



COMMONWEALTH POLICY STUDIES UNIT: 13

2004 Commonwealth Tourism Ministers' Meeting:
Policy Brief

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**Policy Brief for the Commonwealth Tourism Ministers' Meeting, 19-21 March,
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Executive Summary

The Commonwealth's unique membership mix includes a large number of countries that are significant players in global tourism. Irrespective of their size, geographic location, and population, countries within the Commonwealth provide a valuable blend of tourism histories and experiences, interests and expectations. They want to share future policy. Together they are seeking to develop tourism in a more sustainable manner. This inaugural meeting of Commonwealth Tourism Ministers, held at the initiative of Malaysia, will hold discussions on: tourism and the economy and the potential to strengthen linkages within the industry; the promotion of tourism and information exchange; tourism facilities and common security arrangements (including travel advisories); and, capacity building for sustainable tourism and quality services. The meeting will take place in the context of other Commonwealth gatherings with their focus on development, as tourism permeates all aspects of modern life and impacts on the future growth, prosperity and maturity of member states and their citizens. The outcomes of this first Tourism meeting will be viewed with considerable interest by countries both inside and outside the Commonwealth, and by other international bodies which are looking for new strategic directions.

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Author, Commonwealth Policy Studies Unit, acknowledgements

1 Status, representation, recent meetings

The meeting of Commonwealth Tourism Ministers in Kuala Lumpur, Malaysia between Friday 19 and Sunday 21 March 2004 will be the first meeting of its kind and provides a new opportunity for ministers to explore the importance and significance of tourism to countries within the Commonwealth. Commonwealth ministerial meetings vary in attendance between 30 plus out of the 53 members (Pakistan is suspended, and Zimbabwe has withdrawn) to the nearly 50 who come to the best-attended, the Commonwealth Finance Ministers' Meeting. There is speculation as to the number and seniority of ministers who will come to Kuala Lumpur. With the theme of *Promoting Intra-Commonwealth Tourism*, the Commonwealth Travel Mart, also to be held in Kuala Lumpur, is to run parallel to the ministerial meetings and shares many similar agenda items. The ministerial meeting is expected to exchange good practice, incubate new initiatives, and build intra-regional relationships within the Commonwealth which, in the future, will lead to more sustainable tourism products in member nations and across the Commonwealth in its entirety.

2 Record for policy

The unique mix of member nations of the Commonwealth is of particular significance in the context of tourism. For not only does it incorporate a number of 'industrialised' tourist-generating countries, it also incorporates numerous 'developing' tourist-receiving countries. Such distinctions are beginning to erode with globalisation, as richer countries import tourists, while poorer ones export them. The use of English provides particular opportunities for intra-Commonwealth tourism. The variety of Commonwealth nations provides a valuable blend of tourism histories and experiences, interests, and expectations for future policy. Their issues are like those in the wider world where many nations are seeking to develop tourism in a more sustainable, equitable and socially-responsible manner. The outcomes of this meeting will be viewed with considerable interest, both inside and outside the Commonwealth.

The sustainable development of tourism, and the alleviation of poverty in the countries of the Commonwealth, not only represent an agenda item for this conference, but are a central tenet in wider economic and social development across all countries of the Commonwealth. The Commonwealth Fund for Technical Cooperation has already been deployed to assist tourism in a number of developing member countries, and especially those with small populations: in tourism-related public policy, the promotion of public-private sector partnerships, transport planning, enterprise development, environment and information technology. With its focus on small and medium-scale enterprises (SMEs) the CFTC is suited to tourism, an industry dominated by such enterprises. Its major goal to assist the rural poor in securing sustainable livelihoods is clearly consistent with the goals of sustainable tourism and the alleviation of poverty, on the agenda for Ministers' meeting.

All this is of particular relevance to small states, and thus of interest to over half of all Commonwealth member nations. Within the Commonwealth, policy and assistance for small states is organized specifically through a three-tiered framework. The Commonwealth Ministerial Group on Small States (MGSS) meets in the wings of the CHOGM and is supported by that of the Commonwealth Consultative Group on Small States (CGSS). Although the MGSS provides a forum for high-level discussion of political, economic, social and other issues of concern to small states, the fact is that many member nations (32 out of 54) meet the criteria of small states, and a large percentage of these have a tourism-based economy. Numerous meetings and missions have taken place in recent years that impact on tourism.

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'. A broad range of projects has already been completed across a variety of industrial sectors. 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, such as the WTO, 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 Commonwealth Consultative Group on Environment (CCGE) represents the principal forum for building consensus and strengthening co-operation on environmental issues with particular regard to forestry, fisheries, freshwater, and climate change. The 1997 Edinburgh Commonwealth Economic Declaration reiterated the shared interest of all member nations in protecting the environment and enhancing co-operation in this area to achieve sustainable development. Particular attention has been given by the CCGE to small states and adherence to the Kyoto Protocol for the reduction in greenhouse gas emissions. Much attention has also been focused on the Commonwealth's flagship environmental programme – the Iwokrama International Rainforest Programme.

