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# Value Chain Analysis The Tourism Service Sector of Gambia





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## CONTENTS

Acknowledgements.....	iii
Table of Contents.....	iv
List of Tables.....	iv
List of Figures.....	vi
Definitions.....	vii
<b>1. Introduction.....</b>	<b>1</b>
1.1 Tourism Value Chain.....	1
1.2 Chosen sector.....	4
1.3 Tourism Policy Context.....	4
1.4 Recent sectoral outlook.....	7
1.5 Regionalization of the tourism value chains.....	7
1.6 Mapping of target value chain.....	8
1.7 Upgrading in the tourism value chain.....	8
<b>2. Literature Review.....</b>	<b>11</b>
2.1 Tourism Global Value Chain.....	11
2.2 Tourism value chain analysis.....	11
2.3 Tourism linkages.....	12
<b>3. Methodology.....</b>	<b>17</b>
3.1 Quantitative method.....	17
3.2 Qualitative method.....	17
3.3 Limitations of the Study.....	20
<b>4. Results and Discussion.....</b>	<b>21</b>
4.1 Tourism service sector value chain mapping results.....	22
4.2 Discussion of qualitative data issues and reliability.....	23
4.3 Qualitative Survey Results.....	23
4.4 Quantitative Results.....	27
<b>5. Nigeria as a Source Market.....</b>	<b>29</b>
5.1 Concrete Action.....	30
5.2 Regional dimensions and implications for services liberalization under the AfCFTA.....	31
<b>6. Conclusion.....</b>	<b>32</b>
<b>7. APPENDICES.....</b>	<b>38</b>
<b>References.....</b>	<b>40</b>

## LIST OF TABLES

Table 1: Tourism Policy Cycle.....	5
Table 2: Distribution of selected firms and sampling weights.....	18
Table 3: Strength Weakness Opportunities Threat Analysis of the Destination - the Gambia.....	22
Table 4: Distribution of interviewed entities by line of business.....	23
Table 5: Concrete Actions to make the Destination Attractive to the Nigerian Tourists.....	30
Table 6: Basic Action Frameworks.....	35

## LIST OF FIGURES

Figure 1: Tourism value chain.....	1
Figure 2 : Leisure global value chain.....	9
Figure 3: The tourism value chain.....	13
Figure 4: Tourism's link with other economic activities.....	14
Figure 5: Percentage distribution of market of operation.....	22
Figure 6: Percentage distribution of transport service use by supply nature.....	23
Figure 7: Percentage distribution of waste collection service by supply nature.....	24
Figure 8: Percentage distribution of security service by supply nature.....	25
Figure 9: Percentage distribution of catering service by supply nature.....	25
Figure 10: Percentage distribution of medical service by supply nature.....	25
Figure 11: Gross export in the hotels and restaurants for the Gambia and Nigeria (Purchasers Price, 2015).....	25
Figure 12: Gross export in the hotels and restaurants for the Gambia and Nigeria (Basic Price 2015).....	27
Figure 13 : Arrivals from Nigeria.....	30
Figure 14: Making Global Value Chains Work for Development.....	34

## DEFINITIONS

**Tour Package** is a combination of two or more products where customer and market segment being targeted gain an advantage compared with buying the items separately. Core holiday components, such as transport, accommodation, meals, attractions and entertainment, can be carefully combined into a complete packaged experience. Packages provide the customer with either greater convenience or a more competitive price.

**Accommodation** refers to an establishment such as boarding and lodgings, caravan/camp sites, cottages/villas, eco-lodges, farm stays, guest houses, home stays, hostels, motels, restaurants, tented camps, serviced apartments, town hotels and vacation hotels.

**Destination Management Company** refers to a person who carries on the business of organizing accommodation, transport, tours or excursions, transfers for consideration.

**Excursion Agent** is a person engaged in arranging excursions, or tours for tourist.

**Ground handling agent** refers to a person undertaking business of organizing tours, excursions, transfers, tourist services or facilities within the country for consideration.

**Ground tour operator** is a person undertaking business of organizing tours, excursions, transfers, tourist services or facilities within the country for consideration.

**Hotel-Keeper** refers to any person who owns or operates a hotel as a proprietor and includes a person managing or operating the affairs of a hotel on behalf of the proprietor.

**Restaurant** is a commercial catering establishment where meals are served on a flexible time arrangement,

including such variations as café, coffee shop and similar outlets and where an extensive range of specialized cuisine is offered.

**Traveler** refers to a person who contracts with a hotel, motel, lodge, inn, guest house, tourist apartment, or other accommodation or tourist enterprises for the provision of travel or travel related service of any kind whatsoever.

**Travel Agent** means a person who carries the business of organizing travel tickets, accommodation and services within, from and to the country.

**Tourist** refers to a person or a group of persons visiting the country for a period of more than twenty-four hours for holiday, leisure, conference, religion, sports, health, business, visiting friends and relations, or any similar purpose but excludes persons in employment in the country, members of air crews, refugees and military personnel on active service.

**Tour Operator** means a person who carries on the business of organizing tours or excursions to or from the country for consideration.

