews conducted internally to the Secretariat would seem to suggest that this may still in fact remain the case.

- *End of project questionnaires and completion reports*

As identified in the original evaluation, very low response rates were recorded both for recipients and programme managers. Although pressures of time and resource constraint suggest that the minute one project is completed the next one starts, this vacuum of evaluation hinders the development of a learning culture with limited economies of scale to be gained in the longer term and the development of a genuine bank of expertise developed within the Secretariat.

3.4.4 Project ‘Best Practice’

- *Interviewing*

The widespread poor response to questionnaires (both internal and external to the Secretariat) suggests that it is a questionable vehicle for purposes of evaluation. Evaluation interviews were however deemed to be a successful methodology despite the cost and time taken to conduct such activity. One explanation for the low response to questionnaires is that evaluation is not ‘built-in’ to the project at the outset. Evaluation continues to be viewed as a ‘bolt-on’ or ‘after-thought’ rather than as an integral part of projects.

- *General satisfaction with the Secretariat*

The overall view of the Secretariat by the beneficiaries ranged from high to very high vis-à-vis the Secretariat’s role, response rate, flexibility, sensitivity, co-operation, and understanding of needs. This is a very positive outcome despite some of the shortcomings highlighted above. Reasons for choosing the Secretariat over and above other donor agencies included its reputation for quality, its speed of response and sensitivity to government constraints, its expert regional knowledge, the low cost of assistance and the fact that expertise was not available locally. It is to be acknowledged however that on a number of instances the Secretariat was selected for assistance when funds were deemed to be unavailable from other sources.

- *Regional orientation*

Although previous evaluation studies have suggested that more effective outcomes are often derived from bilateral technical assistance² this does not always appear to be the case for tourism. The Caribbean Tourism Organisation (CTO) and Regional Tourism Organisation of Southern Africa (RETOSA) have proved to be worthy recipients of funds and have established networks and relationships among members. The suggestion is not that bilateral assistance be ignored, more that when compared to other sectors the institutions and structures within tourism may be more favourable to regional assistance. The appointment of a tourism statistics adviser within the Caribbean Tourism Organization (CTO) (G/CTO/006) represents a good example of regional assistance.

3.4.5 Constraints and impediments

- *Restricted funds*

The limited availability of funds can actually hinder the completion of programmes in that terms of reference are often too ambitious for the monies available. Greater transparency and realism are therefore required from both parties. In a number of cases recipients ‘talk-up’ the proposal to obtain funding but then are unable to deliver. More funds ought therefore to be allocated for the actual implementation of projects. As was found in the evaluation of programme assistance in Southern Africa it is often the case that the assumption that a local counterpart will be able to take over the job after the CFTC expert has left tends to be unrealistic. Greater continuity is required to see the project through to completion with the launch of a mentoring process a potential future scenario.

- *Dissemination of good practice*

Limited evidence exists to indicate examples where good practice is built on and poor practice is learned from. A number of comments were made in interviews both internal and external to the Secretariat with regard to the high turnover of staff and the lack of a continued relationship. A more prescriptive system is advocated although not one that negates the speed of response and flexibility of the Secretariat. In addition, there is clearly a wealth of knowledge with the Commonwealth and among its list of expert advisers. This knowledge needs to be better handled and made use of – a suitable knowledge management system is required that facilitates greater access and use of its extensive knowledge base.

- *Vacuum of needs assessment*

Throughout the audit period there is no evidence of a region, country or sector strategy that identifies the most pressing needs in each. Although the argument for a demand-led approach is valid some guidance is advised to assist potential recipients in developing their project proposals.

² Evaluation Studies No.s 58, 63, 65 and 66.

3.4.6 Sustainability, gender and small states

- *Sustainability*

In view of its long-term orientation, short-to-medium term monitoring of sustainability is particularly challenging as it is normally dependent upon successful implementation of the project. Although certain elements can be identified in the post-project evaluation, in most instances the effects of sustainability will take a considerable amount of time to filter through. In this instance it is very difficult to evaluate the developmental impact so quickly. In all cases, the three pillars of sustainability would need to be measured in their entirety: environmental sustainability; ecological sustainability; and, economic sustainability.

- *Clarity of mission*

The extent to which projects directly relate to Millennium Development Goals and gender issues and the alleviation of poverty are not always clear. The suspicion is that they are met indirectly and/or by chance. The demand-led nature of projects makes it difficult to more fully influence this aspect.

- *Small states*

Feedback from both the previous audit and interviews conducted externally to the Secretariat suggests that technical assistance received is proportionately more important for small states than it is for larger ones. One issue is the extent to which smaller states can benefit even more from closer collaboration with their larger, more developed neighbours. This leads to the dissemination of good practice among member states than direct from the Secretariat. The organisation of regional meetings, workshops or one day seminars may be a more cost effective way of dissemination than the appearance and eventual disappearance of an expert.

3.5 External perceptions of Secretariat interventions in tourism

In view of the multiplicity of issues discussed in the preceding section, it is appropriate at this stage to identify the external perceptions of the Secretariat's interventions in tourism. Once understood, an analysis of the outcomes of past projects and the external views of previous recipients of assistance, other donor agencies, and stakeholder groups (i.e. banks and development corporations) will contribute to the identification of those areas in which the Secretariat demonstrates a comparative advantage in the marketplace for interventions in tourism.

Areas in which the Commonwealth Secretariat is viewed in a positive light externally vis-à-vis its interventions in tourism are as follows:

- The Secretariat in general retains an excellent breadth of reputation on the international stage despite the recognition that funds available for technical assistance are limited. This is particularly recognised by the WTO and EU who are willing partners for projects of a tourism nature whenever and wherever it is deemed appropriate.

- The Secretariat retains a good pedigree vis-à-vis its technical assistance in traditional areas, especially that of market research.
- Secretariat funds, although small in comparison to other larger and more focused agencies, can serve as a crucial catalyst for greater involvement in and potential funding for tourism projects (most notably for small states) and can often facilitate regional co-operation and engender the development of successful relationships.
- Funds can be accessed very quickly with decisions often made in a short period of time.
- Real progress has been made in some areas with both the CTO and RETOSA widely being regarded as good examples of successful regional tourism organisations.
- Mature destinations within the Commonwealth accept that funds are more likely to be channelled to developing nations. In this instance, developed member states can serve as a vehicle to disseminate good practice to developing member states.

There are however a number of areas in which the Commonwealth Secretariat is viewed in a less positive light externally vis-à-vis its interventions in tourism.

- The Secretariat lacks a sufficient volume of staff that are sufficiently experienced in tourism and that are able to champion their expertise both internally and externally to the Secretariat. The Secretariat needs to more fully understand the multi-sectoral and interdependent nature of tourism and its full range of impacts.
- Although the Secretariat is acknowledged as acting quickly the outcome of the decision-making process is more difficult to gauge than with most other agencies.
- Historically projects have been of a short-term and ad hoc nature with limited direction and opportunities to develop excellence in one or a select few areas of expertise.
- The Secretariat retains a reputation for working in isolation with limited attempts made to foster long-term relationships with other international agencies. This has negative implications on the ability to develop and maintain an established network with continuing failure to engage fully with the key players as does it engender a propensity to duplicate what is being done elsewhere. Via more proactive communication with other agencies and countries, partners can more neatly dovetail the annual planning cycle of the Secretariat and facilitate collaborative working.
- One of the outcomes of poor networking and relationship development is the inability to source suitably qualified consultants to undertake the projects. This has been a longstanding problem for the Secretariat generally and can also be attributed to the levels of remuneration as well as any inadequacies of networking.

- Although the Secretariat advocates an open agenda vis-à-vis project type, the lack of suitable project parameters and guidelines make it difficult to prepare projects. Considerable time can be invested in a project proposal when at the outset no funds are likely to be made available in certain areas.
- Although the benefits of demand-led projects are acknowledged it is recognised that some regions and countries may lack the skill set to apply properly for assistance.
- External perceptions are that limited market research has underpinned the selection of projects with no obvious country, region, or sector strategy being in existence.
- No obvious contact point exists for projects of a tourism nature with confusion among outside agencies and potential recipients of technical assistance as to the application process.
- Widespread dissatisfaction with the overall level and quality of communication from the Secretariat in general and specific to tourism and a perception that tourism is 'lower down' the list of priorities for the Commonwealth as compared to a few years ago.

Perhaps that issue recurring most often is the need for the Secretariat to engage more fully with other international donor agencies and associated bodies. Whereas networking takes place among most donor agencies the Commonwealth is widely acknowledged as not being 'on the circuit'. The Commonwealth needs to be far more proactive to gain fully from the networking opportunities that are already in existence. Greater collaboration is a distinct reality if the Commonwealth wishes to pursue a more proactive agenda.

There was also the suggestion that future interventions could be conducted in co-operation with other agencies where competencies are complementary, as could assistance be provided with local providers with expert knowledge and particular familiarity with the regional or local context.

3.6 The Secretariat's considered comparative advantage in tourism interventions

In view of the preceding sections, the Commonwealth Secretariat is believed to have a comparative advantage in the domain of tourism in the following areas. The Secretariat is considered to:

- Be truly international in its outlook while demonstrating excellent 'broad' local knowledge;
- Be credible, reliable, independent and 'politically' neutral;
- Be generally responsive to innovative 'demand-led' projects (despite reservations about transparency about the application process);
- Have had a long-term involvement in the domain of tourism and thus ought to contain significant accumulated knowledge;

- Demonstrate considerable affinity and trust with its member states;
- Be a credible catalyst for the raising of additional financial resources from other international donor agencies;
- Serve as a vehicle to shared-funding opportunities and further collaboration;
- Offer good quality, cost effective technical assistance;
- Be flexible with a suitably quick speed of response with regard to the allocation of funds;
- Understand the culture of recipient governments and organisations;
- Have the ability to conduct effective institutional strengthening due to its close working relations with tourist organisations around the Commonwealth.

3.7 Modalities for delivery of Secretariat assistance

With regard to suitable modalities of delivery the view from all those interviewed both internally and externally to the Secretariat was that the Commonwealth Fund for Technical Co-operation (CFTC) has worked well in the past and that it was a formula that was understood (albeit to varying degrees) and accepted. It is widely acknowledged however that although considered to be a relatively cost-effective means of delivering technical assistance, far greater communication is required to inform member governments and tourism organisations as to where its priorities lie. Understandably, calls were unanimous for more funds and a greater sense of strategic direction to assist claimants. In addition, a number of interviewees commented on the success of the Service Abroad Programme despite frustrations as to the very small size of the allocated budget which clearly limits its progress.

In addition to the CFTC, interventions in tourism can clearly originate from institutions such as the Commonwealth Business Council (CBC) which encourages greater private-sector involvement in the promotion of international trade and investment, and the Commonwealth Private Investment Initiative (CPII). Managed by the UK-based Commonwealth Development Corporation (CDC), in close collaboration with the Commonwealth Secretariat, numerous investment funds have been launched across the four main regions of the developing Commonwealth. Investments in tourism-related areas have been a strong feature of these funds to date.

One alternative means of delivering assistance is for funds to be allocated to facilitate the exchange of ideas and personnel both within and across regions as a means to disseminate good practice. Rather than rely on the ad hoc arrival and eventual disappearance of ‘outside’ consultants, the dissemination of good practice among industry players and tourist organisations is believed to offer better longer-term prospects for intra and inter-regional co-operation and for the development of intra-Commonwealth travel. A related issue is the idea of mentoring whereby more senior members of the industry in more developed tourism economies can serve as mentors to ‘rising stars’ in the developing economies and small island states. The rationale behind both alternative modalities of delivery is that by maintaining communication and dialogue within the industry greater longer-term benefits and

dissemination of good practice are likely to accrue. This scenario can also be applied to regions or countries themselves whereby they serve as ‘pathfinders’ for national or regional dissemination of good practice.

