

Notes

- 1 These are extremely useful proxies.
- 2 'Producers and suppliers' refer to primary, secondary and tertiary levels of production and supply, and covers a wide range of professions and skills such as agriculture and fishing, transport, culture and arts, heritage, handicrafts, gastronomy, wildlife, birdlife and protected areas.
- 3 The 32 Commonwealth members classified as small states are: *Antigua and Barbuda, The Bahamas, Barbados, Belize, Botswana, Brunei Darussalam, Cyprus, Dominica, Fiji, The Gambia, Grenada, Guyana, Jamaica, Kiribati, Lesotho, Maldives, Malta, Mauritius, Namibia, Nauru, Papua New Guinea, St Kitts and Nevis, St Lucia, St Vincent and the Grenadines, Samoa, Seychelles, Solomon Islands, Swaziland, Tonga, Trinidad and Tobago, Tuvalu and Vanuatu* (small states also classified as SIDS in italics).
- 4 www.thecommonwealth.org/Internal/180407/
- 5 These are what Timms and Conway (2011) dub 'situation factors'.
- 6 McEwan and Bennett's value chain study of Seychelles observed that price positioning was 'already at a premium to its adjacent rivals, Maldives and Mauritius, who themselves are priced way above destinations such as Sri Lanka' (2010: 28).
- 7 However, most recently Maldives has been attempting to diversify its core market away from over-reliance on Europe, given its ongoing economic and financial crisis, and has successfully attracted Chinese tourists. In 2011 Chinese tourists were the largest nationality, accounting for over 21 per cent of international tourists to Maldives (Maldives Ministry of Tourism data).
- 8 Product innovation refers to new and locally developed tourism products and services.
- 9 Data are sourced from a wide range of international organisations, including tourism and development, and individual government ministries and departments such as finance, tourism, planning and economic development. The WTTC 2012 individual country reports on the economic impacts of tourism give an overview of the direct contribution of tourism to the economy and employment, whereas country and government-specific portals are used to source more specific data from annual accounting (supply and use tables, input-output) and government and independent research studies.
- 10 Found under Glossary – Key definitions in all WTTC 2012 country reports, p. 15.
- 11 A product or service that promotes local culture, heritage, skills or knowledge is likely to attract domestic tourists. This is also likely to attract the VFR market.
- 12 Building materials are locally sourced; architectural design blends with the landscape.
- 13 Evidence from Seychelles shows the impact of airlines and cruise operators withdrawing services on the tourism industry. Accessibility is paramount for any SIDS tourism industry.
- 14 Typically this level of data is derived at source and through primary research, such as from entry/exit questionnaires at airports (to accumulate data on expenditure) and national census records (for socio-economic data of the local population).
- 15 In the Caribbean, the winter season is peak season and summer is the shoulder season (months of extreme weather) (Appendix 1, Table A1.1).
- 16 Although Malta is not a SIDS, it shares many characteristics. More specifically, the current economic climate in Europe and southern Europe means that the Mediterranean island states may become more dependent on tourism as their key economic sector.
- 17 Jamaica shares many of the characteristics of small states and SIDS, although it is larger in area and population. It is therefore grouped by the Commonwealth Secretariat with small states. The other larger member countries are Botswana, The Gambia, Lesotho, Namibia and Papua New Guinea.
- 18 Other well-cited definitions of SCM include those by Simchi-Levi et al. (2000, cited in Zhang et al. 2009: 347) and Kranz 1996 (cited in Larson and Dale, 1998: 1). The Simchi-Levi definition is an example of a definition firmly rooted in retail sector, whereas the Kranz definition refers to the different participants in a supply chain.
- 19 Tapper and Font (2004: 1) offer 'The supply chain comprises the suppliers of all the goods and services that go into the delivery of tourism products to consumers. It includes all suppliers of goods and services whether or not they are directly contracted by tour operators or by their agents (including ground handlers) or suppliers (including accommodation providers)'.