**Tourist Guide** means a person who provides guiding services to tourists or visitors for reward.

**Tourism Handling Agent** refers to a person who carries on the business of organizing accommodation, transport, tours, excursions, transfers, tourist services or facilities within the country for consideration.

**Tourist Enterprise** is an organization which deals in tourism and includes ground handling agents, ground tour operators, destination Management Company, tour operators, travel agents, excursion agents or any other designation.

## INTRODUCTION

This chapter presents an overview of the tourism value chain concept, tourism policy context, recent sectoral outlook, regionalization of the tourism value chains, mapping of the target value chain and upgrading in the tourism value chain.

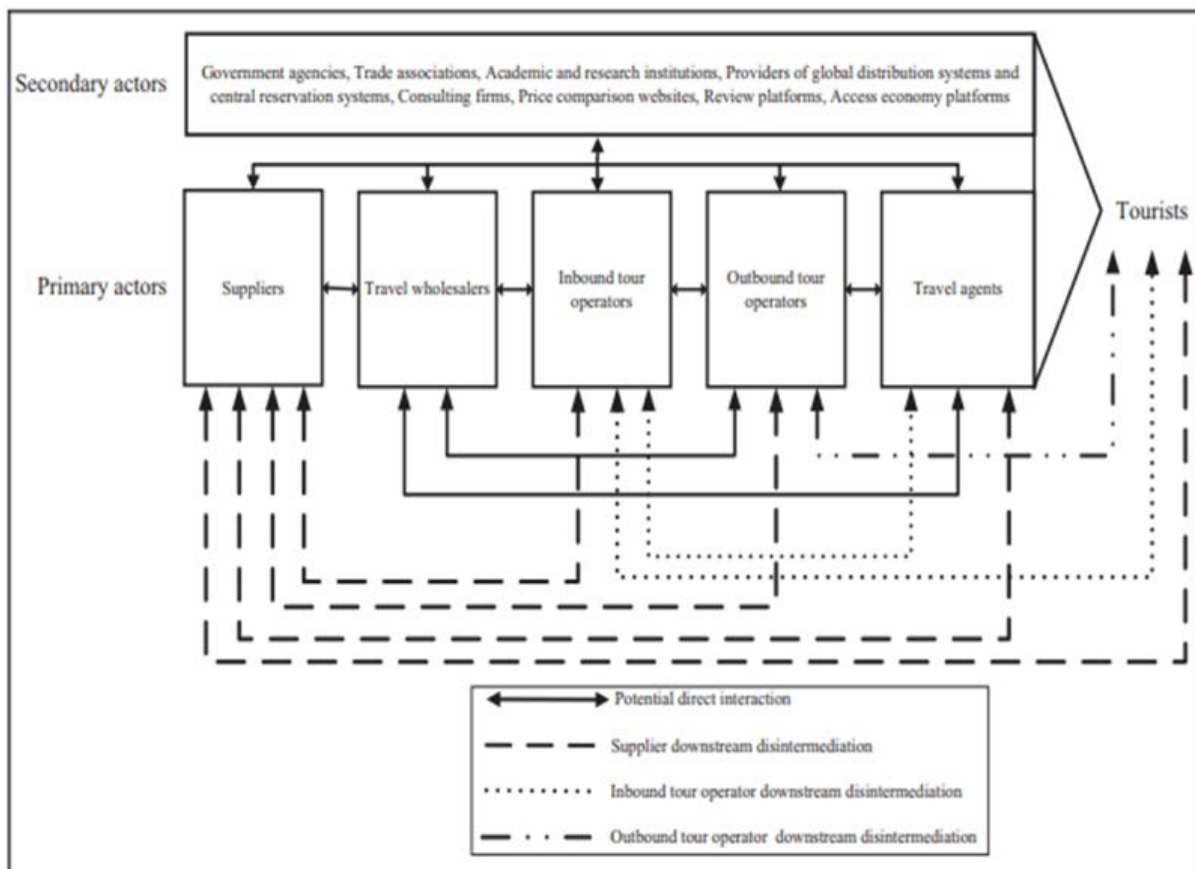
### 1.1 Tourism value chain

The Tourism Value Chain concept is adapted from the value chain approach that focuses on the full range of activities required to bring a product or service from conception, through the different phases of production and delivery, to the final consumer (Kaplinsky & Morris, 2000). The Value Chain approach aims at exploring potential leverage points that would help in developing a systemic competitive value chain that enables inclusive and sustainable economic growth. This is achieved through appropriate selection and analyses of an entire value chain, engaging key private sector actors and facilitating the establishment and strengthening of sustainable or commercially viable

private sector-led market-based solutions to create positive economic impacts to target populations (SNV, 2010).

TVC is made up of interconnections between ‘nodes’ established by tourism planners, primary suppliers, tourism intermediaries, and tourists. From the point of view of tourism product holders, is a coordinated activity of various entities from destination managers and attractions, to travel agencies and carriers, accommodation, food, entertainment, recreation, trade, guides, production and sale of souvenirs and local products, banking and exchange services, car maintenance, health services, information, and communication technology, etc. From the point of view of tourists, it includes various activities that the tourist performs from preparation for the trip, through travel and stay at the destination, to return home and subsequent care of the guest.