One significant untapped source of expertise across the Commonwealth is the wealth of ‘real world’ experience that exists within the Commonwealth’s universities. Tourism is now a highly credible academic discipline in many universities across the Commonwealth most notably in the United Kingdom, Canada, Australia and New Zealand. Many leading academics from Commonwealth universities have extensive expertise in all aspects of tourism and represent a more cost-effective vehicle than more traditional consulting companies. As with leading industry figures, leading academics can serve as mentors to member states and national and regional tourist organisations, can serve as facilitators of exchange of ideas and good practice and act as principal points of contact for claimants when preparing project bids. Academia offers a wealth of expertise in the domain of tourism which to date has been bypassed by the Secretariat.

3.8 Commonwealth Tourism Ministerial Meetings

In recognition of the importance of tourism to so many of its member states, the first ever meeting of Commonwealth Tourism Ministers took place in Kuala Lumpur in March 2004. Although an initiative driven by the Malaysian Government, the meeting was held to focus attention on ways in which the Commonwealth might support the sector in the years ahead. In his opening address at the inaugural meeting in Kuala Lumpur, the Secretary General remarked on three principal reasons as to the importance of Commonwealth Tourism Ministers coming together in this way. Firstly, that there is huge growth potential for tourism among Commonwealth countries and that strategies can be identified to boost that potential and follow through with concrete outcomes. Secondly, that the promotion of tourism within the Commonwealth can be an important tool in the alleviation of poverty. Thirdly, that the bringing together of ministers will help facilitate co-operation further on a range of issues, including security, investment and capacity building for the mutual benefit of all member countries.

In view of the above, agreement was reached at the meeting that tourism is of significant direct and indirect economic benefit to most Commonwealth countries, as does it offer considerable opportunity for economic growth and to the alleviation of poverty and the enhancement socio-cultural well-being. The fact that Commonwealth countries share a wealth and diversity of tourism products with common bonds of culture, heritage, language, and sport was also noted. One of the key outcomes of the meeting in Kuala Lumpur was the creation of a Commonwealth Tourism Centre (CTC), deemed by some to be that vehicle most suited to the needs of the Commonwealth. Initial ideas and agenda items were then evaluated by a working party via the Secretariat with the final parameters of such a centre being finalised at the second Commonwealth Tourism Ministers’ Meeting held in Abuja, Nigeria in 2005.

Clearly one of the issues for the future is the means by which SASD and the CTC work together for the benefit of tourism across the Commonwealth. Although two quite separate entities one of the most pressing issues is the clarification of responsibilities and roles between the two so that each can complement one another and project a strategic external front to the Commonwealth – and world – at large. At the time of writing this report the CTC remains an idea that has yet to

fully come to fruition. Therefore, on the one hand it is appropriate to exclude such an initiative when exploring the future strategic direction of the Secretariat in its interventions in tourism. However, the political effort attributed to the development of the CTC to date suggests that the Secretariat is best advised not to ignore such an initiative and the potential for confusion in the marketplace with the existing of two Commonwealth tourism organisations. For example, many of the pledges arising from the Abuja Meeting and accompanying mission of the CTC (see Appendix 1) are equally valid to the work of SASD.

Interestingly, and perhaps of some concern, is that very little input for the development of the CTC appears to have come from the industry itself. For example, previous beneficiaries of technical assistance report very limited awareness and understanding of the new developments. Comments were advanced that although intra-Commonwealth travel is a laudable goal, it is likely to be very difficult to implement in view of the existing structures of international travel and transport infrastructures. Some concern was also raised as to the anticipated return expected by those governments integral to the development to date. The key point here is that if the CTC is to work effectively then close co-operation needs to be initiated, developed and maintained with those stakeholders integral to its success.

Overall, the launch of the Commonwealth Tourism Centre was viewed externally in a positive light, especially if it is to be managed by professionals. It was recommended, however, that particular attention be given to the work being conducted by similar entities in the ASEAN region, Japan and the South Pacific to avoid unnecessary overlap and duplication of effort. More market research will be required to assess the real value of intra-Commonwealth travel.

4.0 ISSUES FOR THE FUTURE DEVELOPMENT OF TOURISM

In order to match the positive attributes of the Secretariat's interventions in tourism that contribute to its perceived comparative advantage in the marketplace, it is appropriate first to identify those issues in the external environment that serve as forces for a change in the strategic priorities of the Secretariat. Once such issues have been identified and explored specific recommendations can then be made as to how best the Secretariat ought to prioritise and accommodate its future interventions in tourism in view of its resource and capacity constraints.

4.1 Generic issues

Having synthesised the views of those interviewed both internally and externally to the Secretariat – and considered the conclusions of numerous publications in the field – it is the professional view of the author that the principal issues likely to impact on the future development of tourism for the foreseeable future are as follows:

- *Tourism as a development panacea*

For many countries around the world there is a clear need for further economic diversification and the need to reduce the level of dependency on tourism for

economic growth. This is especially so in many small-island developing states (SIDS) where tourism economies are particularly vulnerable to external forces. For many SIDS, despite numerous efforts to further diversify their economies, tourism remains the principal economic activity vis-à-vis income generation, employment creation and foreign exchange earnings. In this context, it is also significant that SIDS are widely regarded as facing greater complexities and challenges – particularly with regard to sustainable development – than larger destinations.

- *Natural and man-made disasters*

Recent years have seen an upsurge in the number of natural and man-made disasters impacting on tourism. Although the tourism industry is unable to control such forces of nature or acts of man-made disaster tourism planners and strategists ought to incorporate contingency planning into their longer-term and operational plans for destinations. With considerable global interventions vis-à-vis disaster mitigation, availability of drugs and medicines, food and debt relief, it must be added, however, that the development of tourism is not always as high on the political agenda as perhaps one would like.

- *Climate change*

Global warming is already having a direct impact on tourism in that destinations across the world have to manage more extreme weather conditions, cope with shortages of water and accommodate the changing seasonal patterns of tourist demand. Climate change is a concern for all destinations, but especially SIDS, low-lying countries and least developed countries.

- *Globalisation*

The greatest single force impacting on tourism, its development, and the future structure and nature of its linkages, is that of globalisation. Within the wider debate on globalisation, tourism represents something of a paradox. On the one hand it is an industry that is dominated by SMEs. In contrast, it incorporates some of the most excessive examples of globalisation in those sectors that are dominated by highly mobile capital-intensive production processes; namely, airlines and cruise ships. For tourism generally, globalisation represents a mixed blessing. It can provide the consistency in product standards that helps to overcome the uncertainties that generally accompany travel and tourism quality. It can also fuel antagonism by facilitating two of tourism's most provocative characteristics, foreign ownership and foreign employment. For small-to-medium sized enterprises (SMEs), globalisation brings a stark message to operators: adaptation and the forming of alliances are vital to survival. Not only do SMEs have to survive the competitive pressures brought on by globalisation, they must also learn to take advantage of developing technologies that are changing the product and giving them access to new markets. Through co-operation and alliances, SMEs can still provide local responsiveness within a global market place.

- *Relations with the financial sector*

Although in many instances tourism is widely believed to be a relatively low risk development with potentially good long-term returns, and despite the fact that tourism continues to underpin economic growth in many countries, the financial sector continues to view tourism as a low-return high-risk sector. This issue serves

as a major impediment to the local ownership of hotels, attractions and transport operations and merely reinforces the driving force of globalisation and the further consolidation of the industry by large multi-national enterprises with the financial resources available to underpin the necessary risk.

Although an issue for destinations and regions generally the issue of local ownership is a particular problem for the Caribbean not least due to the vast influx of cruise arrivals to the region over the past decade. Cruise arrivals represent the fastest growing segment of the industry and will soon rival the hotel sector in bed/berth capacity. This in turn leads to the issue of cruise conversions in that one of the principal challenges for the authorities is to market aggressively to tourists partaking cruises in the region to return as more conventional land-based tourists in future years.

- *Perceptions of the tourism industry*

Poor perceptions among the host community do little to raise the profile of tourism as a source of employment and economic growth and hinder the level of service quality by existing employees thus impacting on the overall quality of the tourism product. Poor perceptions among the host community toward tourism as a worthy industrial sector within which to work is one of the principal reasons why islands in particular continue to import labour. This then continues to exacerbate the high economic leakage of tourism in small islands. Changing perceptions of the local community is a long-term project but one that is essential if many countries are to develop a more economically sustainable tourism product.

The issue of poor perceptions of the industry is one that the Seychelles has in fact addressed head on via the development of a tourism awareness programme. In the context of the Seychelles the programme includes the incorporation of tourism in the school curriculum and presents tourism as an attractive employment and career opportunity. In the longer term it is intended that this intervention will have a positive impact on the quality of personnel entering the industry and the quality of the product/service.

- *Information requirements*

Tourism continues to suffer from a paucity of current and reliable data and remains an industry where too many assumptions still have to be made in order to make realistic and objective decisions. More accurate measurement would help communicate to local people the benefits to be derived from tourism and to the banking sector in particular.

- *Industry change*

Across all sectors of the wider tourism industry change is occurring at great speed. Change is primarily being driven by developments in technology, shifts in patterns of tourist behaviour, the increasing consolidation and 'globalisation' of the industry, and the competitive pressure arising from 'no frills' air carriers across Europe, Asia, Australia and New Zealand. Pressure to adopt more sophisticated security systems as at the same time alleviate problems of congestion also represent forces for change. Most notable perhaps is the means by which poorer developing countries are able to accommodate and afford the measures necessary to maintain, let alone grow, their tourism economies.

- *Safety and travel advisories*

Increasingly the issue of personal safety and perceived fear of danger represents a significant variable when tourists are making decisions as to where to visit. Global demand for tourism continues apace but the willingness to delay or switch travel to destinations considered to be ‘safer’ rather than cancel in the face of continued uncertainty represents a new phenomenon and one that all destinations need to take into account. One of the principal concerns among destinations however, is the proliferation in the volume and importance attached to government-driven travel advice. Tourism is inextricably linked with politics and demonstrates a high degree of susceptibility to external influences.

- *Managing the media*

Current concern about travel advice is not so much with its accuracy, but with its sometimes sensational reporting in the media. Managing the media and the flow of information is therefore vital for future crisis management.

- *Market and product development*

To help counter negative travel advice from some markets, destinations would be wise to reduce their dependence on a single, major tourist-generating market and to source alternative, less crisis-sensitive markets. They need to work in closer co-operation with government travel advisories and to keep them accurately informed on a regular basis. Destinations are also recommended to reduce, where possible, the amount of foreign ownership of their tourism product. Rather than rely on international tourists the development of regional tourism markets and domestic tourism opportunities are crucial to the longer-term sustainability of the tourism product.

- *Economic leakage*

Due to the necessity for imported goods and services, and the frequent repatriation of profits, a number of countries – most notably small islands – have a number of additional hurdles to jump when seeking to achieve economic sustainability of the tourism product. Although leakages can be even higher in some other sectors they are constantly high for tourism across most SIDS. With the increasing globalisation of the tourism product it is unlikely that this issue will become any easier to confront in the years to come.

- *Remoteness from core markets and dependence on air access*

Due to the remoteness of many destinations – most notably in SIDS – from their core markets it is obvious that considerable dependency on air access is a major issue for many destinations. With insufficient resources to finance their own airlines many destinations are dependent on an increasingly ‘alliance-led’ global airline structure with which they have limited influence. This is a particular problem for the islands of the Caribbean. With the three regional airlines Air Jamaica, BWIA West Indies Airways (BWIA) and LIAT The Caribbean Airline (LIAT) continually reporting operational and financial difficulties, the region is likely to become even more reliant on foreign-owned carriers. Clearly, more effort needs to be made to explore long-term partnerships with both mainland and island airlines to consolidate service and stabilise visitor access to the region. This issue alone

serves as a particular impediment to the development of intra-Caribbean tourism and the wider goal of intra-Commonwealth travel due to the considerable difficulty of accessing the different islands. Current arrangements are inflexible, expensive and are often owned by overseas players.

- *Integration of policy*

Irrespective of what solutions are to be found it is imperative that all policies pertaining to transport are harmonised with islands' policies for tourism. In fact tourism cuts across so many sectors, levels and interests that there is the constant need to integrate policy for tourism with national development plans more broadly.