Even since 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, further, an issue of equality for

Indigenous peoples, and all minority groups. This is becoming increasingly relevant to tourism, because of the development of eco-tourism, authentication of the tourism product, and the growing interest in cultural and natural heritage-based tourism.

All these issues have been central to discussions over the past two decades, yet remain fundamental to the future development of tourism within the Commonwealth. The challenge for participants of the Commonwealth Tourism Ministers' Meeting is to bring together the numerous interest groups, and to formulate one policy umbrella.

3 Agenda for 2004 meeting

The current draft agenda, which may be confirmed or amended prior to the conference, is as follows:

1 Tourism and the economy: strengthening of linkages

- Tourism: a network industry
- Globalisation and tourism
- Global tourism trends

2 Tourism promotion and information exchange

- Promoting tourism
- Promoting intra-Commonwealth tourism
- Facilitating the exchange of tourism information

3 Tourism facilities and common security arrangements (including travel advisories)

- Tourism demand and the impact of external events
- Tourism supply and the impact of external events
- Travel advisories and tourist security

4 Capacity building for sustainable tourism and quality services

- Sustainable tourism development and environmental impacts
- Global code of ethics for tourism
- Tourism and the alleviation of poverty

5 Other issues

6 Any other business

- **Papers for information**
- **Communiqué**
- **Acknowledgements**
- **Next meeting**

4 Comments on numbered agenda items

1 Tourism and the economy: strengthening of linkages

Tourism: a network industry

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. No individual component is able to operate successfully in isolation. Tourism is thus an industry of linkages, relationships, networks and co-operation. It is increasingly an industry in which larger organisations seek merger and acquisition, with various components of the industry, in order to gain greater power in the marketplace.

The interconnected nature of tourism ensures that any decision relating to tourism has multiple impacts for multiple stakeholders. Tourism decisions increasingly need to take into consideration the views and expectations of the local community. The sustainability agenda seeks equitable development between countries, an equal distribution of income within countries, the need for product diversification, the protection of natural and coastal environments, heritage, architecture, customs and folklore. With tourism's mix of both public and private sector participants, linkages between the two cultures and organisational types are also necessary.

Commonwealth ministers can explore the extent to which there is commonality within their systems of tourism, the benefits to be gained from the sharing of 'best practice', examples from outside the Commonwealth of effective industry structures, linkages and policies, and examples of effective community participation in tourism.

Globalisation and tourism

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.

Factors underpinning the development of globalisation as the economic mantra of the 2000s, remain technological progress, cultural and demographic trends, the 'demonstration' effect, political stability, and economic internationalisation, regionalisation, and liberalisation. The General Agreement on Trade in Services (GATS) is a fundamental instrument for the liberalisation of trade in services. The effects of this agreement, if successful, will result in a further drive towards globalisation. GATS has a comprehensive coverage of services, and encompasses four modes of supply, namely: cross-border movement of services, movement of consumers across borders, the establishment of a commercial presence, and the movement of natural persons. All four of these modes of supply are important to the tourism industry and will impact on future tourism flows both in and out of member nations. The tourism sector was already more advanced than most in terms of liberalisation before the Uruguay Round that brought GATS into existence and within the GATS the tourism sector has the most commitments of its members. Of 127 member states, only eight have not made commitments in the tourism and travel-

related sector. However most air traffic services remain outside the agreement, which is damaging to the success of GATS in liberalising the tourism industry.

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 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.

For international hotel companies there is an equally stark message. To be successful in someone else's domestic market will mean adjusting the normal company development model so that it fits into a locally acceptable business environment. On the one hand, global branding, marketing, and reservation systems all exploit the economies that can be achieved by a globalised company. On the other, to operate successfully in a foreign market requires a level of local control and delivery that can only effectively be achieved by decentralisation. Those that succeed will be the ones that are able to adapt to a truly global management model, yet where there is no fixed centre of authority and where the operation can adapt to local circumstances.

If the mobility of capital, and an inability to determine the residence of such resources, is a sign of globalisation, then the cruise ship industry is a flagship of the process. Cruise ships represent multinational capital, are serviced by labour from many countries, and can locate themselves anywhere. To date, the impact of globalisation on the cruise ship sector has led to the increased internationalisation of ownership. With detachment of the cruise operator from the destination, the positive benefit to destinations is markedly reduced. The purchase of private islands, and detachment from locals, allows the cruise ship companies to avoid feeding money back into the host countries and instead repatriate profits and income to the originating country -- or to a different country, if there are tax advantages in doing so. Companies that ruthlessly exploit their globalised position may cause the living standards of host communities to decline. There is also a danger of displacing tourism activities, through the expansion of cruise shipping. Cruise ship growth may cause the volume and benefits of land-based tourism to suffer, which can then put the air-based travel systems in jeopardy due to a decrease in demand.