Figure 1: Tourism value chain (Mwesiumo et, al, 2016)



Source: Mwesiumo and Halpern (2016)



The Tourism value chain is further described in two approaches; the destination logic and the supply chain logic.

Destination logic is analyzed as a composition or sequence of services that tourists can benefit from throughout their stay. Destinations with a diverse range of tourism products that are well packaged, transparently and easily linked together to meet tourists' needs are considered to be more likely to provide greater value to visitors than those with less product coherence. Furthermore, tourism firms will benefit to the extent that a value chain meets all of a tourist's wants, and providers will be more profitable if travelers pay for the extra and comprehensive services.

The destination value chain recognizes that any tourist will require a variety of services throughout their vacation, and it also assumes that these services will be consumed in a logical order over the course of the vacation. Tourist sites with a diverse range of offerings will have a higher turnover and economic value than those with fewer things to offer. Tourists will profit from the transparency of the tourist product's components, which will comprise the service concept, service method, and service system when they are closely integrated.

Supply chain logic is based on Porter's original production-oriented model, which asserts that each tourism product is made up of a series of production phases to which material and immaterial resources are added afterwards. The product gains fresh value at each step. From start to finish, the production may be carried out by a single entity, or it may be carried out by a number of actors in a supply chain. The supply value chain is a comprehensive description of the activities required to move a product or service through the various stages of production (including physical transformation and inputs from multiple producers and services) in order to meet consumer demand.

The supply value chain considers the entire production process of a product, not just its consumption. In the case of the tourism sector, local distribution intermediaries, inbound tour operators, and Destination Management Companies (DMCs) must collaborate with global tour operators and travel brokers to gain

access to consumers and overcome trust deficits in the tourism value chain. Global tour operators work as both manufacturers and distributors, purchasing services from various providers and assembling them into leisure tourist packages with the help of DMCs. The experience of the local market that global tour operators bring to the table helps them to make important judgments about what products to sell and how to sell them while also exerting leverage over suppliers.

The tourism value chain presents the general steps and the suppliers whom a tourist interacts with from commencement of a trip to the end (Appendices 1 and 2). These steps and suppliers in the value chain are also referred to as components. Within the outbound country, information is either collected independently or through travel agents and tour-operators. At the destination, domestic agents/operators and facilities are directly or indirectly used during the holiday. Such facilities include transport, accommodation, food and beverage, handicrafts, other tourism assets and support services. Infrastructural support offered by support institutions (public, private or both) encompasses construction materials, energy, water, education, communication, public security and health.

The components of a value chain, having both an international and domestic dimensions, are the following:

#### (i) Distribution

The first segment in the distribution, where the main distribution intermediaries (travel agents and tour operators) are involved, is the purchase of tourism products or the components of the trip. In doing this, the travel agents usually act as the retail outlet for tourism products (transportation, lodging, and excursions), and tour operators act as wholesalers. Tour operators purchase blocks of airline seats, hotel rooms, and excursion activities and bundle these segments into various package arrangements. The packaged product is then sold via a travel agent or directly. However, visitors can bypass intermediaries and book their trip components directly.

#### (ii) International transport

The most common international transport mode is international air carriers. International distribution and

transport are based in the outbound countries but there are regional distribution and transport segments based in the inbound country too. Inbound countries have their own distribution actors (e.g. destination management companies, accommodation providers, ground handling agent, ground tour operators, excursion agents, travel agents, tour-operators, visitors' guides, tourism handling agents and other tourism enterprises) and often work directly with international distribution firms.

### (iii) Destination

While in the destination country, visitors engage in a number of events that include local transportation (air or ground), lodging, and excursions. Accommodation options range across different scales and sizes (boarding and lodging facilities, caravan/camp sites, cottages/villas, eco-lodges, farm stays, guest houses, home stays, hostels, lodges, motels, tented camps, serviced apartments, town hotels, vacation hotels among others). Excursions, on the other hand, are the local activities which are representative of the tourism product and the natural assets of the destination. Many excursion activities are sold by operators and executed by local guides who take on the role of area experts. Retail may also be considered as part of excursions.

Except for international airfare, most segments of the tourism value chain are characterized by a diverse array of organizational, ownership, and operational business structures. Large corporations coexist with small and medium enterprises and micro-businesses. Such a sophisticated level of coordination and marketing that reaches visitors based in numerous countries and regions is necessary in international tourism. Firms that have coordination capabilities and marketing strength take the most value.

#### 1.1.1 The case of gambia

The tourism sector in Gambia plays a vital role in boosting the economy of the country through foreign exchange earnings making significant contributions to the country's GDP. Additionally, job opportunities created as a result of tourism activities in the country enhances the livelihoods of the Gambians (see Appendices 4). The Gambia tourism industry is characterized by: high level of dependence on charter

flights and aircraft owned by major European tour operators; strong concentration on the winter season; focus on accommodation facilities close to the sea near Banjul airport; short average length of stay with relatively limited travel within The Gambia; and relaxation as a prime holiday motive (The Government of The Gambia, 2006).