- 20 'Producer-driven chains' are those value chains that are governed by the 'holder of core technology' (Mitchell, 2012: 466).
- 21 The accommodation sector also includes small bed and breakfast establishments, youth and backpacker hostels, campsites, caravan parks and specialist accommodation such as university halls of residence etc (Cooper et al. 2004). While they make up the overall sector, their smaller proportion of tourist business in small states means that we will not be considering them here.
- 22 With laundry out-sourcing as an example, local SMEs and poorer households can hugely benefit (see Meyer, 2007; and Ashley and Haysom 2008).
- 23 There is a large body of research on tourist typologies and preferences dating from the seminal work of Plog (1974).
- 24 Seychelles' only feedstock factory closed recently forcing farmers to buy expensive imported feed for their livestock thus significantly increasing the cost of local production. Imported frozen chicken, for example, is now far cheaper than local fresh chicken creating another obstacle to farmers wishing to supply the hotels.
- 25 The Sandals Resorts Farmers Programme would be worth extended study in light of best practice for other small states and SIDS. However, as Rhiney (2009) notes there have been failures too, with one of the farmers' co-operatives failing significantly.
- 26 This may be further complicated if souvenirs are predominantly sold at in-bond shops or duty free in port areas to cruise passengers as happens in some SIDS and coastal small states.
- 27 Fundamentally it is in the interest of the all-inclusive resort or cruise ship owners that their guests do not leave as they can capture even more spend (Pattullo 1996; CESD 2006).
- 28 The cost associated with natural resource degradation, such as beach erosion, is rarely accounted for as an economic impact. A number of research reports from the WRI (World Resources Institute) give evidence of economic impacts of reefs and beaches (positive and negative) specifically in Caribbean SIDS and more generally across all regions in the world.
- 29 See Appendix 2, Table A2.9 for more details.
- 30 Table A2.12 in Appendix 2 shows the economic impact of coastal erosion and reef degradation as a measure of lost revenue/value (US\$m) to the tourism industry in Jamaica. It would be useful to conduct further analysis of this by comparing economic impacts from coastal recreation/tourist activities, coastal protection and beach erosion/reef degradation for different SIDS to understand overall impact of these tourism/recreation activities.
- 31 Additional miscellaneous expenditures include: departure tax (US\$0.7 m); entertainment, land transport, shopping and other (US\$15.4 m).
- 32 Another study (CESD 2006: 20) estimated that the Caribbean had about 50 per cent of the global cruise market.
- 33 The Asia-Pacific region has great potential for cruise tourism and small states such as Singapore and some Pacific SIDS are planning to expand this business (MacPherson 2008; Singapore Tourism Board 2012).
- 34 The two poles for examples, although not Commonwealth small states, have become affordable leisure tourism destinations within the last 15–20 years.
- 35 As an example, P&O Cruises recently announced a £2 million sponsorship deal of the hugely popular UK TV series *Downton Abbey* to tempt 'first timers' to purchase a cruise (TravelMole 2012).
- 36 Accommodation and 'in-bond' shopping in SIDS does not necessarily benefit the local economy or local businesses, therefore calculating average tourist/passenger spend without those particular features should give a better view of local linkages.
- 37 All-inclusive cruise packages.
- 38 Source: www.cruiselawnews.com/2011/05/articles/taxes/cruise-lines-owe-jamaica-more-than-12000-000-in-unpaid-taxes/
- 39 US\$2 head tax for all cruises.
- 40 Caribbean cruise tourism is highly competitive between SIDS as well as cruise operators. This is primarily due to their location to the single largest cruise market – the USA.
- 41 Ports passenger arrivals at private islands in The Bahamas are not given.
- 42 Retail villages within the port development employ local people in restaurants, shops and sell local handicrafts.

- 43 Entrance fees are usually charged (by cruise operators) to passengers using water parks and other cruise-operated 'onshore' facilities.
- 44 This social and local heritage aspect could be hard to separate out from the effects of the small state's conservation of its built heritage but arguably adds to the country's social capital and overall sense of identity.
- 45 For comparison, airport departure tax in Belize at that time was around US\$35 per passenger. Other Central American destinations were charging cruise passenger taxes of US\$2–4 (Honduras) and US\$9.50 (Costa Rica) (Honey 2009).
- 46 This may be captured by accommodation providers or at international ports of entry as part of existing visitor surveys, for example.
- 47 A wider, comparative study of cruise destinations would be useful on this topic to update this research.
- 48 Hall (2001) notes that this might take the form of a decision that funds could be better spent elsewhere or that other policies are already meeting their objectives for tourism in the marine environment.
- 49 Further problems in Belize are documented in CESD (2006) especially the controversy over a new contract with Carnival Cruise Lines that was allegedly negotiated directly with the Prime Minister rather than the normal governmental channels.
- 50 But in most cases there are few alternative sectors that could be developed aside from tourism, fishing and farming.
- 51 Seetanah (2011: 294) states that smallness reduces 'the opportunity cost of specialisation', suggesting that continued dependency on external assistance is a foregone conclusion for SIDS. Minimising this dependency might be possible through effective policy intervention however.
- 52 In fairness it is not just how international tourism is organised itself but in many SIDS the internal organisation of the agricultural, forestry and fishing sectors are not adequate to meet the demands of the tourism sectors.
- 53 It is recognised that tourism and agriculture have different lobbying groups and it may be that different ministries and supporters may need political will and high level co-ordination to facilitate policy linkage between the sectors.
- 54 'Grow what we eat campaign', *Jamaica Gleaner*, 29.11.12; available at: <http://jamaica-gleaner.com/gleaner/20121129/news/news93.html> (accessed 26 April 2013).
- 55 Evidence from Seychelles suggests that the dominant import market for food has led to a dysfunctional supply chain that has seen and overall decline in agricultural production and output. See Table A3.10–A3.14, Appendix 3 for details.
- 56 Malaysia is cited as in the literature as an example of having a high level of leakage from international tourism but conversely it is an economy with other sectors, such as manufacturing and food processing using imports to then sell to the tourism industry.
- 57 CGE refers to Computable General Equilibrium models.
- 58 Professor John Fletcher in Cooper and Fletcher et al (2008: 149) lists small island economies as having income multipliers of between 0.39 and 1.59 but advises caution over the higher values shown.
- 59 Further discussions about sustainable development, pro-poor tourism, green and eco-tourism are not covered within the remit of this report, but are covered by various authors including amongst others Bramwell (2007); Mowforth and Munt (2003) etc.
- 60 Space precludes a detailed discussion here of the problems of effective tourism planning and appropriate development in less developed countries, especially SIDS; however there is a substantial literature (see Hall 2008; Hamzah and Hampton 2013).
- 61 Cost-benefit ratio: visitor expenditure/budget.
- 62 higher multiplier rates were used for Trinidad and Tobago as 'larger percentage of secondary goods and services ... are produced domestically'. Also visitor arrivals to St Lucia are far higher and greater number of inclusive hotels and resorts. (p. 30)
- 63 relates to additional spending during recreation activities.
- 64 2007.
- 65 2004.
- 66 The recent Seychelles Tourism Master Plan (2012) devoted an entire section to the development of the hire car sub-sector and policy recommendations to increase SMEs and local Seychellois ownership of the business. Lessons could be learned for other small states.

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