- *Maintaining product quality*

With increased competition from all parts of the world, where often the benefits of cheaper labour and larger economies of scale and scope maybe significant, many destinations remain under continued pressure to re-invest in their tourism product to both maintain and increase their real and perceived product quality.

- *Institutional change*

The speed with which the industry and markets are changing is likely to precipitate change in the institutions that manage tourism, especially at the destination level. Increasingly local, regional and national tourist boards, associations, trade groupings and confederations have to work together to maximise limited resources and more effectively address the needs and requirements of the industry and market. Irrespective of the issues at hand, collaboration is widely recognised as the principal vehicle to address problems increasingly too great and too costly for individual institutions and countries to address in isolation. This was evident most recently with the Tsunami and its impact on tourism in the region. Disasters aside, one can question the future legitimacy of publicly-funded institutions that exist within tourism and the extent to which many of the tasks undertaken by them can be better managed in the future either privately or by public-private sector partnerships.

- *Service quality*

Many mature destinations are beginning to demonstrate varying degrees of service quality. This is widely accepted as inadequate to meet the needs of more demanding and discerning tourists who are able to compare and contrast service quality with other less-mature destinations around the world.

- *Channels of distribution*

In view of the considerable developments taking place with regard to electronic channels of distribution, existing channel dependencies are likely to change in the foreseeable future. In response, it is crucial that proactive measures are taken to both accommodate and pre-empt change in the nature of booking and payment patterns in the years to come.

- *The environment, sustainability and quality ‘niche’ tourism*

Considerable pressures exist on the environment with the exponential growth of tourism in many parts of the world. Particular causes for concern include the pressure on the demand for water at a time when considerable shortages are being reported around the world, aesthetic damage and noise pollution.

An opportunity for some and a threat to others are the growing pressures for sustainable tourism products and the growth in demand for quality ‘niche’ tourism products. The result of a combination of lifestyle and travel behaviour change, increasing environmental legislation, and the strengthening of social issues in the wider environmental agenda, small scale, and eco-based tourism developments represent a significant opportunity for a number of countries. In contrast, for those countries with a more developed tourism economy such developments raise cause for concern in that their economies are predominantly dependent on more traditional mass tourism markets and a sophisticated tourism product.

- *Alleviation of poverty*

Driven in part by the WTO’s ST-EP (Sustainable Tourism – Elimination of Poverty) initiative to link sustainability and poverty, poverty alleviation serves as a major catalyst for developing countries to tap into the benefits that tourism can bring if managed in a truly sustainable manner.

- *Tourist taxation*

Although not a major issue at present the levying of tourist taxes (be they direct or indirect) can have detrimental impacts on demand. Although maybe necessary for the funding of environmental initiatives it has to be recognised that much leisure travel is highly sensitive to changes in price. This in turn can severely impact demand and consequent yield to be derived from incoming tourists. There is also the issue of the extent to which governments actually tax the tourism industry itself as a means of generating income for other developments. This is an issue in the Seychelles were it is reported that government taxation on tourism will not exceed levels that discourage investment in new facilities and services or the upgrading of existing facilities and services.

- *Marketing and branding*

Tourism is and remains a marketing and promotion-led industry. Although countries around the world are at various stages of maturity vis-à-vis their stages of tourism development, and hence the degree to which marketing and promotion are necessary, most destinations around the world face considerable levels of competition. In the context of recent disasters, one of the most notable competitive trends is the speed with which markets change their patterns of travel behaviour post-disaster. This is something that both developing and developed economies share in that tourists are now far more prone to consider safety and security issues prior to travelling than was clearly the case pre 11 September 2001. Destinations now require a delicate balance between short-term value-driven activity on the one hand and long-term brand building activity on the other. One disaster can have numerous different impacts on different markets which then impact on destinations to varying degrees of severity.

- *Carrying capacity*

Although carrying capacity has long been an issue of considerable debate questions remain as to how it is calculated and monitored. Currently too many assumptions have to be made to calculate impacts which hinders the overall degree of accuracy in measuring community impacts and sustainability.

4.2 Issues specific to the Commonwealth

Although all of the above issues and priorities are relevant to Commonwealth countries, there are a number of quite specific issues that can be addressed to the wider Commonwealth. Again, having synthesised the views of those interviewed both internally and externally to the Secretariat – and considered the conclusions of numerous publications in the field – it is the view of the author that additional issues likely to impact on the future development of tourism within the Commonwealth are as follows:

- *Intra-Commonwealth travel*

Although much can be achieved via effective marketing and brand development, alone they are insufficient to develop further intra-Commonwealth travel. Theoretically, intra-Commonwealth travel offers numerous opportunities for member countries due to their common history and shared languages, religions and education, close political ties, and a common sense of purpose. If intra-Commonwealth tourism is to develop in a sustainable form, it is advisable for member countries to move beyond traditional approaches to marketing and re-examine the infrastructures necessary for tourism to prosper and expand ‘intra-regionally’. For example, improved air links, immigration controls, and a spirit of openness and co-operation between national tourism bodies would represent a start. Further collaboration to facilitate the freer movement of tourists and the joint-development of attractions, facilities, and major events is also to be recommended.

Although intra-Commonwealth travel represents considerable opportunity for growth, it is necessary for the issue to be examined in a wider context. For example, existing travel flows are to be ignored at their peril, particularly in the Commonwealth Caribbean where the importance of the American market can not be understated. In the UK, the growth of intra-European travel has done much to mitigate the fallout of the events of 11 September 2001 and the predictable drop in the number of Americans crossing the Atlantic while in the Seychelles, Maldives and Sri Lanka, India now represents a key market. The tourism economies of Commonwealth countries thus need to be able to accommodate, satisfy and exceed the needs of increasingly diverse origin markets and need to become less reliant on historical markets for future growth.

- *Leadership and governance*

Due to the diversity of its member countries, their various stages of economic development and interest in tourism as a force for economic and social benefit, it is recommended that clear governance structures exist that are likely to facilitate real progress in the domain of tourism development within the Commonwealth Secretariat. There too is a need for effective leadership. Tourism permeates so many

aspects of the wider strategic plan of the Commonwealth that a balance needs to be maintained between individuals within SASD with sufficient tourism-specific expertise and individuals with the necessary political and business acumen to foster the necessary relationships external to the Secretariat.

- *Funding for tourism-related technical assistance*

With regard to available funding and scope of activity, it is essential that suitable funds are made available to provide the necessary foundations for progress. Historically, the Commonwealth has spread its limited funds too thinly. For the future, funding needs to be adequate and sustainable and well targeted if tourism is going to be able to help eradicate poverty and provide genuine opportunities for Commonwealth citizens.

- *Regional collaboration*

As a vehicle to maximise resources and benefit from shared experiences regional collaboration is an essential pre-requisite for the future development of Tourism across the Commonwealth. Already, good examples exist such as the Caribbean Tourism Organization (CTO) based in Barbados and the Regional Tourism Organization for Southern Africa (RETOSA) based in Johannesburg. These and other regional entities need to be fostered and enhanced to make best use of the limited funds available.

For many SIDS, regional collaboration is made more difficult by their often: distant geographic location; varied political systems; diverse historical and colonial backgrounds; economic prospects and varied degrees of economic and tourism development maturity; ecological fragility; and, different languages and religions. Despite the existence of such barriers, the severity of the external environment is such at the current moment in time that it serves as a catalyst for collaboration.

- *Political ties*

Political ties with ex-colonies, the European Union and the United States for example remain important in that historically aid finance and the provision of tax incentives have largely created much of the capital base of the tourism industry (airports, docks and major roads) for outside investors. In view of the current uncertain political climate with the United States and the emerging conditions attached to aid finance (most notably as a consequence of the war in Iraq), much of the Caribbean is believed to be in danger of losing aid finance that historically they may have taken for granted. If anything, this merely reinforces the current and future involvement of the Commonwealth in the region.

- *Issues specific to Southern Africa*

Despite the presence of multiple donor agencies in the region, Southern Africa has continued to face a number of significant challenges in the development of its tourism product. In particular, the absence of joint and coherent policies has tended to have an inhibiting effect on the growth of the tourism sector across Africa, most notably in sub-Saharan Africa. In this context, the Regional Tourism Organization of Southern Africa (RETOSA) represents a significant step forward in that it seeks to develop the combined tourism interests of its 14 member states

under a mandate of marketing and promoting the region in close co-operation with the region's national tourist organisations and the private sector.

Although perhaps a little dated, poor perceptions of the region continue in many source markets. Whether such perceptions are underpinned about worries over safety and security, disease, poor environmental and social issues, political instability and/or crime is in some ways irrelevant. A combination of real change on the ground and significant regional marketing are necessary for the foreseeable future if perceptions are to begin to change.

Finally, problems of ownership and land rights serve as a major barrier for inward investment to the region across all economic sectors but especially in tourism where local investment is needed to accommodate the goals of sustainability. Issues over land ownership clearly hinder the development of physical capacity as do they continue to undermine overall investment in the region.

Bilateral or triangular border developments are crucial in building tourism capacity in many areas of the world but this is especially so in Africa where many significant destinations cross-political boundaries. Joint initiatives between Mozambique and South Africa are just one example where capacity can be built based on cross-border collaboration.

- *Formalisation of the 'informal' sector*

Although a problem in many regions, the need to formalise the 'informal' sector within Southern Africa is considered vital in raising the level of quality and product/service consistency across the board. It is believed that the prevalence of 'informal' operators is a particular contributor to the poor perceptions demonstrated by many toward the region.

5.0 STRATEGIC PRIORITIES AND ACTIONS FOR THE COMMONWEALTH SECRETARIAT FOR FUTURE INTERVENTIONS IN TOURISM

The previous section provided a comprehensive list of issues projected to impact on the future direction of tourism both within and outside of the Commonwealth. The majority of issues are clearly generic but some (as evidenced in Section 4.2) are more specific to the destinations within the Commonwealth.

In view of the considered comparative advantage of the Commonwealth Secretariat as highlighted in Section 3.6 and the Secretariat's acknowledged constraints of resources and funding, this section identifies a number of priorities that the Secretariat need to address if it wishes to retain one of its specified roles: a focussed international provider of technical assistance in the domain of tourism. By coincidence, the plan by SASD to concentrate future interventions on four specific areas is deemed to be an approach that is consistent with the outcomes of this study. The four strategic areas identified by SASD (and outlined in Section 3.2) are: Tourism Masters Plans; Tourism Marketing Strategies; Tourism Marketing Plans; and, Tourism Human Resource Plans. These four areas serve as effective vehicles for the Secretariat to bring together the majority of those issues highlighted in Sections 4.1 and 4.2 and provide a focus for the future development of strategies

and plans in tourism. A summary of the issues falling into each area is provided below:

5.1 Tourism Master Plans

- Tourism's role as a catalyst for development.
- The need to modify perceptions that tourism represents a development panacea.
- The means by which economic leakages can be minimised for destinations to benefit further from development.
- The need to incorporate contingency planning into master planning.
- Inclusion of the three pillars of sustainability and encouragement of local ownership, strategies to alleviate poverty and issues pertaining to carrying capacity.
- Proactive communication to stakeholder groups most notably community groups, the financial services sector and wider industry.
- Institutional developments which can include destination management structures, holistic approaches to destination management, policy integration, effective forms of collaboration and regional partnership structures.
- Initiatives to facilitate the management of tourism which can include knowledge and information management initiatives and structures and approaches to manage change.

5.2 Tourism Marketing Strategies and Tourism Marketing Plans

- Exploration and use of alternative/innovative channels of distribution.
- Strategies for product and market development including the development of quality 'niche' tourism products and an investigation into the potential for intra-Commonwealth travel and associated implications.
- The development of effective marketing communications strategies.
- Strategies to develop cross-border initiatives and collaborative marketing opportunities.
- The development of effective media relations and public relations activity.