The Government of Gambia exclusively recognized the contribution of Tourism in the country and this led to the development of The Gambia Tourism Development Master Plan in 2006 under the department of state for tourism and culture. The master plan focused on increasing the net foreign exchange from an estimate of US\$40 million in 2004 to US\$130 million by 2020 (The Government of The Gambia, 2006). The plan further highlighted the key areas that needed to be taken into consideration in order to ensure growth of tourism and enhance the spillover of benefits to the economy. The focus areas included and not limited to: infrastructure development; promotion of local products in hotels and restaurants; improving the functioning of the horticulture supply-chain to the food service industry in terms of wholesalers and women groups; conservation and exploitation of natural and cultural heritage sites and areas. Consequently, The Gambia Tourism Development Master Plan pointed out that, there is need to have a concerted action by both private and public sector to ensure growth and development of the sector, protecting its market share from its competitors. The emphasis on uplifting tourism sector is also prioritized in the National Development Plan (NDP – 2018-2021) which clearly states, "Government's goal is to make tourism a highly competitive and sustainable industry that is people and culture - centered that celebrates our cultural heritage and contributes to socioeconomic development. Key interventions will focus on policy reforms in aid of competitiveness; marketing for destination recognition and attractiveness; quality service delivery; enhanced security; product diversity; enhanced community participation and greater linkages with other sectors especially agriculture and natural resources, as well as promotion of the Gambia's biodiversity and rich culture through opening up the sector to rural and

non-urban based locations. These measures will boost tourism arrivals, tap high value market segments and contribute to jobs and economic diversification”.

Policy makers and tourism stakeholders in developing countries are beginning to acknowledge the potential of the tourism industry in accelerating the economic growth and reducing unemployment and poverty. While International tourism is much concentrated in developed countries, like most economic activities, it's worth noting that, about one third of international visitors arrive in a developing countries for tourism purposes. . In the developing world, the middle income countries capture the lion's share of the international market and though small in terms of the global market share, international tourism has a disproportionate economic impact on very poor countries (Roe et al., 2004).

Africa's potential of service trade is yet to be fully unlocked and this is partly due to the challenge in assessing the contribution of the service sector to the economy and understanding the complexity of global and regional service value chains which are essential for service to thrive. Against this backdrop, The Development Account Project on service trade in Africa funded by the United Nations and implemented jointly by the United Nations Conference on Trade and Development (UNCTAD) and the United Nations Economic Commission for Africa (UNECA) commissioned this study.

The project aims to contribute towards unlocking the potential of service trade in Africa, strengthening the national and regional capacities to measure the value added that is generated by regional service value chains, assessing the degree to which developing targeted service sector may improve the tradability of goods and service, improve integration into regional value chains (RVCs) and global value chains (GVCs), and identify respective policy gaps. The study aims at analyzing The Gambia's tourism service sector

value chain. The findings of the study will support the development of a comprehensive roadmap and necessary policy frameworks that would enable Gambia as a tourist destination to maximize the benefits that are derived from tourism service sector, in terms of facilitating transactions, supporting employment and fostering inclusion.

### 1.2 Chosen sector

The project targets service sectors that are critical for enabling trade and fostering inclusiveness, namely, financial and tourism service. In Gambia, the focus of the project is on the tourism service sector. Tourism service sector contributes towards complete growth and development of Gambia by bringing numerous economic values and benefits as well as helping in building the country's brand value, image and identity. Furthermore, tourism service sector goes beyond attractive destinations, to being the most important economic growth drivers of Gambia.

### 1.3 Tourism Policy Context

Policy-making and governance issues are relevant to both supply and demand issues, and hence crucial in this particular context. The Gambia Tourism Policy (The 2006 Gambia Tourism Master Plan) is quite voluminous and comprehensive, however it appears to be largely bypassed when it comes to implementation. The quantity of tourism action plans from various sources is impressive with several sound policy and strategy initiatives in the past two decades. Many action plan proposals have a strong 'echo' between the different periods.

The overwhelming problem is that many of the proposals that were eloquently advocated since the 1980s have simply not been implemented. Table 1 below shows the various tourism policies developed by the Governments of The Gambia.