With regard to the airline industry, most of the major players are based in the industrialised countries, where the processes of globalisation and liberalisation have together helped reshape the industry over recent decades. Many of the movements toward liberalisation in the industry have been either bilateral, or multilateral within a regional context, giving liberalisation a scent of exclusivity.

Commonwealth ministers should worry about the impact of further globalisation. There are issues of investment and ownership, and of ultimate control over the tourism product. Further liberalisation of airlines will clearly impact on travel flows and the ability of member nations to control tourist access. The trend toward

consolidation and concentration in the wider tourism industry could serve as a threat to many smaller developing nations and LDCs, without more effective forms of collaboration among member nations.

Global 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 per cent 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 per cent. This reflects an overall decline in market share from 59 per cent to 45 per cent. In contrast, East Asia and the Pacific are forecast to increase to 7 per cent per annum. The respective shares of Africa, Middle East and South Asia are forecast to increase to 5 per cent, 4 per cent and 1 per cent 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 international tourism is calculated at just 3.5 per cent. 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 per cent. Tourism is an industry very much in its infancy.

Perhaps 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 per cent and 5.4 per cent respectively. Whereas long-haul will increase its share in Europe (from 12 per cent to 15 per cent between 1995 and 2020) the Americas (23 per cent to 38 per cent), the Middle East (from 58 per cent to 63 per cent) and South Asia (76 per cent to 86 per cent), the large volumes of first time Asian travelers will result in a rise in the intra-regional share in East Asia and the Pacific (79 per cent in 1995 to 83 per cent 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 per cent in 1995 to 64 per cent 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. Clearly the post-September 11 syndrome remains. However the speed of revival in many regions is a very positive indication of how destinations are likely to cope be there any more incidents of an international terrorist nature. Evidence suggests that it is the risk of an economic downturn in the key origin markets that is a more powerful threat to international tourism than the fear of terrorism.

For the Commonwealth many of the above trends appear favourable for the longer term. However, all member nations need to continue to monitor annual and longer-term trends, particularly in light of the ever-increasing numbers of new products entering the market and the changing composition of many tourist groups. The inflexibility of much tourism infrastructure serves as an impediment to rapid change.

2 Tourism promotion and information exchange

Promoting tourism

Tourism is a promotion-led industry. Commonwealth ministers therefore have to discuss marketing, and the organisations which market destinations.

Promoting intra-Commonwealth tourism

Most member nations are experiencing growth rates consistent with their regions, although individual instances of terrorism and political instability continue to threaten some key destinations in the short term. To both expand and diversify their tourism product, a number of destinations are seeking to move away from their traditional tourism. Others are contemplating inclusion in a more regional approach, where economic co-operation can create an increasing range of multi-stay packages. Collaboration may include the development or improvement of transport infrastructure, relaxation of immigration controls, freer movement of tourists, and the joint-development of attractions, facilities, and major events. Opportunities therefore exist within the Commonwealth for a range of new products, built on the sound foundations of a common history, shared languages, religions and education, close political ties, and a common sense of purpose.

If intra-Commonwealth tourism is going to develop in a substantial manner, member states need to move beyond pure promotion and re-examine immigration control, and develop a spirit of openness between national tourism industries. This presupposes, however, that more tourists wish to travel across and within the Commonwealth countries. Research will be necessary, to understand Commonwealth travel patterns better.

Facilitating the exchange of tourism information

Information is the lifeline of an industry that sells its product on faith and where the service providers are, by definition, geographically dispersed. Consumers, suppliers, intermediaries, governments and researchers all depend upon the flow of information that makes the tourism of the 21st century a reality. The Commonwealth needs to develop and maintain a pan-Commonwealth tourism domain, which facilitates the

initiation, implementation, analysis, and dissemination of market and industry information.

3 Tourism facilities and common security arrangements (including travel advisories)

Evidence over recent decades indicates quite clearly that, although events such as international terrorist attacks impact negatively on the demand for tourism in the short and sometimes medium term, tourism does return. One of the principal concerns among destinations however, is the proliferation in the volume and importance attached to government-driven travel advice. This was an issue at the Abuja meeting of Commonwealth Heads in December, and will be again in Kuala Lumpur. Travel advice or trade embargo? Whatever one's viewpoint, tourism is inextricably linked with politics – be it local, regional, national or international – and demonstrates a high degree of susceptibility to external influences. Thus, although the majority of governments are impartial providers of travel advice, the imposition of travel bans or communication of hostile travel advice can be viewed as a means of achieving both political and economic objectives. To counter this, the 1989 Hague Declaration states that the 'safety, security and protection of tourists and respect for their dignity are a precondition for tourism development. Therefore, travel advice which is impartial, unrelated to international policy objectives and issued with the sole purpose of protecting tourists complies with internationally agreed principles'.