5.3 Tourism Human Resource Plans

- The development of training initiatives to further the level of service quality in destinations.
- A range of training programmes to advance the level of expertise in the sector and overall level of professional development.

5.4 Strategic priorities

To help facilitate the above a number of strategic priorities are proposed. In order of priority the strategies proposed are as follows with an accompanying rationale and actions required to meet the set priorities.

5.4.1 Priority 1: To continue with interventions in the tourism industry

Rationale:

The economic significance of tourism to so many Commonwealth economies, its ability to serve as a catalyst for development more generally, and its acknowledged contribution to the alleviation of poverty represent three arguments in favour of the Commonwealth Secretariat retaining an interest in interventions in the tourism industry. From those external issues highlighted in Sections 4.1 and 4.2 it is clear that all destinations – irrespective of size or location – are set to face a number of challenges in the years to come. Although true for all destinations, such forces of change are particularly stark for developing countries. As evidenced in Section 3.6, the Secretariat is acknowledged as providing politically neutral, responsive, cost-effective and relatively prompt interventions in the domain of tourism that are well received by recipients. As an organisation it is well trusted, understands clearly the culture of recipient governments and serves as a catalyst for the raising of additional financial resources from other international donor agencies. Finally, the recent review of activities within SASD and its adoption of a strategic approach to its interventions in tourism are to be welcomed and are consistent with the resources at its disposal and the findings of this study.

Actions Required:

1. Maintain the existing strategic approach to interventions in the tourism industry.
2. Communicate the approach more clearly to recipient countries and points of contact.
3. Communicate to key stakeholders and other international donors the Secretariat's strategic approach to interventions in the tourism sector and areas of specific expertise.
4. With regard to the issues identified in Sections 4.1 and 4.2 the Secretariat is recommended to:
 - (a) Continue to encourage the development of tourism although for those with already high levels of dependency encourage them to seek more sustainable, local solutions and levels of ownership. At the same time they should be encouraged to seek alternative sources of economic development;
 - (b) Encourage destinations in mature markets (such as the Caribbean and parts of Oceania) to seek new markets (intra-Commonwealth travel) and identify new product development opportunities;
 - (c) Develop/maintain regular dialogue with the financial services sector, host communities, and local and regional media outlets, to communicate more robustly the economic benefits to be derived from tourism;
 - (d) Stress the importance of 'quality' data to recipients of funding as a means to underpin effective decision making and as a condition upon receipt of future technical assistance;
 - (e) Revisit existing institutional structures (locally and regionally) and review their appropriateness for implementing the master plans, marketing strategies and human resource plans delivered via technical assistance.

5.4.2 Priority 2: *Maintain strategic focus and funding*

Rationale:

Rather than approach the funding, support and development of tourism in a piecemeal manner, the Commonwealth Secretariat is recommended to take a strategic lead in advocating more strongly the role of tourism as an active catalyst for change. Rather than merely responding to the forces of change, opportunities exist to provide a genuine sense of direction, facilitate suitable linkages, advance skills and training, and exert influence on other associated tourism and trade bodies around the world in support of its myriad of tourism economies.

Geographically, and with such limited funds at its disposal, the Secretariat is recommended to continue to focus interventions on the four strategic areas identified on those countries with the greatest need, particularly small states and those lacking funding and suitable expertise. In addition, cost-effective interventions ought to be maintained with regional providers who can offer additional and effective dissemination across many member states. In addition, the Secretariat is recommended to concentrate activities where it has a comparative advantage and good track record. The comparative advantage of the Secretariat in tourism lies with its overall approach and ability to call on individual expertise from across its divisional structure. The Secretariat offers a number of institutional advantages over some other more specialised agencies, the level of trust, credibility and reliability in its relations with recipient governments a significant benefit when conducting projects.

Actions Required:

1. Maintain the CFTC as that modality most suitable for future interventions.
2. Maintain a strategy of full funding for projects and avoid the burden of adopting match-funding strategies.
3. Consider only those projects that meet one of the four designated strategic areas of expertise in the domain of tourism.
4. Continue to seek opportunities to disseminate the outcomes of projects regionally via regional tourism organisations.

5.4.3 Priority 3: *Develop a proactive and network-driven orientation*

Rationale:

Rather than rely solely on demand-led projects the Secretariat needs to adopt a more prescriptive and proactive ‘needs driven’ approach in identifying areas where it can make a real difference as at the same time remaining fast and flexible in decision making. Projects are currently too demand driven with too much uncertainty evident among prospective recipients of funding with regard to the areas of expertise and strategic interest of the Secretariat. Via the adoption of a more strategic focus – as identified in priority one and two – it is the intention that recipient governments will be more aware of the Secretariat’s tourism intentions with a closer match between needs and the provision of technical assistance forthcoming. To date, the over emphasis on demand-led projects is considered externally as a barrier for those countries who are either not aware of their real needs or are unable to articulate them in project proposals.

The Secretariat also needs to be more proactive with regard to the development and maintenance of its relationships both internal and external to the Secretariat. Internally, greater co-operation and a culture of openness are required both within and across the divisions of the Secretariat. The internal network can be just as important as those established externally due to the magnitude and diversity of the tourism sector, it being most unusual that any one individual is competent to address adequately all the different components that come together to make the tourism product. Outside of London, the Secretariat is recommended to co-operate more fully and openly with other international donor agencies and tourism bodies with the development of Memorandums of Understanding (MOU) with some of the key agencies a good place to start.

Actions Required:

1. To adopt a needs-driven approach the Secretariat is advised to conduct regional ‘needs’ assessments for the Caribbean, Southern Africa and Oceania, which will inform their proactive approach to project identification and selection albeit within the confines of the four designated areas of specific activity.
2. Conduct regular ‘needs’ updates via interviews, telephone contact and/or email correspondence with a panel of experts across the regions that will inform the proactive selection of projects.
3. Join forces with other trade missions conducted by Secretariat staff to conduct needs assessments more effectively and efficiently.
4. Clarify the process of project application and communicate to key stakeholders and governments.
5. Provide assistance where deemed necessary for those countries with a low success of gaining technical assistance (identified by completion of the needs assessment).
6. Explore benefits to be gained from the signing of MOU with key agencies such as the WTO and WTTC.
7. Regular attendance at regional conferences, key meetings and events
8. Improve internal and external communication via email, web site updates and personal communication where deemed necessary.

5.4.4 Priority 4: *Develop more effective ‘corporate’ communication*

Rationale:

Irrespective of the channel chosen for communication, improved communication of technical assistance both internally and externally is a highly desirable recommendation and one that would be universally appreciated by all member states, international donor agencies and tourism organisations. A common complaint from the interviews conducted externally as part of this study is that the Secretariat appears to work in a vacuum and is isolated in its approach. One excellent initiative is the proposal to arrange meetings of the CTC in accord with the dates and location of events held by the WTO. This ought to increase significantly participation rates. However, this is an initiative arising from the CTC rather than the Secretariat.

Actions Required:

1. The Secretariat is recommended to regain momentum and re-connect with key stakeholders and governments via regular and more focused communication as the external perception is that the Secretariat is attributing less importance to interventions in tourism than was previously the case.
2. Communicate the transparency of the application process to key stakeholders and recipient governments.
3. Disseminate internally and across divisions, examples of good practice via a quarterly publication that can also be used for external marketing purposes.

5.4.5 Priority 5: Seek Collaboration funding and partnership working**Rationale:**

The need to develop suitable networks is recommended to be taken further with the recommendation that the Secretariat seek collaborative funding and partnership working opportunities where best use can be made of its limited funds and human resource. In order to avoid duplication and be more cost effective, the Commonwealth Secretariat can adopt a variety of formal/informal collaborative stances (such as piggybacking) with other donor agencies and tourism organisations to maximise resource use and synergistic outcomes.

Before embarking on a defined path the Secretariat generally and SASD specifically need to establish clear lines of demarcation as to what its role and responsibilities are in relation to those to be agreed for the emerging CTC. Although Appendix 1 states quite clearly the roles and responsibilities of the CTC as yet it has not become fully operational so the debate is somewhat artificial. However, if the CTC is able to generate significant political and financial support one could conceivably question the validity of tourism interventions by both SASD and the CTC. This said, technical assistance provided by the Secretariat is acknowledged as providing sufficient comparative advantage in the marketplace for its future role to be maintained irrespective of the outputs of the CTC. A note of caution however relates to the internal dynamics and external perceptions of what the specific roles of the Secretariat are on the one hand and the role of the CTC on the other. There is a distinct danger that the two bodies overlap and to many external stakeholders, become one and the same. The Secretariat needs to act in a much more proactive manner in order to establish its strategic and operational relationship with the CTC.

More generally, working in partnership with other organisations will help to strengthen relationships and further promote and encourage the development of other partnerships. The rationale for forming such relationships is the influence and creation of networks that arise forming a consensus on the major issues facing the international community; in this instance in the domain of tourism. Developing partnerships with civil society organisations beyond the Commonwealth will also help to intensify the influence of its programmes.

Actions Required:

1. Seek collaborative opportunities with a range of other tourism-specific and more general agencies where the Secretariat can offer a unique proposition (i.e. access to governments).
2. Regular attendance at networking events either in person or via the use of other Commonwealth representatives to build networks and develop opportunities for further collaboration.
3. Determine clear roles and responsibilities between SASD and the CTC and communicate both internally and externally.

5.4.6 Priority 6: *Develop a culture of organisational openness***Rationale:**

The interconnected nature of tourism serves as a catalyst for a team with considerable breadth of experience as at the same time requiring a holistic overview of the sector. As such tourism expertise should be shared within and across divisions when the need arises in an open and constructive working environment. Although a priority that is relevant to the entire Secretariat, the need to develop a culture of organisational openness and transparency is to be recommended internally within the Secretariat as a vehicle to enhance the sharing of ideas and transfer of knowledge both within and across divisions. Evidence from interviews conducted internally and externally to the Secretariat suggests that the current organisational culture remains conservative and insular. Co-ordination among divisions is not always evident while there is a paucity of information sharing. Tourism with its extensive reach across so many industrial sectors requires expert input from a variety of individuals, departments and divisions and is not a sector that can easily be managed by a small number of individuals working in isolation. A culture that facilitates the cross-fertilisation of ideas and provides a platform for staff new to tourism to learn from previous experiences and interventions in tourism is to be welcomed.

Both internally and externally, the view from those interviewed in this study is that storage and retrieval mechanisms for information or knowledge accumulated over the years appears inadequate and insufficient to serve as a foundation for current and forthcoming projects undertaken by the Secretariat. A suitable knowledge and information management system is required that makes full use of the information at the Secretariat's disposal which can then feed into the implementation and planning of future projects. The Secretariat can also serve as the facilitator for the regional storage of information which may in the longer term provide the foundations for regional 'Think Tanks' on tourism.

Actions Required:

1. Appointment of a 'nodal' point of contact within SASD to serve as the focal point for issues pertaining to tourism.
2. Greater staff interaction and communication both within and across divisions as evidence from the interviews conducted for this study suggest that staff are working in isolation and not tapping into the full array of expertise available.
3. Organisation of regular informal staff meetings, brainstorming activity and divisional events to foster greater professional communication among staff.

4. Disseminate internally and across divisions, examples of good practice via a quarterly publication that can also be used for external marketing purposes.
5. Encourage staff to attend internal and external workshops, seminars and conferences specific to tourism.
6. Contribute to regional ‘Think Tanks’ and be more visible and taking an active lead in the dissemination of new ideas and techniques relevant to the management of tourism.

5.4.7 Priority 7: Develop a balance between regional and bilateral assistance

Rationale:

It is recommended that the Secretariat continue to adopt a balance between projects of a regional nature and those of a bilateral nature. In most instances there is room for both with all projects needing to be considered on a project-by-project basis. Any regional approach needs to be examined in depth to ensure that clear routes for dissemination exist. Although previous evaluation studies have suggested that more effective outcomes are often derived from bilateral technical assistance³ this is not always the view for tourism. That said, the CTO and RETOSA have proved to be worthy recipients of funds and have established highly effective networks and relationships among members. The suggestion is not that bilateral assistance be ignored, more that when compared to other sectors the institutions and structures within tourism may be more favourable to regional assistance.