**Table 1. 1: Tourism Policy Cycle**

Focus Area	Tourism Impact Study 1986 (Action Plan)	National Policy for Tourism Development 1995 (Action Plan)	Sector Export Strategy Tourism Sector 2002	Tourism Development Master Plan 2006 (Action Plan)
Withdrawal of Government from hotel sector	Financially restructure hotels from which Government of The Gambia (GoG) is withdrawing and careful use of government guarantees on hotel investments			
Effective regulation of hotels & tourist enterprises	<ul style="list-style-type: none"> <li>• Enhance financial reporting, tax compliance and GHA;</li> <li>• Establish data collection system;</li> <li>• Strengthen Ministry of Tourism (increase budget, efficient licensing function; tourist guards; and, statistics);</li> <li>• Strengthen Tourism Licensing Board (increase budget, contacts with private associations, national coverage, maintain standards);</li> <li>• Issue regulations (hotel classification, hygiene standards; sanctions; environmental protection; incentives for compliance); and</li> <li>• Increased revenue (raise airport tax, tax concessions for those using locally-produced goods; tax relief for training Gambians).</li> </ul>	<ul style="list-style-type: none"> <li>• review and streamline existing legislation to be more tourism responsive and transfer licensing authority to Ministry of Tourism;</li> <li>• improve service and supply quality standards with the provision of subsidies; support to small producers; hotel classification; rehabilitate the Airport;</li> <li>• tighten tourism security on beaches, craft markets, hotels and tour sites;</li> <li>• institutional strengthening of MIT and Tourism Office for a more responsive planning, implementation, monitoring, research and data collection;</li> <li>• Adequately resource the tourism sector;</li> <li>• Education campaigns to minimise negative acculturation of Gambians by tourism;</li> </ul>	<ul style="list-style-type: none"> <li>• Adequate standards are set for industry and adequately regulated by GTA;</li> <li>• Ensure quality of service through fast-track classification of hotels;</li> <li>• GTA manpower and financial capacity strengthened to carry out marketing, regulatory, HRD, responsible tourism mandate;</li> <li>• Capacity of ASSET strengthened to meet quality of service requirements; and</li> <li>• Use education and public awareness to address the 'bumster problem'.</li> </ul>	<ul style="list-style-type: none"> <li>• Institutional strengthening of DOSTC &amp; GTA in marketing, statistics, planning and policy;</li> <li>• Needs assessment of 'bumsters' and implement recommendations;</li> </ul>

Focus Area	Tourism Impact Study 1986 (Action Plan)	National Policy for Tourism Development 1995 (Action Plan)	Sector Export Strategy Tourism Sector 2002	Tourism Development Master Plan 2006 (Action Plan)
<p>Development of tourist industry &amp; diversification of tourism activities</p>	<ul style="list-style-type: none"> <li>• Increased utilisation of local produce;</li> <li>• Refinancing Gambia Hotel School;</li> <li>• Development of tourism in interior &amp; along River Gambia;</li> <li>• Develop Gambian artisans (craft markets);</li> <li>• Widen promotional activities</li> </ul>	<ul style="list-style-type: none"> <li>• quantitative growth of tourism to 150 000 arrivals and 10 000 beds by 2000 through diversification of tourism product, attracting higher spending tourists and improving standards of infrastructure and new hotels;</li> <li>• maximise economic returns by import substitute Gambianisation; providing incentives for investors; reducing the tax burden on hoteliers and operators, diversifying tourism product and devolving licensing authority to MIT;</li> <li>• develop a human resource development plan; redesignate Hotel School as a 'Tourism Development Institute' strengthen the curriculum, staff, physical infrastructure and organise training protocols;</li> <li>• reduce tourism 'leakages' through the recruitment of Gambian managers;</li> <li>• de-enclave tourism from its coastal confinement by developing up-country tourism;</li> <li>• explore alternative tourist source markets in Europe, America and West Africa; and</li> <li>• publicity campaigns to introduce alternative forms of tourism</li> </ul>	<ul style="list-style-type: none"> <li>• Increase arrivals to 200 000 by 2007 through product improvement, hotel bed expansion and aggressive marketing by GTA &amp; industry (\$4.5m budget 2003 to 2007);</li> <li>• Diversify and improve tourism product by moving into niche markets;</li> <li>• Encourage major investment in high quality hotels through incentives;</li> <li>• Strengthen linkages with rest of the economy;</li> <li>• Facilitate access to tourism by all and support handicraft sector;</li> <li>• Upgrade Hotel Training School to hotel training and management institute;</li> <li>• Develop a public – private sector relationship based on common economic objectives and stakeholder associations;</li> <li>• Improve infrastructure in TDA and at airport.</li> </ul>	<ul style="list-style-type: none"> <li>• Increase air access to The Gambia from major source markets;</li> <li>• Institutional support to producer organisations to encourage agricultural linkages;</li> <li>• Upgrading Gambia Hotel School;</li> <li>• Product development to revitalise existing resorts, but also longer-term vision to develop tourism ten TDAs along River Gambia;</li> <li>• Destination marketing;</li> <li>• Infrastructure (stream pollution control, Green Hotel programme, NAWEC)</li> </ul>

Source: The 2006 Gambian Tourism master Plan

#### 1.4 Recent sectoral outlook

The prominence of tourism service sector to the economy of Gambia cannot be over emphasized. The total contribution of Tourism to GDP in Gambia accounted for 20.5% in 2011–2014 (UNTAD EDAR 2017). The service sector in Gambia; tourism included has been the greatest contributor to the GDP for more than a decade contributing more than half of the GDP in 2016, 2017 and 2018 with 53%, 58% and 61% respectively. Gambia's international tourism receipts and tourism export revenues amounts to 120 and 138 million US dollars respectively (UNTAD EDAR 2017). At the country level, tourism has been a vital and dominant export sector, accounting for more than 30 per cent of total exports. In 2011–2014, Gambia tourism export revenues accounted for 43 per cent of total export revenues, while in Sao Tome and Principe and Seychelles, it accounted for 89% and 36% respectively.