The current concern about travel advice is not so much with its accuracy, but with the sometimes sensational attention given to it by the media, the travel press and the wider insurance industry. Clearly there is a need for balance, given instances of international terrorism, the recent SARS epidemic and the current epidemic of Bird Flu. But tourism today is being driven by an over-sensitive global media industry. Managing the media, and the flow of information, is therefore vital for future crisis management. 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 (predominantly in the United States and Europe), and to keep them accurately informed on a regular basis. Post September 11, "denial" is no longer a sensible reaction to incidents witnessed across the world. Destinations are also recommended to reduce, where possible, the amount of foreign ownership of their tourism product. Members of the Commonwealth should recognise the benefits of collective action, and agree a strategy for producing balanced, yet media-friendly, travel advice.

4 Capacity building for sustainable tourism and quality services

Sustainable tourism development and environmental impacts

Tourism earnings as a share of all services in 2000 escalate from 28.1 per cent for OECD countries to 70.6 per cent for LDCs. In a similar vein, tourism is a principal export (one of top three) for 83 per cent of developing countries and the primary export for 34 per cent. 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. It can conserve cultural and heritage traditions and offer opportunities for small and micro-businesses.

To date, most governments try to adhere to the principles of sustainable development. The outstanding question is how the principles are implemented in practice. 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.

Member nations have much to discuss in how to develop sustainable tourism, and how to implement best practice. This particularly applies to the WTO's Global Code of Ethics for Tourism, and the current focus on the development of sustainable tourism and its contribution to the alleviation of poverty.

Global code of ethics for tourism

With adherence to the Global Code of Ethics for Tourism advocated by the WTO, it is clear that responsible and sustainable tourism is by no means incompatible with the growing liberalisation of the conditions governing trade in services (GATS).

Tourism and the alleviation of poverty

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 – which 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 recent World Summit on Sustainable Development held in 2002 in Johannesburg, where the reduction of poverty and inequality were high on the agenda. In collaboration with UNCTAD, the WTO launched its ST-EP Initiative – Sustainable Tourism – Eliminating Poverty. ST-EP is a project to link Sustainable Tourism with Elimination of Poverty. It is a manifestation of the UN Millennium Development Goal to halve extreme poverty by 2015 and also of WTO's Global Code of Ethics. It focuses on longstanding work to encourage sustainable tourism – social, economic and environmental aspects which

specifically alleviates poverty, bringing development and employment. Its aim is to assist the world's poorest countries, particularly in Africa.

For the future, a framework has been developed with four clear goals. The four goals of the ST-EP Framework are:

- An international foundation to seek sustainable funding from new sources;
- A research net to identify linkages between ST and EP, principles and model applications;
- An operational mechanism which both incentivises and promotes good practice among companies, consumers and communities;
- An annual stakeholder forum for input, exchange and buy-in.

This has to be significant for the Commonwealth.

5 Interaction with other bodies

When contemplating each of the agenda items it is necessary to consider the work of, and to communicate with, a number of other bodies; some with a specific tourism mission and others with a more general purpose in development, economic growth and environmental protection. Collectively, such institutions help determine the wider agenda for the development of tourism. Organisations with a specific tourism remit include the World Tourism Organisation (WTO), the World Travel and Tourism Council (WTTC), the ASEAN Tourism Forum, a regional body which focuses primarily on the collective interest of ASEAN member countries to promote the region as a major tourist region, and the Pacific Asia Tourism Association (PATA). Organisations with a more general agenda include the OECD, EU, World Bank, UNCTAD, G7, G77, UNECE and UNEP. This first meeting of Commonwealth Ministers must build linkages.

6 Other issues

Two other items deserve highlighting for Tourism Ministers. Should the funding and control of the marketing of destinations be in public or private hands? If the marketing of destinations is to remain under public control, public agencies will require greater funds in order to influence their future destiny, and become less reliant on the global tourism industry. The second issue is still globalisation. The rapidity of globalisation is creating paradoxes. The challenge is how to harness the benefits of economic globalisation and channel them into eradicating poverty and providing opportunity for Commonwealth citizens. How can it be done, so that there is sustainable, people-centred, and environment-friendly development? Ultimately, the right answer will lead to greater empowerment for the people of the Commonwealth.

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