Actions Required:

1. Undertake regular audits of the tourism ‘needs’ of the regions within the Commonwealth upon which the choice of projects to be funded can be made.
2. Identify, develop and maintain relationships with key regional organisations in addition to nurturing bi-lateral relations with key governments.
3. Continually monitor the benefits to be achieved from regional and/or bilateral assistance and interventions awarded both regionally and bilaterally.
4. Evaluate the expertise within existing regional structures to disseminate the outcomes of technical assistance across member states.

5.4.8 Priority 8: Enhance levels of local consultation in the setting of objectives and choice of experienced consultants

Rationale:

Greater clarity and transparency is required at the outset as to the development issues in the beneficiary countries. In particular, it is recommended that objectives are realistic and are achievable in the time scale and budget set. Project proposals should be accompanied with a detailed action plan that clearly states the critical elements and responsibilities of key individuals/parties at the outset. Local consultation ought also to take place with the selection of appropriate consultants. To achieve quality outputs experienced consultants are required who have the

³ Evaluation Studies No.s 58, 63, 65 and 66.

necessary region, country and/or sector-specific expertise. Although this may have implications vis-à-vis budgets it is clear from past experience that on a number of occasions inexperienced consultants have led to severe delays or even the non-completion of projects. This is designed to rectify historical problems with the choice of consultants such as with (G/SEY/093), (E/SDC/006) and (X/EAC/001).

Actions Required:

1. Conduct an internal and external audit of objectives set.
2. Appointment of an external panel of experts to review project proposals and provide impartial project and country-specific feedback and advice.
3. Develop and continually update and review an accredited list of consultants seeking references when consultants are to be appointed for the first time.

5.4.9 Priority 9: *Integrate monitoring and evaluation fully into projects*

Rationale:

One of the impediments to completion of the previous study was the difficulty in gaining a sufficient quantity and quality of responses from recipient governments. In this context it is recommended that monitoring and evaluation components are fully built in to all project proposals and clear funds ‘ring fenced’ to undertake such activity. Effective monitoring and evaluation should be a condition of receipt of funding in the first instance with non-completion serving as an impediment to further access to funding. To facilitate such an approach a regional or sector-specific project mentoring system should be instigated to hasten remedial action if deemed necessary. Mentoring ought to take place throughout the entire project and continue through to eventual implementation.

To facilitate improved monitoring and evaluation the Secretariat is recommended to become more proactive in proposing suitable methodologies, clarifying terminology, and establishing clear and unambiguous benchmarks at the outset with the agreement of the recipient countries.

Actions Required:

1. Integrate mechanisms and metrics for monitoring and evaluation in all project proposals and provide sufficient incentives for such activity to take place.
2. Insist upon monitoring and evaluation to be fully completed prior to further funds being accessed from the CFTC.
3. Make it a condition for receipt of funding that suitable project mentoring procedures are in place at the commencement of projects so remedial action can be taken if problems occur in the early stages of projects.
4. Establish at the outset suitable methodologies, metrics and benchmarks to be used for purposes of monitoring and evaluation.
5. To underpin future economic, environmental and socio-cultural impacts of technical assistance – and interventions more generally – develop a performance monitoring model and devise a mechanism to extrapolate the data necessary to undertake such a model from member states.
6. Consider seriously the use of academics and/or senior industry figures to serve as mentors/monitors for projects. This is a practice commonplace among many larger consulting companies where projects completed by

consultants are overseen by senior academics/industry specialists with expertise specific to the projects being completed. If resources allow, a permanent panel of experts is recommended as a vehicle to monitor developments within SASD vis-à-vis tourism and serve as an expert ‘sounding board’ for those conducting the technical assistance.

5.4.10 Priority 10: *Further commit to education and training*

Rationale:

That area where the Commonwealth can make a genuine impact locally, regionally and across the Commonwealth is in education and training. This is particularly so for local populations who across the Caribbean and Southern Africa are deemed to still not fully appreciate the benefits to be accrued from tourism. Problems of perceptions remain and are believed to hinder development especially of a sustainable nature. This can also be developed in partnership with the local industry and local/regional stakeholders. A commitment to education and training, the organisation of local workshops, study tours and conferences are likely to be cost effective initiatives that the Secretariat can do well. Such measures are anticipated to indirectly facilitate improved service quality.

Although appearing on the surface to be outside of the four strategic areas of expertise of SASD, this represents an opportunity for the Secretariat to train local organisations to undertake the work themselves in the future. Within the Commonwealth there is a whole host of academic and practitioner experience that the Secretariat can tap into and collectively enhance the knowledge and skill levels at the local level.

Actions Required:

1. Develop effective relationships with the many university departments across the Commonwealth and professional tourism bodies (such as the Tourism Society in the UK) who can facilitate and/or deliver quality cost-effective training and staff development across all regions of the Commonwealth.
2. Develop effective relationships with regional tourism organisations who are best placed to deliver regional training and staff development in association with the regional and local industries.

5.5 Other strategic issues

Although a more tangible tourism presence within SASD is deemed to be of benefit for the future delivery of interventions in the tourism industry it is accepted that the financial and human resource constraints are sufficient to warrant a more conservative approach for the foreseeable future. Clearly an ideal would be for the Secretariat to establish a designated Tourism Unit with expertise that covers the broad scope of activities that make up the tourism product. This would provide a sense of genuine focus for all tourism activity, both internal and external to the Secretariat. A specific unit would provide a holistic view, something that at present appears problematic due to the myriad of divisions and individuals with part-interests in tourism. The designated unit would also serve as an excellent external contact point and provide genuine networking opportunities and the potential for long-term relationship building with other agencies.

More realistic perhaps is the designation of a single contact point to be established for tourism-related projects, a post that ought to be communicated very clearly to member states, other international donor bodies and tourism organisations. A single point of contact is designed to avoid unnecessary overlap and duplication within the Secretariat. The Secretariat could also sub-contract elements of the designated unit with a number of universities within the Commonwealth suitably qualified to undertake such a task on a cost-effective basis.

Although contrary to the policy of SASD and the organisational mission of the Secretariat, a presence in the field is warmly received by beneficiaries and facilitates much stronger relational links and longer-term commitments. It is particularly useful in the regular monitoring of projects as does it serve as a useful means of screening, interviewing, and assessing prospective consultants. This could be established on either a country-by-country basis or regionally. One suggestion is that designate representatives of Commonwealth member governments already in residence in aid-recipient countries could serve as suitable field representatives. In particular, academic expertise exists in many Commonwealth countries with a large number of specialists frequently visiting many of the recipient countries. By not demonstrating a field presence the Secretariat is not always best place to monitor at close hand its own projects and able to grasp fully the local issues

5.6 Performance Monitoring

To monitor and evaluate fully interventions in tourism it is essential that a set of clearly defined targets and indicators are combined that reflect the intention of the intervention and evaluate its performance in achieving these objectives. The performance of interventions may be measured with respect to the effectiveness of the technical assistance regarding the achievement of various economic, environmental and/or socio-cultural targets. Each are discussed individually below.

5.6.1 Economic performance indicators

Economic performance indicators may vary in composition depending upon whether the intervention is at the micro or macro-level. Quite often at the micro-level the internal rate of return (IRR) on the investment is a primary target and monitoring variable. This enables the intervention to be assessed and compared against the opportunity cost of undertaking the investment. However, as one migrates towards public sector interventions the economic net of indicators widens to include the socio-economic impacts of the intervention where both tangible (e.g. IRR) and intangible returns (e.g. changes in the quality of life or risks to health and safety) are incorporated. At the macro-level (be it regional or national) the nature of the indicators can change significantly where changes in employment and income levels may be monitored along with foreign exchange flows and the inflow of Foreign Direct Investment (FDI) as a result of the intervention. Although the framework that might be invoked for each level of study may have significant commonality, the relative weighting attached to individual indicators at each level is likely to be location specific in order to capture the determined priorities associated with the intervention. It is also important to recognise that when indicators are used above the micro-level that they should incorporate the consequential effects (indirect and induced effects) associated with the intervention

as well as the direct effects. Therefore the indicators should reflect the impact of the intervention on all relevant sectors (not just tourism) in addition to those directly involved with the assistance.

5.6.2 Environmental performance indicators

Environmental performance indicators can be expressed in a variety of forms including economic costs (either the cost of prevention or the cost of remedy) and those less directly accessible that relate to the ‘quality’ of the environment which may be more subjective. The objective indicators are relatively straightforward and it is often surprising how much environmental data are available from different sources within a destination or a country. An example of acceptable environmental indicators where data are available for the majority of OECD countries is provided by the OECD where they describe the key environmental indicators to be related to pollution issues: climate change (CO₂ emission intensities – index of greenhouse gas emissions); ozone layer (indices of apparent consumption of ozone depleting substances (ODS); air quality (SO_x and NO_x emission intensities); waste generation (municipal waste generation intensities); and, freshwater quality (waste water treatment connection rates).

In terms of natural resources and assets the OECD list: freshwater resources (intensity of use of water resources); forest resources (intensity of use of forest resources); fish resources (intensity of use of fish resources); energy resources (intensity of energy use); and, biodiversity (threatened species). These indicators circumvent the problems associated with subjective indicators that relate to the ‘quality’ of developments but they could be added to by including variables such as: noise levels (based on % of population exposed to different levels of noise); marine biodiversity; and, land usage etc. It is particularly important when considering service-based industries such as tourism to include the indirect environmental impacts such as those relating to mining and quarrying, construction, transport etc. Tourism is an industry with a significant component of real estate development and it is important to capture the impacts of development and maintenance.

5.6.3 Socio-cultural performance indicators

It is much more difficult to assign objective indices to socio-cultural performance indicators. Variables such as language, religion, crime rates (theft, prostitution, drugs, etc), socially transmitted diseases, marriage breakdown, and unwanted pregnancies and so on can be used using locally collected statistics. However, the commodification of crafts, rituals and events are not easy to handle. It is sometimes questionable whether some of these ‘dilutions’ of culture would have been more secure in the absence of tourism development, indeed it could be argued that some would have disappeared much more rapidly without the development and demands of tourism.

5.6.4 Performance monitoring and the role of the Secretariat

At this juncture it is necessary to state that the data necessary to undertake effective and reliable monitoring of each of the above – and in particular the measurement of economic impacts – is substantial and requires specific expertise

in Input-Output Modelling and/or General Equilibrium Modelling. The completion of economic, environmental and socio-cultural impact assessments are also time-consuming and costly and as such it is advised that such activity be contracted out to specialists in the field. The Secretariat has provided technical assistance of this nature before (G/CTO/006) which was deemed to be a considerable success. It is however necessary for the Secretariat to be aware of the data requirements prior to the commencement of projects to facilitate the ease with which such impacts can be measured. In turn, it is recommended that the Secretariat consider the development of an effective in-house performance-monitoring model that can underpin future economic, environmental and socio-cultural impact assessments. Further discussion and proposed solutions to undertake composite performance monitoring are highlighted in Appendix 2.

More locally, the Secretariat is advised to develop a set of procedures to monitor the performance of external experts when undertaking funded projects. Problems of monitoring were identified in Section 3.4.3 and although it is accepted that much has changed in recent years regular reviews of internal monitoring procedures are recommended. In accord with the recommendations of Priority 9 (Section 5.4.9) where internal expertise is unavailable the appointment of senior academic/industry specialists is advised to evaluate what in effect are highly specialised techniques. On all occasions, feedback and all communication should be through the nodal point of contact within SASD as recommended in Priority 6 (Section 5.4.6). If resources allow, a permanent 'independent' panel of experts is recommended to oversee the interventions funded by the Secretariat. Quarterly meetings of the panel would be sufficient to monitor developments within SASD vis-à-vis tourism and serve as an expert 'sounding board' for those conducting the technical assistance (Priority 9, Section 5.4.9). This approach is preferable to the detailed collection of monitoring data during the development of master plans, marketing and human resource plans, which is always in danger of turning into a 'tick box' task with limited benefits to the sponsor. The expertise required is available within the Commonwealth, the author of this report happy to nominate suitably qualified individuals if so required.