Tourism service sector is thriving in providing direct and indirect jobs for Gambians and non-Gambians. Data obtained from the 2019 Tourism Establishment Survey conducted by the Gambia Bureau of Statistics shows that the total number of persons employed by the accommodation establishments was 5,312 of which 5,153 were Gambians and 159 non-Gambians. Out of the Gambians employed, 3,365 were males, and 1,788 were females. For the non-Gambians, 106 were males and the rest were females. Arrival figures continue to surge increasing from 161,118 tourists in 2016 to 209,135 tourists in 2018.

This positive outlook could be attributed to improved air connectivity and intensified marketing promotions by the Gambia Tourism Board, budding relations with other countries, close collaboration between the Gambia Tourism Board and their partners as well as the growing recognition of the country's democratic gains.

#### 1.5 Regionalization of the tourism value chains

Regional value added is a key target for sustainable regional development within a particular geographic region. In the tourism sector, the more services can

be provided within the region, the greater the regional value added. It's critical to identify those services that are provided at the different levels of the value chain by providers outside the region. It's worth noting that the impacts of networking the tourism sector with small enterprises from neighboring sectors can be achieved for regional value added at many points in the tourism value creation system (See Appendices 6-example of a tourism value creation system). Tourism offers a large number of attractive options and expedient entry points for relevant development projects. Regionalization of tourism value chains boost the circular economy in which most of the raw materials are processed, sold, used and then thrown away and not recycled and this obviously runs counter to the finite nature of resources, the limits to which the ecosystem can be stretched and the concept of sustainability.

Tourism service sector provides a crucial contribution to regional value added and development in developing countries and emerging economies and that makes it an effective instrument for development cooperation actors to achieve overarching development objectives. Although the trip mainly takes place at the destination, tourism is an export because it brings foreign currency into the country and thus an essential pillar of the economy, which offers sales opportunities especially to small and medium-sized enterprises. As a cross-cutting sector, tourism provides revenue not just in the hospitality industry but also in neighboring sectors including the retail trade, providers of leisure activities, farmers and craftspeople and this is where great potential lies to increase regional value added by integrating regional companies into the tourism value creation system.

In addition, tourism presents low barriers to entry for new providers and thus offers a good starting point for tourism start-ups, such as restaurants and cafés, guided tours and excursions or the staging of events. Through tax revenues, tourism helps to finance public budgets and stimulates investment in local infrastructure. This not only enhances the quality of tourism offerings, it also improves the quality of life of the population. Regionalization of tourism value chains

can also be enhanced through product quality and innovation as well as digitalization of communication and marketing strategies.

### 1.6 Mapping of target value chain

Mapping and managing the tourism value chain is described as extending an organization's line of focus and impact beyond traditional areas on immediate supplier chain partners. Mapping necessitates a more extensive approach that evaluates the entire product or service chain, culminating in a map of the value chain's structure. The map should focus on upstream raw material producers, intermediate suppliers, and service providers, as well as downstream customers and end-of-life management. Consideration of indirect stakeholders, such as relevant government organizations, Research & Development, and financing institutions, should be factored in to produce better results.

The main goal of tourism value chain mapping is to reduce risk and add value at each stage of the value chain, as well as to guide the activities that should be undertaken within it based on the identification of hotspots, threats, and opportunities, as well as the formation of new partnerships and collaborations to address or capitalize on them. A multi-faceted tourism value chain map should include operational, economic, environmental, and social data. This can be derived from both top-down national and tourism-related statistics and bottom-up primary data gathering conducted by value chain partners and other stakeholders such as trade associations and non-governmental organizations (NGOs). As it is in any other country with tourism activities, there are series of contact points which provides a range of service at each stage. Additionally there are suppliers who ensure that quality services are provided to tourists to enhance their experience. Failure to provide excellent service at each contact point creates a service gap as a result of customer dissatisfaction and this amounts to loss of revenue and overall country competitiveness (Tourism Confederation of Tanzania, 2009).

### 1.7 Upgrading in the tourism value chain

Upgrading refers to the process of improving the ability of a firm or a country's economy to move to a more profitable and/or technologically sophisticated and skill-intensive economic niche. In tourism, there is no single pattern of upgrading as might be the case in manufacturing industries because tourism encompasses numerous and diverse components. The multi-sectorial nature of tourism allows for multiple paths to be pursued; with one form of upgrading occurring simultaneously with another (see Appendices 3). Domestic policies, access to international markets via tour operators and travel agents, human capital, and strong international image are critical in successful tourism development. The most common types of upgrading that were considered in this study are the following:

