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ECONOMIC COMMISSION FOR LATIN AMERICA
Office for the Caribbean

SIXTH MEETING OF
BOARD OF GOVERNORS
OF
CARIBBEAN TOURISM RESEARCH AND DEVELOPMENT CENTRE (CTRC)
(Ocho Rios, Jamaica, 13 June 1979)

Prepared
by
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Director

Sixth Meeting of Board of Governors of
Caribbean Tourism Research and Development Centre (CTRC)
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The meeting of the Board of Governors formed part of the broad programme of the Third Caribbean Tourism Conference which embraced also meetings of the Board of Directors of the Caribbean Hotels Association, the Board of Directors of the Caribbean Tourism Association and a series of workshops on subjects considered urgent to the tourism industry in the Caribbean.

..... Participation in the CTRC meeting embraced Venezuela and all the Caribbean islands whether Dutch, English, French or Spanish speaking, excepting Cuba. In addition to country members, there were the institutional members of CTRC - UNICA, CHA, CTA, CADEC and ECTA.^{1/} From the side of the international institutions there were representatives from the OAS, IBRD, IDB, UNDP in addition to CEPAL (Office for the Caribbean). The aid agencies that are active in the Caribbean were also represented.^{2/} The agenda for the meeting (copy attached as annex) consisted of a review of progress on substantive projects most of which involved co-operation from bilateral or multilateral sources, and essential administrative matters. The project aspects constituted the main points for discussion, which followed the Executive Director's summary of the Caribbean tourism performance in 1978 (based on CTRC data).

He considered 1978 to have been a boom year with tourism gross receipts amounting to US\$1.7 billion (as against \$1.5 billion in 1977), and the number of stop-over visitors up to 7 million (as against 6.2 million in 1977). Most countries seemed to have benefited to some measure, and the origins of visitors seemed to have been more diversified.

^{1/} UNICA - Association of Caribbean Universities and Research Institutes; CHA - Caribbean Hotel Association; CTA - Caribbean Tourism Association; CADEC - Christian Action for Development in the Caribbean; ECTA - Eastern Caribbean Tourist Association.

^{2/} CIDA, USAID, BDD, EEC (EDF).

He identified as characteristics of the Caribbean tourism industry; poor linkage to other economic sectors; excessive leakage of tourism revenues; considerable foreign ownership and control of supply factors; almost complete foreign control of the market apparatus; narrow distribution of tourism profits locally; lack of concern for socio-cultural and environmental issues; and inadequate focus on what the real benefits of tourism are to local Caribbean communities. The goals proposed for tourism were all correctives to these individual characteristics.

The CTRC programme covers education, information, training, development of institutional capacity through technical assistance, socio-economic and market research, statistical analysis and tourism planning projects. Primary focus currently centred on market research and examination of marketing institutions and strategies.

A study of tourist demand in the European market financed by the EEC (European Development Fund) currently in progress, and a similar study for the North American market (with IDB financing) constitute the major items of activity. The European market study report was expected to be available within another month; and the report on the North American study in about one year. As regards tourism planning, CTRC staff have been assisting in the Netherlands Antilles - Aruba and Bonaire, also Haiti and Grenada. The various plans are supposed to cover aspects such as evaluation of the tourism product in terms of infrastructure attractions and amenities, market institutions and strategies, manpower needs, sectoral linkages, and transport constraints, both air and sea.

Most of CTRC's support derived from the OAS which is contracting. However, at the second session of the CGCED there was general agreement among the donors that support should be given to CTRC in furthering its work.^{3/} In addition, the UNDP is to provide a tourism adviser to strengthen the technical assistance aspects of the CTRC programme. Up to that point main UNDP support was in the improvement of sub-regional

^{3/} The initial step (proposed at CGCED) is the establishment of a working group comprising representatives of the CTRC and the World Bank to prepare a plan of action for regional tourism promotion and development.

tourism statistics. The contributions of the other aid agencies comprise a combination of conducting studies through contracted consultants and the provision of experts on short or fixed-term basis. The remainder of support comes from membership fees which cover about one-third of operating costs. The target aimed at is that membership fees should cover all operating costs, with international aid being sought only for major project financing and expansion of CTRC activities.

ECLA involvement with the CTRC has up to now been minimal and consists of substantive support to the CTRC/CARICOM/ECCM/UNDP regional co-operation tourism statistics project. The primary concerns in the project have been to arrive at standardization of the ED card, introduction of computerized techniques for compilation of tourist statistics, improving the institutional arrangements for data collection, and orienting the data to enhance its usefulness for policy making. The current objective is to complete a comprehensive evaluation of tourism statistics throughout the region leading up to an annual tourism statistics report published by CTRC. It is envisaged that UNDP might provide the funding for this.

In terms of economic research, CTRC has conducted visitor expenditure and motivational surveys covering 1977/1978 in the Netherlands Antilles, St. Lucia, St. Kitts-Nevis-Anguilla, St. Vincent, Cayman Islands, Grenada, Haiti and Montserrat. In most cases preliminary reports have been prepared, and it is expected that the final reports will be delivered to the various governments later this year.

Current plans involve going beyond purely economic considerations, and the mounting of a regional conference on the socio-cultural impacts of tourism in Caribbean countries. This initiative was proposed as the result of the findings of tourism education workshops that had been conducted in some fifteen Caribbean countries. The range of matters that would be covered include beach legislation and access, social nuisances as soliciting, personal security of visitors, gambling, crime, drug abuse, health, racial discrimination in the industry, impact on cultural forms, environmental considerations. All these aspects correspond to the CDCC mandates in tourism, and suggest a desirability for some collaboration with CTRC.

6th Annual General Meeting of the Board of
Governors of the Caribbean Tourism Research
and Development Centre to be held at Ocho
Rios Inter Continental Hotel, Jamaica on
Wednesday 13 June, 1979 at 2:15 p.m.

AGENDA

1. Approval of minutes of the Annual General Meeting held in San Juan, Puerto Rico, June 1978.
2. Correspondence.
3. Report by Chairman Mr. Jean Saurel, Director General of Tourism - Haiti.
4. Annual Report of Executive Director, Mr. Jean Holder.
5. Progress Report on European Demand Study by CTRC/Steigenberger Consulting GMBH, and Lufthansa Consulting.
6. International Organizations Report, on joint programmes with CTRC by UNDP, OAS, CDB and others.
7. CTRC/CICATUR (OAS) Tourism Statistical Programme for Aruba, Bonaire, Curacao - An Audio Visual Presentation by Bernard Spinrad.
8. CTRC regional conferences for 1979.
 - (a) CTRC/CICATUR (OAS) Marketing Training Course 25th June to 13th July 1979 - Barbados.
 - (b) Economic Impact Study coordination meeting 19th to 21st September 1979 - Aruba.
 - (c) Second Tourism Education Curriculum Conference 24th to 26th September - Curacao.
 - (d) First Regional Tourism Social Impact Conference 3rd to 5th December 1979 - site to be agreed.
9. Progress report on North American study proposed to the Inter-American Development Bank.

10. (a) Finance report and budget 1980 by Mr. Patrick Hinds.
11. (b) Selection Committee Report.
Election of Directors and appointment of Chairman and Vice-Chairman.
12. Any other business.