6.0 CONCLUSION AND SUMMARY RECOMMENDATIONS

Although this study is focused specifically on the Secretariat's interventions in tourism the first conclusion to be drawn is that many of the outcomes relate to organisational issues that can be applied to the Commonwealth Secretariat in its entirety. A number of previous evaluations have drawn similar conclusions of a positive and negative nature. For example, longstanding problems appear to relate to issues of the appointment of suitably qualified consultants and the development of information storage and retrieval mechanisms. In addition, issues pertaining to improved internal co-operation and greater openness and transparency in the work of the divisions, and the need to raise the profile of the Secretariat as an international development agency are evident in other evaluation studies conducted independently by individuals and organisations external to the Secretariat.

However, there are a number of important conclusions to be drawn from this study specific to the Secretariat's interventions in the tourism sector. These can be summarised as follows:

1. Tourism is a major activity for many countries within the Commonwealth and represents a sector that delivers considerable economic development and foreign exchange earnings. In addition, it offers considerable potential for further job creation, income distribution and balanced regional development. As a major industrial activity, tourism continues to warrant interventions from the Commonwealth Secretariat.
2. As the primary intergovernmental organisation within the Commonwealth Association, the Commonwealth Secretariat remains in pole position to take an active lead in the development of tourism across its member countries with SASD that division to remain the principal point of contact for future interventions.
3. The majority of previous interventions in the tourism sector have been a success with a number of positive outcomes achieved. Although this report identified areas for improvement it advocates continuing with the CFTC as the principal modality of delivery.
4. Based on a thorough evaluation of previous interventions in tourism and a synthesis of views of external stakeholders and other international donor agencies, the Secretariat is considered to have a particular comparative advantage in tourism interventions in a number of areas. The Secretariat is considered to:
 - Be truly international in its outlook while demonstrating excellent 'broad' local knowledge;
 - Be credible, reliable, independent and 'politically' neutral;
 - Be generally responsive to innovative 'demand-led' projects (despite reservations about transparency about the application process);
 - Have had a long-term involvement in the domain of tourism and thus ought to contain significant accumulated knowledge;
 - Demonstrate considerable affinity and trust with its member states;
 - Be a credible catalyst for the raising of additional financial resources from other international donor agencies;
 - Serve as a vehicle to shared-funding opportunities and further collaboration;
 - Offer good quality, cost effective technical assistance;
 - Be flexible with a suitably quick speed of response with regard to the allocation of funds;
 - Understand the culture of recipient governments and organisations;
 - Have the ability to conduct effective institutional strengthening due to its close working relations with tourist organisations around the Commonwealth.
5. In view of its internal and externally considered strengths and areas of comparative advantage and those many issues impacting on the future direction of tourism, the Secretariat is advised to continue with its strategic approach to interventions and existing focus on four specific areas of expertise, namely the development of: Tourism Master Plans; Tourism Marketing Strategies and Plans; and, Tourism Human Resource Plans.
6. Among all those issues identified as impacting on the future development of tourism the Secretariat is advised to:

- Continue to encourage the development of tourism although for those countries with already high levels of dependency encourage them to seek more sustainable, local solutions and levels of ownership. At the same time they should be encouraged to seek alternative sources of economic development;
 - Encourage destinations with mature markets (such as the Caribbean and parts of Oceania) to seek new markets (intra-Commonwealth travel) and identify new product development opportunities;
 - Develop/maintain regular dialogue with the financial services sector, host communities, and local and regional media outlets, to communicate more robustly the economic benefits to be derived from tourism;
 - Stress the importance of ‘quality’ data to recipients of funding as a means to underpin effective decision making and as a condition upon receipt of future technical assistance;
 - Revisit existing institutional structures (locally and regionally) and review their appropriateness for implementing the master plans, marketing strategies and human resource plans delivered via technical assistance.
7. To improve its overall focus and provision of interventions in the tourism sector the Secretariat is advised to address a number of strategic priorities. In order of priority, the Secretariat is advised to:
- Continue with interventions in the tourism industry;
 - Maintain strategic focus and funding;
 - Develop a proactive and network-driven orientation;
 - Develop more effective corporate communication;
 - Seek collaboration funding and partnership working;
 - Develop a culture of organisational openness;
 - Develop a balance between regional and bilateral assistance;
 - Enhance levels of local consultation in the setting of objectives and choice of experienced consultants;
 - Integrate monitoring and evaluation fully into projects;
 - Further commit to education and training.
8. Although a number of issues were identified in the study relating to monitoring and evaluation at a macro level, more locally the Secretariat is advised to develop a set of procedures to monitor the performance of external experts when undertaking funded projects. Where internal expertise is unavailable the appointment of senior academic/industry specialists is advised with feedback and all communication to be channelled through a nodal point of contact within SASD. Finally, a permanent ‘independent’ panel of experts is recommended to oversee interventions funded by the Secretariat.

7.0 KEY PUBLICATIONS AND ORGANISATIONAL CONTACTS

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Organisational contacts

| <i>Commonwealth Secretariat</i> | <i>Role & Division</i> | <i>Date</i> |
|---------------------------------|--|-------------------------|
| Ms Angela Strachan | Trade Adviser, SASD | 11 May and 17 June 2005 |
| Ms Pauline Campbell | Programme Officer, SASD | 11 May 2005 |
| Mr Ivan Mbirimi | Economic Adviser, EAD | 11 May 2005 |
| Ms Taboka Nkhwa | Adviser & Head of Section, Africa Region, GIDD | 26 May 2005 |
| Ms Janet Strachan | Economic Adviser, EAD | 26 May 2005 |
| Dr Indrajit Coomeraswamy | Director, EAD | 26 May 2005 |
| Mr Tyson Mason | Evaluation Officer, SPED | 17 June 2005 |
| Dr Elizabeth Brouwer | Deputy Director, SPED | 17 June 2005 |
| Mr Nikhil Treebhoojhun | Adviser & Head, Trade Section, SASD | 17 June 2005 |
| Mrs Chandah Chellah | Trade Adviser, SASD | 17 June 2005 |
| <i>Caribbean Region</i> | <i>Role & Organisation</i> | <i>Date</i> |
| Mr Luther Miller | Director of Finance and Resource Management, Caribbean Tourism Organization | 17 May 2005 |
| Ms Sue Springer | Executive Director, Barbados Hotel and Tourism Association | 17 May 2005 |
| Mr Darcy Boyce | Chief Executive Officer, Barbados Tourism Investment Inc. | 17 May 2005 |
| Mr Oliver Jordan | Managing Director Barbados and Director, Corporate Banking (South Caribbean), First Caribbean International Bank | 18 May 2005 |
| Mr Clairvair O. Squires | Portfolio Manager, Caribbean Development Bank | 18 May 2005 |

| | | |
|---|--|--------------|
| Mr Andrew F. Cox | Permanent Secretary (Tourism), Government of Barbados – Ministry of Tourism and International Transport | 19 May 2005 |
| Ms. Francia Jordan | Chief Research Officer, Government of Barbados – Ministry of Tourism and International Transport | 19 May 2005 |
| Mr Seibert Frederick, | Director, Research and Planning Unit, Government of Barbados – Ministry of Finance and Economic Affairs | 19 May 2005 |
| Mr Neville McFarlane | Senior Economist, Government of Barbados – Ministry of Finance and Economic Affairs | 19 May 2005 |
| Mr Stuart Layne | President and Chief Executive Officer, Barbados Tourism Authority | 20 May 2005 |
| <i>Southern African Region</i> | <i>Role & Organisation</i> | <i>Date</i> |
| Mr Shepherd Nyaruwata | Executive Director, Regional Tourism Organization of Southern Africa | 3 June 2005 |
| Mr Francis Mfune | Market Research & Promotions Manager | 3 June 2005 |
| Mrs Paula van Dyk | Deputy Director, International Development Co-operation | 6 June 2005 |
| <i>International Donor Agencies</i> | <i>Role & Organisation</i> | |
| Dr Hash Varma | Chief, Department of Technical Co- operation, World Tourism Organization | 8 June 2005 |
| Ms Olivia Ruggles-Brise | Policy & Communications Co- ordinator, World Travel & Tourism Council | 15 June 2005 |
| Mr Mathieu Hoeberigs | Principal Administrator, Tourism Unit, European Union | 15 June 2005 |

8.0 APPENDICES

APPENDIX 1: Commonwealth Tourism Centre

APPENDIX 2: Composite Performance Monitoring

**APPENDIX 3: Audit of Projects Implemented in the Tourism Sector
(1995 – 2002)**

APPENDIX 1: Commonwealth Tourism Centre

The mission for the CTC is as follows:

- To serve as a promotion centre for intra-Commonwealth sustainable tourism and undertake activities to vitalize greater travel among Commonwealth member countries as well as to promote greater tourist traffic from countries outside the Commonwealth through close co-operation and sharing experience of best practice.
- To promote intra-Commonwealth and other tourism investment.

Its designated strategic objectives are to:

- Establish the CTC as a self-sustaining entity within 3 years;
- Increase awareness of Commonwealth countries as tourism destinations, including through expanding access to non-traditional source markets;
- Facilitate information exchange and (create a suitable framework) to establish a tourism market information system which adds value to existing initiatives;
- Develop promotional and publicity material and facilitate joint marketing programmes;
- Promote tourism investment in the Commonwealth by targeting investment promotion activity and matching investors and project sponsors;
- Facilitate exchange of views on best practice within the Commonwealth, particularly on improving quality of services and training;
- Develop strategic partnerships, particularly between the public and private sector.

Its scope of activities is to:

- Formulate a resource mobilisation and business plan which emphasizes the commercial value, and long-term sustainability, of the CTC;
- Create an information data base and co-ordinate an information exchange network relating to tourism and source markets in the Commonwealth;
- Enhance awareness about tourist attractions of member countries of the Commonwealth;
- Support marketing of Commonwealth destinations through the exchange of expertise and technical support;
- Undertake analysis of the tourism resources and potential investment opportunities of the Commonwealth member countries as well as issues related to effective transport services and infrastructure;
- Mobilise and facilitate intra-Commonwealth tourism investment projects through collaboration with relevant financial institutions;
- Maintain close rapport with the mass media and provide active public relations and publicity support on tourism both within and outside the Commonwealth;
- Liaise and co-ordinate with other tourism entities on related activities and establish closer working relationships with WTO, WTTC and the private sector in the promotion of Commonwealth tourism.

APPENDIX 2: Composite Performance Monitoring

In order to monitor and evaluate fully the effectiveness of tourism interventions it is necessary to take a more comprehensive approach to assessment indicators. Some forms of tourist activities perform better than others in each of the different areas where performance could be measured. Therefore it is important that: (a) a comprehensive range of indicators are used; and (b), that they are examined in a common framework that facilitates the comparison of the intervention with alternative developments and indeed, alternative industries.