- (i) Process upgrading (incorporating more sophisticated technologies into production) is an increase in production efficiency that results in either greater output for the same level of inputs or the same level of output from fewer inputs. Process upgrading reduces the cost of production and may be attributable to improved organization of the production process or by the use of an improved information and communication technology.
- (ii) Product upgrading (producing higher-value products) is a qualitative improvement in the product, making it more desirable to consumers. Quality is defined very broadly to include extrinsic, intrinsic, tangible or intangible changes resulting in the product being able to command a higher final price.
- (iii) Functional upgrading (moving to higher-value functions) is the entry of a firm into a new, higher value-added level in the value chain. This moves the firm closer to the final consumer, requires the firm to take on new functions, and positions the firm to receive a higher unit price for the product.
- (iv) Channel upgrading is the entry of a firm into a pathway leading to a new, higher value-added end market, such as a local, national, regional and/or

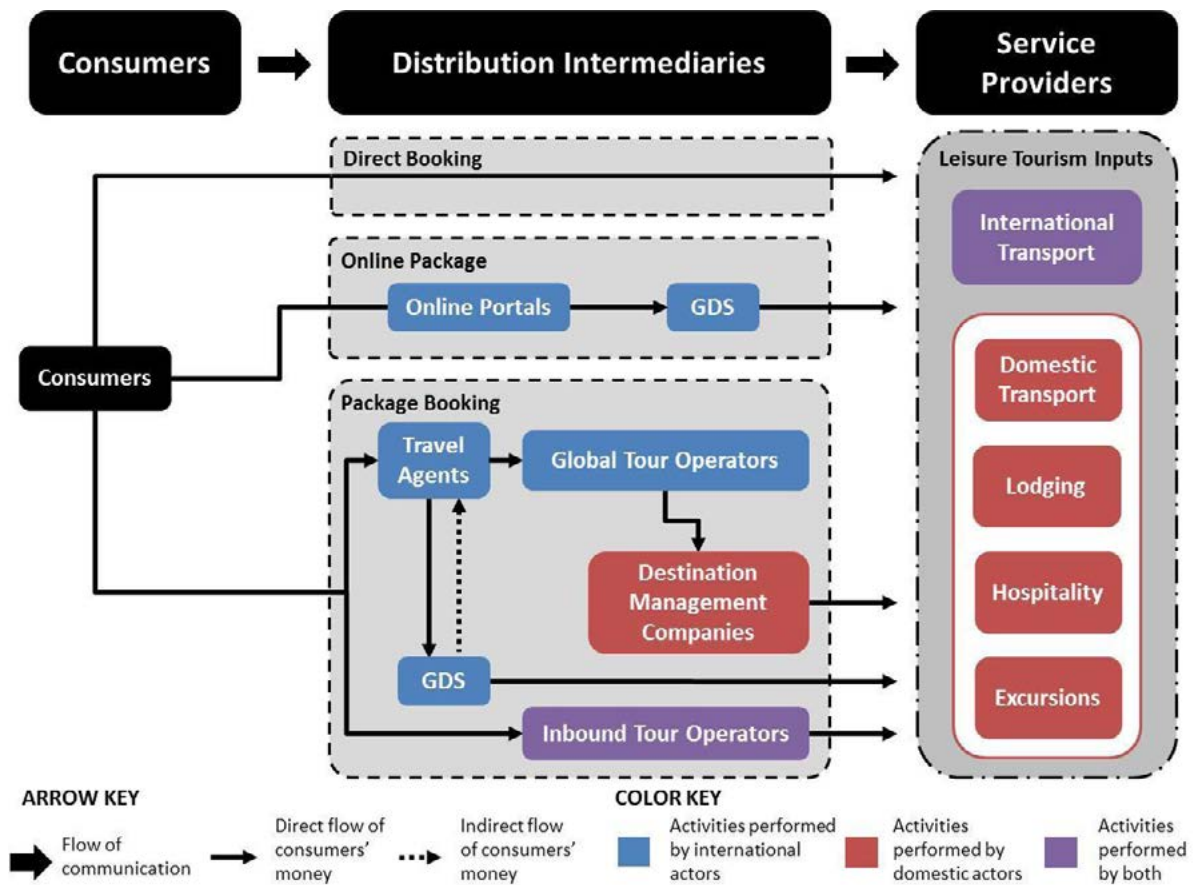
global end market. Firms may operate in one or more market channels at the same time.

(v) Inter-sectoral upgrading is leveraging expertise gained in one industrial sector to enter a new sector.

In all stages of the value chain in the tourism industry, there are several activities that take place in order to deliver the best experience to tourists. Figure 1 below indicates the activities involved for each stage of the value chain. Pictorial demonstration from Daly

and Guinn (2016) shows that, activities in the value chain are divided into three; services provided by international actors who include Global tour operators, travel agents and Global distribution system; services/ activities provided by domestic actors who include Tourism assets, domestic transport, lodging, hospitality & excursions and; activities performed by both such as inbound tour operators and international transport.