One such attempt is the development of environmental and socio-cultural matrices that can be incorporated into the economic performance indicator models, such as Input-Output Models (IOMs) and Tourism Satellite Accounts (TSAs). Bournemouth University pioneered such a model in the early 1990s when a model was constructed for the Government of Mauritius. This model included the calculation of standard macro-economic performance indicators such as income, output, employment, government revenue and foreign exchange flows as well as indicators that demonstrated greenhouse gas production, acid rain precursors and biodiversity indicators. Similar models were constructed for the governments of Bonaire, St Lucia and the Wales Tourist Board. An example of the sort of data available from such models is shown below.

| N.Ireland | 1999 | EXPENDITURE RESULTS | | | TYPE II | | RETURN TO MAIN MENU |
|-----------------------------------|-------------------|------------------------------|------------|----------------|---------------------------|---------|---------------------|
| SECTOR | N.Ireland | INCOME | | N.Ireland | MULTIPLIERS | | |
| | | DIRECT | DIR+INDIR. | DIR+INDIR+INDU | INCOME | | |
| Agriculture and Extraction | 174 | | | | | | |
| Food, Drink, Tob | 1,425 | 51,398 | 60,175 | 69,466 | 1.35 | | |
| Textiles, Wood, Publishing | 483 | EMPLOYMENT (FTEs) | | | EMPLOYMENT | | |
| Chemicals, Plastics, Glass | 847 | 5 | 5 | 6 | 1.24 | | |
| Metals, Machinery, Vehicles, Othe | 299 | OUTPUT | | | OUTPUT | | |
| Energy & Water | 594 | 140,027 | 175,628 | 205,272 | 1.47 | | |
| Construction | 273 | GOVERNMENT REVENUE | | | GOV. REV. | | |
| Retail, Wholesale, Repairs | 27,871 | 9,911 | 12,509 | 20,293 | 2.05 | | |
| Large Hotels (10+ employees) | 19,603 | IMPORTS | | | IMPORTS | | |
| Other Hotels | 5,216 | 30,736 | 38,275 | 63,207 | 2.06 | | |
| B&B, Guest Houses | 13,644 | ENVIRONMENTAL IMPACTS | | | | | |
| Self Catering & Holiday Parks | 7,782 | GREENHOUSE GASES | | | NH₃ | | |
| Caravan and Camping | 8,178 | 20,565,314 | 51,820,550 | 64,815,564 | 1,675 | 13,982 | 17,025 |
| Restaurants, Bars etc | 28,894 | ACID RAIN PRECURSORS | | | BLACK SMOKE | | |
| Transport | 3,119 | 128,351 | 519,560 | 668,031 | 18,676 | 30,996 | 40,549 |
| Finance, Business Services etc | 9,642 | CO₂ | | | NMVOC | | |
| Public Admin, Education, Health | 3,413 | 19,908,345 | 47,773,271 | 59,764,086 | 65,036 | 122,984 | 156,351 |
| Recreation | 705 | CH₄ | | | BENZENE | | |
| Tourist Attractions & Museums | 7,074 | 120,666 | 300,130 | 493,633 | 2,474 | 3,091 | 3,736 |
| Other Services | 792 | N₂O | | | CO | | |
| Imports | 35,402 | 1,113 | 4,256 | 5,832 | 152,723 | 238,852 | 292,160 |
| Tax | 24,536 | SO₂ | | | LEAD (tonnes) | | |
| TOTAL | 199,966 | 62,415 | 342,728 | 450,532 | 66,067 | 92,947 | 124,110 |
| ARRIVALS | 500 | NOX | | | ENERGY & WATER | | |
| out of | | 95,173 | 214,258 | 265,849 | 4,143 | 5,150 | 6,795 |
| TOTAL ARRIVALS | 11,796,740 | | | | | | |

The first two columns show the sectors of the economy and the expenditure of tourists (in this instance from Northern Ireland) in each sector. The last two entries show the number of tourists (again in this instance from Northern Ireland) out of the total number of tourist arrivals for this year (the example is set in 1999). The upper half of the next three columns shows the impact of that pattern and volume of spending on the direct, indirect and induced levels of income,

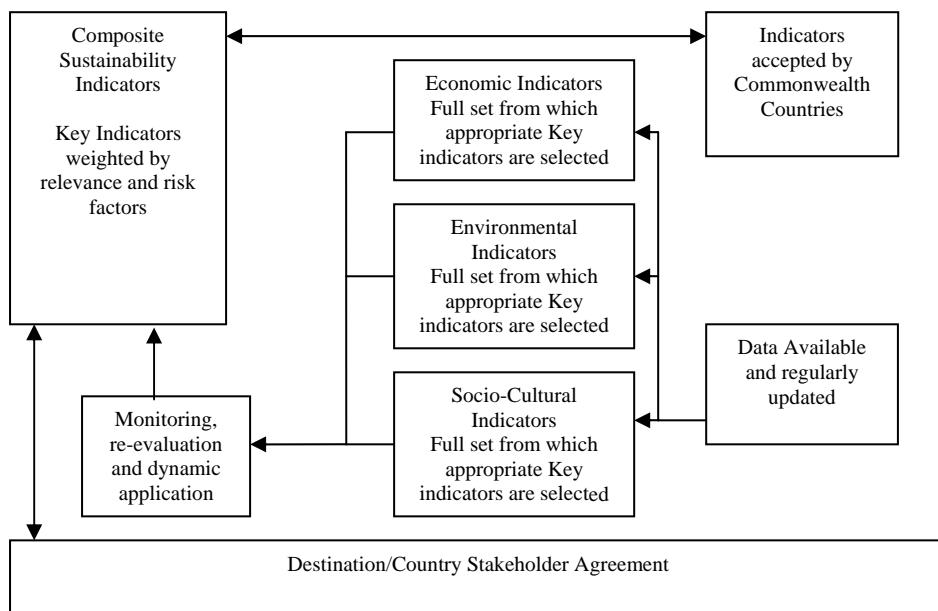
employment, output, government revenue and imports. To the right of these cells the impacts are converted into Type II multipliers for use with development banks and international agencies who often prefer to work with these performance indicators rather than the unorthodox multipliers commonly used. The lower half of this quadrant (shaded in green) shows the production of greenhouse gases, acid rain precursors, energy and water usage plus a host of other environmental indicators. Being constructed within a single framework the model allows comparison of different forms of tourism activity, tourism interventions and alternative uses of scarce resources.

With respect to indicators such as income and employment generation it is also important to establish whether the income and jobs generated are local or whether or not they are 'imported'. This can be achieved by appropriate construction of the model where a distinction is made between local and non-local employment. However, crude indicators can be more cheaply constructed that weights impacts by the percentage of local utilisation. Such models can demonstrate the performance of tourist interventions to a destination as a whole but have problems in trying to estimate the risks attached to the different stakeholders. This latter aspect would need to be incorporated using additional matrices and would most likely make the construction of such models particularly costly.

Other attempts at providing performance indicators relating to tourism include the Tour Operators' Initiative, a scheme endorsed by the Rainforest Alliance. The scheme is sector specific in that it identifies the importance of tour operators in the tourism development process and so attaches specific indicators to: product management and development (including types of activities and locations); internal management (includes operational aspects, purchasing, employment etc); supply chain management (includes looking at the location and sustainability of suppliers); customer relations (quality of service and awareness of sustainability issues); and, co-operation with destinations (mainly through opening dialogue to engage stakeholders within destinations). Few have attempted to incorporate a rigorous inclusion of comprehensive socio-cultural indicators within a generalised framework. A possible framework is advocated below.

The below framework requires agreement between the various stakeholders and the national governments on several levels. First the appropriateness, rigour and general acceptability of the economic, environmental and socio-cultural indicators must be accepted between the private and public sector stakeholders within the destination. These indicators need to be based on a robust analytical platform where the relationship between the indicator and the objective(s) is clear. They must also be cost-effective in the sense that the data are available (or can be acquired relatively inexpensively) and can be regularly updated. From a full set of possible performance indicators a key set of indicators should be selected while the performance monitoring and weightings (priorities) should then be assigned to each of these key indicators. This, of course, means that the relative weightings should also be agreed by stakeholders.

A possible framework



Finally, for the monitoring of tourism interventions to be successful it is important that the performance indicators are transferable from destination to destination or country to country. This would require agreement between Commonwealth countries on the appropriate performance indicators and how the weightings assigned to each indicator is derived (and how they may vary to reflect the different needs of destinations and countries).

Possible performance indicators

Indicators chosen may be done so to monitor the positive effectiveness of the intervention or the reduction in negative aspects of tourism which occur as a result. Although the indicator overview provided in the previous section treated each of the three sets of indicators in isolation, in reality there is some overlap where, say, economic indicators may also reflect socio-cultural performance indicators. Examples of this can be found in, say, income and employment indicators where the indicators are geared to the proportion of local income and employment associated with any intervention. However, this is only the tip of the iceberg. In an ideal world one would want to weight the income that was generated by the intervention by the proportion of local income acquired but then take away any loss in local income caused by displacements associated with the intervention. The construction of new facilities may attract business away from existing facilities and this should be deducted from the income generated. The final figure should then be compared with the next best alternative use of the intervention to see if the end result is still positive. The compounding of indicators in this way increases the data requirements and makes the indicators more complex. The trade off between clarity and ready availability versus a robust analytical platform may favour the more simple approach until such time that all areas have general equilibrium models that can produce these data.

For a specific tourism intervention the process of monitoring and evaluation would presumably run through a set of criteria where the appropriate key indicators were selected from a full set of economic, environmental and socio-cultural indicators.

These would then be weighted according to their appropriateness for the intervention and the priorities of the stakeholders. These could then provide a set of 'agreed' performance indicators.

The above represents a broad framework to measure the effectiveness of tourism intervention in Commonwealth countries. In order to create as much flexibility as possible in the framework it may be appropriate to create subsets within which allow for more specific monitoring of performance by the type of intervention being evaluated. Again it would be necessary to seek agreement between stakeholders on these subsets. Finally it is not enough to simply set, measure, and monitor performance indicators. It is also important to cast each indicator within a temporal framework so that targets are met within a specified time frame and to also assign responsibilities for each indicator.

Appendix 3:

**Audit of Projects Implemented in the
Tourism Sector (1995-2002)**

| Project Title: | Project Objective: | ComSec Grant Funding | Issues Arising: |
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| Development of Sustainable Tourism, Bahamas (X/BAH/016) EIDD | | | <ul style="list-style-type: none"> • Project completed but no further details available. |
| Development of Tourism Services in St Kitts and Nevis (X/STK/A023) EIDD | To provide advice and an Action Plan for the development of Tourism sites and services in Nevis. | GBP 48,000 | <ul style="list-style-type: none"> • Project completed but no specific dates available. • Secretariat initially chosen due to its sensitivity to government constraints, the low cost of its assistance and the fact that expertise was not available locally. • Overall, Secretariat assistance was considered to be significant vis-à-vis meeting the terms of reference, augmenting capacity and contributing to the transfer of knowledge. • Future assistance required in all areas of tourism. |
| Tourism Marketing Adviser, St Vincent and the Grenadines (G/STV/030) GTASD | To design and implement a tourism marketing strategy for St Vincent and the Grenadines. | GBP 134,913 | <ul style="list-style-type: none"> • Project commenced 01/96 and was completed 07/98 after two extensions. • Reasons for choosing Secretariat assistance: sensitivity to government constraints; low cost of assistance and expertise not available locally. The Secretariats reputation for quality and its co-operative approach were also noted. • Overall impact of assistance was deemed to be moderate. • Areas requiring further assistance considered to be in the domains of marketing and sector planning vis-à-vis augmentation of capacity and knowledge transfer. |

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| <p>Adviser, Tourism Strategy and Planning, Trinidad and Tobago (G/TRI/060)</p> <p>GTASD</p> | <p>To assist the Trinidad and Tobago Hotels and Tourism Association with policy and programme development.</p> | <p>GBP 41,710</p> | <ul style="list-style-type: none"> • Commenced 05/97 and completed 11/97 after the addition of a Phase II from the Government of Trinidad and Tobago for further work. • Led to the development of a promotional and marketing strategy. • Problems encountered with the follow-up and implementation of the actual recommendations. • Commonwealth Secretariat support deemed to be effective. • Secretariat initially selected due to its reputation for quality, its speed of response, understanding of the region, sensitivity to government constraints and its co-operative approach. It is acknowledged however that assistance was not available from other sources. • Future assistance required across the full range of tourism activities. |
| <p>An Investment, Trade and Tourism Promotion Programme to the Far East, Kenya (X/KEN/044)</p> <p>EIDD</p> | <p>To identify new sources of tourists for Kenya, export outlets for selected Kenyan goods, and new sources of raw materials for the manufacturing sector.</p> | <p>GBP 180,000</p> | <ul style="list-style-type: none"> • This project was adversely affected by the collapse of the Far Eastern economies, weather and publicity on human rights. However, export outlets were identified and negotiations were held with tour operators in well-attended seminars. |

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| <p>Tourism Adviser, Ministry of Tourism and Transport, Seychelles (G/SEY/093)</p> <p>GTASD</p> | <p>The provision of a long-term expert to finalise a 10 Year Draft Tourism Development Plan.</p> | <p>GBP 118,000</p> | <ul style="list-style-type: none"> • Initial plan had been developed with the assistance of other sources. • Project commenced 03/96 and eventually was completed in 07/98. • Severe problems experienced with the identification of twelve suitable consultants to complete the project. This took up to 80% of the allocated time for the project. In the end, two of the consultants failed to submit their findings and the draft plan was not completed even after a 6-month extension. • Rather than one comprehensive plan various sectoral reports were produced which indirectly fed into <i>Vision 21: Tourism Development in Seychelles 2001-2010</i>, the document which continues to shape tourism in the country. • Role of Commonwealth Secretariat considered to be very good/good especially with regard to complementing and enhancing limited national capacities. • Secretariat initially chosen due to its specialist understanding of the region, its sensitivity to government constraints, co-operative approach, and the fact that expertise was not available locally. • Better monitoring at the outset of this project would have contributed to better outcomes although if judged against new/modified terms of reference then the project would have been deemed to be more successful. • Further assistance required across the full spectrum of tourism activities. • Particular assistance required with the development of a TSA. |
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| <p>Intra-Regional Tourism Market Survey - SADC (E/SDC/006)</p> <p>EIDD</p> | <p>To identify promotional requirements, activities and strategies that would enhance intra-regional tourism between SADC countries.</p> | <p>GBP 57,000</p> | <ul style="list-style-type: none"> • Project was deemed to be a success despite the fact it took nearly 4 years to find suitable consultants. • Before the project commenced an EU-funded project concluded that further research into intra-regional travel in the region was unnecessary. • Recommendations from this project included the need to maintain an in-country presence to identify suitable consultants, to better monitor the implementation of projects and co-ordinate Secretariat programmes better with other donors. |
| <p>Legal Expert to Assist SADC to Develop Tourism Protocols for Regional Integration and Community Building (E/SDC/009)</p> <p>EIDD</p> | <p>To assist SADC in developing protocols of co-operation in the tourism sector. The protocols were expected to facilitate regional integration and co-operation, a regional approach to sector planning and promote the harmonisation of sector policies, programmes and projects.</p> | <p>GBP 26,100</p> | <ul style="list-style-type: none"> • Project commenced 07/96 and was completed 09/96 but no further details available although outcomes led to the formation of RETOSA. • Further assistance required across the full spectrum of tourism activities. • Grant funding and technical assistance sought from a variety of other agencies including USAid, EU, Development Bank of South Africa, UN (SADC Secretariat), GTZ (Secretariat) and JICA of Japan. |

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| <p>Liberalisation of Tourism Towards a Single Market and Development of a Strategy for Joint Tourism Promotion – East Africa (X/EAC/001 and 002) EIDD</p> | <p>To implement the findings of the study which looked at a regional approach to tourism promotion and co-ordination in East Africa including developing consensus on sensitive issues especially in joint promotion of tourism.</p> | <p>GBP 54,600 Or GBP 87,780</p> | <ul style="list-style-type: none"> • The East African Tourism Council was formed to advance the project. • Project generated by the Commission for East African Co-operation (CEAC). • Phase I commenced 06/07 but not completed until 03/99 (originally planned to last 3.5 months). • Poor feedback vis-à-vis the consultant company Economic Research Associates UK. Problems explained by over-concentration on UK-based desk research and insufficient contact made with a broad range of stakeholders in the field. Consultants considered to have limited knowledge of issues pertinent to the region. • Many issues identified in the terms of reference were not addressed (i.e. cost benefit analysis), the report was considered to be very descriptive with limited analysis and a presentation of the findings was never given. • Some positive outcomes were delivered e.g. the classification and standardisation of restaurants and hotels in the region, and the formation of the East African Tourism Council. • Gender issues had been taken on board in the implementation of this project. • Secretariat initially chosen due to its specialist understanding of the region and its sensitivity to government constraints. • Further assistance required in all aspects of tourism. |
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| <p>Tourism Promotion Master Brochure, SADC (X/SDC/008)</p> <p>EIDD</p> | <p>To design and produce a Tourism Master Brochure for promotion of the SADC region as a tourist destination.</p> | <p>GBP 30,000</p> | <ul style="list-style-type: none"> • Difficulty sourcing suitable consultants. • Consultant selected 8/95, project commenced 12/95 and completed 8/00 (originally planned to last four months). • Regional consulting firm appointed failed to deliver. • Project was completed jointly by RETOSA and EIDD. • Relationship with Commonwealth Secretariat was considered to be very positive. |
| <p>Development of a Tourism Marketing Plan and Strategy and Tourism Promotion Programme for SADC (X/SDC/010)</p> <p>EIDD</p> | <p>To provide technical assistance for market research and the promotion of SADC in North America.</p> | <p>GBP 65,000</p> | <ul style="list-style-type: none"> • Deloitte and Touche appointed to undertake this project which was completed to a high level of satisfaction by RETOSA. • Consultants had consulted extensively with key stakeholders in most SADC countries. • Report included detailed action points to facilitate implementation. • A number of problems identified within SADC however that severely hampered the progress of the consultants. • Role of Commonwealth Secretariat considered to be very good. |
| <p>Tourism Marketing and Development Adviser for Nevis Administration, St Kitts and Nevis (E/SKN/022)</p> <p>EIDD</p> | <p>To provide tourism marketing and development advice to the Nevis Administration in the State of St Kitts and Nevis.</p> | <p>GBP 27,500</p> | <ul style="list-style-type: none"> • Project completed October 2003 to a very high level of satisfaction principally as a result of the selection of a highly competent consultant. • High satisfaction recorded with the contribution of the Secretariat. |

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| <p>Consultant in Tourism Economic Assessment, British Virgin Islands (B/RLL/040)</p> <p>GTASD</p> | <p>To assist in setting up an economic impact model for the Tourism sector.</p> | <p>GBP 30,000</p> | <ul style="list-style-type: none"> • Although indicated as ‘completed’ in the project files of the Secretariat, feedback from the initial audit of tourism projects indicates that the project was never fully completed. Contrasting information suggests however that the project commenced in 03/97 and was completed 07/98. • Feedback from questionnaire completed in the original audit suggests that the results delivered were not in keeping with the terms of reference. This was explained by the fact that the consultant was not able to collect the required input data with very little time actually spent in BVI working on the project. • Supervision and general monitoring conducted by the Secretariat was deemed to be unsatisfactory. • CFTC funds were deemed to have been wasted as a successful EU-funded project which followed was deemed to be a success with the results being used to set policy in the country. • Secretariat was initially chosen due to its reputation for quality, its speed of response and overall degree of flexibility, and the fact that assistance was not forthcoming from elsewhere. |
| <p>Tourism Statistics Adviser, Caribbean Tourism Organization (G/CTO/006)</p> <p>GTASD</p> | <p>Provision of a Tourism Statistical Adviser to be based at CTO for one year originally.</p> | <p>GBP 186,693</p> | <ul style="list-style-type: none"> • Satisfactory completion of project 12/06. • Commonwealth Secretariat support generally considered to be very good/good. • Secretariat initially chosen due to its reputation for speed of response and flexibility, understanding of the region, and its co-operative approach. • All areas of activity can benefit from Secretariat assistance. |

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| <p>Tourism Institutional Building and Market Development, Lesotho (X/LES/024)</p> <p>EIDD</p> | <p>To achieve higher standard of tourism management at institutional and ministerial levels and to evaluate and analyse the potential of Lesotho as a destination. Finally, to determine tour operators that Lesotho can link up with.</p> | <ul style="list-style-type: none"> • GBP 112,150 | <ul style="list-style-type: none"> • Project completed 03/98 to a high standard. • Different consultants used for separate phases of the project. • Marketing plan was however never implemented because the tourist board became defunct shortly after the project was completed. This situation may now have changed. • WTO provided technical assistance in tourism policy development in 99/00. • Commonwealth Secretariat assistance considered as highly effective and beneficial. • Secretariat initially selected due to its reputation for quality, its understanding of the region, sensitivity to government constraints, its co-operative approach and the fact that expertise was not available locally. |
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| Current Projects / Projects in Development Pipeline | | | |
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| Tourism Adviser, Tonga Visitors Bureau (G/TON/075) GTASD | To encourage new product development and product improvements for existing businesses and investment in new facilities and equipment. | GBP 106,370 | <ul style="list-style-type: none"> • Project details uncertain/project ongoing. |
| Adviser, Tourism Development Authority, St Kitts and Nevis (G/STK/051) GTASD | To identify strategies to enhance the tourism product and also raise government revenue. | GBP 63,900 | <ul style="list-style-type: none"> • Project details uncertain. • To what extent is this project different to (E/SKN/022) conducted by EIDD? |

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| <p>Tourism Regional Capacity Building, Caribbean (X/CTO/003) EIDD</p> | <p>To assist the Caribbean region improves the quality of its tourism product.</p> | <p>GBP 140,000</p> | <ul style="list-style-type: none"> • Project to be achieved by strengthening the institutional capabilities of regional industry training programmes to enhance the quality of service delivery at the technical and professional levels. • Phase II involves the development of best practices in training and human resource planning from customer-driven industry leaders in the region. • No further details available. |
| <p>Tourism Institution Building and Market Development, Ghana (X/GHA/032) EIDD</p> | | | <ul style="list-style-type: none"> • Other than the project objectives, no further details are available. <p>Objectives identified as:</p> <ul style="list-style-type: none"> • To improve destination management through a planned approach and promotional campaign with innovative programmes in different targeted core markets. • To promote events and conference tourism and forge closer collaboration with regional markets, improvement of attraction sites and customer delivery service. • To promote Ghana's image as a prime cultural tourism destination. • To improve destination management. • To adopt a planned approach to destination management. • To develop and maintain good working relationships between operators. • To improve attraction sites, and product perception campaign through innovative programmes for different markets. |

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| <p>Tourism Promotion Programme in North America for SADC (X/SDC/055)</p> <p>EIDD</p> | <p>To develop a tourism promotion programme in North America for SADC.</p> | <p>GBP 121,170</p> | <ul style="list-style-type: none"> • Project included a study of outbound visitors and was expected to recommend opportunities for the SADC region to improve tourist flow into SADC from North America and to assess the region's competitiveness vis-à-vis other regions and develop a strategy for SADC. • As part of the project, the consultants were expected to accompany a business mission of tour operators to North America and assist with the development of long-term business relations. • Projected completed end 2002? |
| <p>Tourism Institutional Development and Marketing Plan, Cameroon (X/CAM/002)</p> <p>EIDD</p> | | | <ul style="list-style-type: none"> • Objectives a part, no further details are available. <p>Objectives identified as:</p> <ul style="list-style-type: none"> • To improve the destination image and strengthen Cameroon's competitiveness in the field of tourism. • Enhance the skill levels of tourism officials to facilitate the use of current technologies in the tourism industry. • Promote market research activities. • Stimulate tourism culture in Cameroon. • Strengthen institutional support capacity of the industry. • Enhancing a positive image for tourism promotion in Cameroon. |
| <p>Jamaica Tourism Master Plan 1998 – 2007 (X/JAM/A050)</p> <p>EIDD</p> | <p>To prepare a Master Plan for Development of Tourism in Jamaica with an Action Plan for implementation.</p> | | <ul style="list-style-type: none"> • No details available. |

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| G/VAN/047 Vanuatu | Consultant Tourism Master Plan Review | GBP 47,000 | <ul style="list-style-type: none"> • No project details available. |
| Technical Support for Commonwealth Tourism Ministers Meeting (BCWG157) EAD | | | <ul style="list-style-type: none"> • No details available. |

GTASD is now part of GIDD while EIDD is now a part of SASD.