Figure 2 : Leisure global value chain (Adopted from Daly & Guinn, (2016)



Source: Adopted from Daly & Guinn (2016)



# CHAPTER II

## LITERATURE REVIEW



## 2.0 INTRODUCTION

Value chain analysis in any sector is of great importance as it provides keen details of what comprises the sector and the contribution of all the activities and players in the chain to the sector at large. From the tourism perspective, (Rajashekariah & Chandan, 2013) argues that at the destination country, value chain analysis is essential in understanding the extent of engagement of stakeholders and the economic model which operates in that specific country. This section presents review of literature on value chain analysis which has been conducted in different countries as well as at a global level (Global Value Chain).

There is a wide range of approaches that are used in analyzing value chains in tourism sector, to provide the intended results. Among other approaches, (Mitchell, 2012; Ashley, Mitchell, & Spenceley, 2009) highlights on “follows the tourist dollar” approach, developed by ODI which targets at examining tourists’ total expenditure, keep track of who benefits from the expenditures and how.

### 2.1 Tourism Global Value Chain (GVC)

Global Value Chain (GVC) concept was invented by Gereffi, (1994) and since then it has been used in studying value chains in diverse sectors. This concept follows empirical studies of globalized economy, which involves a range of sectors and its analysis centers on the dynamics of inter-firm linkages within the system, and the way in which firms and countries are integrated globally (Mitchell, 2012). Nevertheless, the GVC further is said to extend beyond firm-specific linkages which in turn reveals the dynamic flow of economic, organizational and coercive activities between producers within various sectors in a global scale (Kaplinsky & Morris, 2001)

According to Gereffi, Global Value Chains relate to the entire set of activities that take a product from conception to end usage, including design, manufacture, distribution, and customer service. Each action can be contained within a single firm or outsourced to multiple firms, contributing varying levels of value to the final output. The concept of trade as based system market transactions between countries is challenged by the fact that a considerable amount of commerce is coordinated by global buyers

and suppliers. The gap between where final items are manufactured and exported and where value is created and captured is widening as various stages of intermediate commodities are transferred across borders. The Global Value Chain analysis looks at the nature and drivers of competitiveness, with a focus on the necessity for local businesses to create globalization strategies.

In analyzing the tourism GVC, (Daly & Gereffi, 2017) identified two areas within the tourism industry that are of relevance in African countries which are business tourism and leisure tourism. The GVC framework is used to elaborate important global dynamics in the tourism industry as well as their implications and trends for African actors.

Leisure tourism in Africa has gained popularity through the ‘Package Booking’ distribution channel. Whereby, tourists get to experience different activities such as accessing eco-tourism, safaris also surf and sand products from a network of actors that have strong ties to one another (Daly & Gereffi, 2017). Thus, assembling and packaging of individual service to a cohesive travel experience are done by the lead firms (Daly & Gereffi, 2017). More so, Christian, (2015) attest that the power of lead firms derives from the ability to draw on the capabilities of large, global networks of service providers, while also having direct access to consumers or travel agents. Analysis of tourism GVC found that, in 2014 distribution channels contributed to creation of millions of jobs (WTTC, 2015). However, there are areas in the distribution channels which are yet to be exploited efficiently and have potentials for value-creation (Daly & Gereffi, 2017).

### 2.2 Tourism value chain analysis

There are different countries which have taken a step to conduct value chain analysis/mapping in their tourism sector. To mention a few, there is Tanzania, Gambia and Seychelles; and Ladakh (a region in India). All these countries are well endowed with natural attractions which for years have contributed to inflow of tourists, job creation and GDP growth. With reference from the Case of Ladakh done by (Rajashekariah & Chandan, 2013) portrays tourism model in Ladakh to have a diversified tourism products which are provided in the value chain to cater for the tourists. They also recognize the key stakeholders in the

tourism sector to be both state and non-state actors and both contribute significantly to the value chains in this sector. The value chain analysis in this region established that, despite a massive influx of tourists, there is demand for specialized tourism especially for adventure which is said to be on the rise. Also the benefits accrued from tourism is alleged to fall on the hands of the few as majority of the investors are either local elites or seasonal entrepreneurs from Kashmir, Punjab and Delhi, whose profits are repatriated to metropolitan centers.

Given the contribution of tourism in Tanzania, one among the prominent tourism destinations in Eastern Africa, the value chain analysis was also carried out. The (Tourism Confederation of Tanzania, 2009) report underlies areas that were taken into consideration in the analysis which includes: domestic tourism, beach and safari excursions, business tourism, cultural tourism and a specialized high value segments (i.e. hunting, trekking, mountain climbing and also diving). The value chain analysis identified issues such as infrastructures, human resources development, regulation and taxation as well as branding which seem to somewhat hinder players along the value chain.

Seychelles tourism sector also took an initiative to conduct a value chain analysis in their tourism sector. Based on (McEwen & Bennet, 2010) report, this analysis aimed at identifying what and where the opportunities are and reducing leakage which in turn will help retain the tourist dollar into Seychelles' economy. Among the issues that were reported to hinder delivery of service and products includes shortage of resources such as transport, management and labor. With all the issues identified, few areas were selected for the design of diagnostic measures which

include increased supply of local agricultural produce to the tourism sector, training of personnel, particularly mature students and lastly, additional support to micro and small business in tourism.

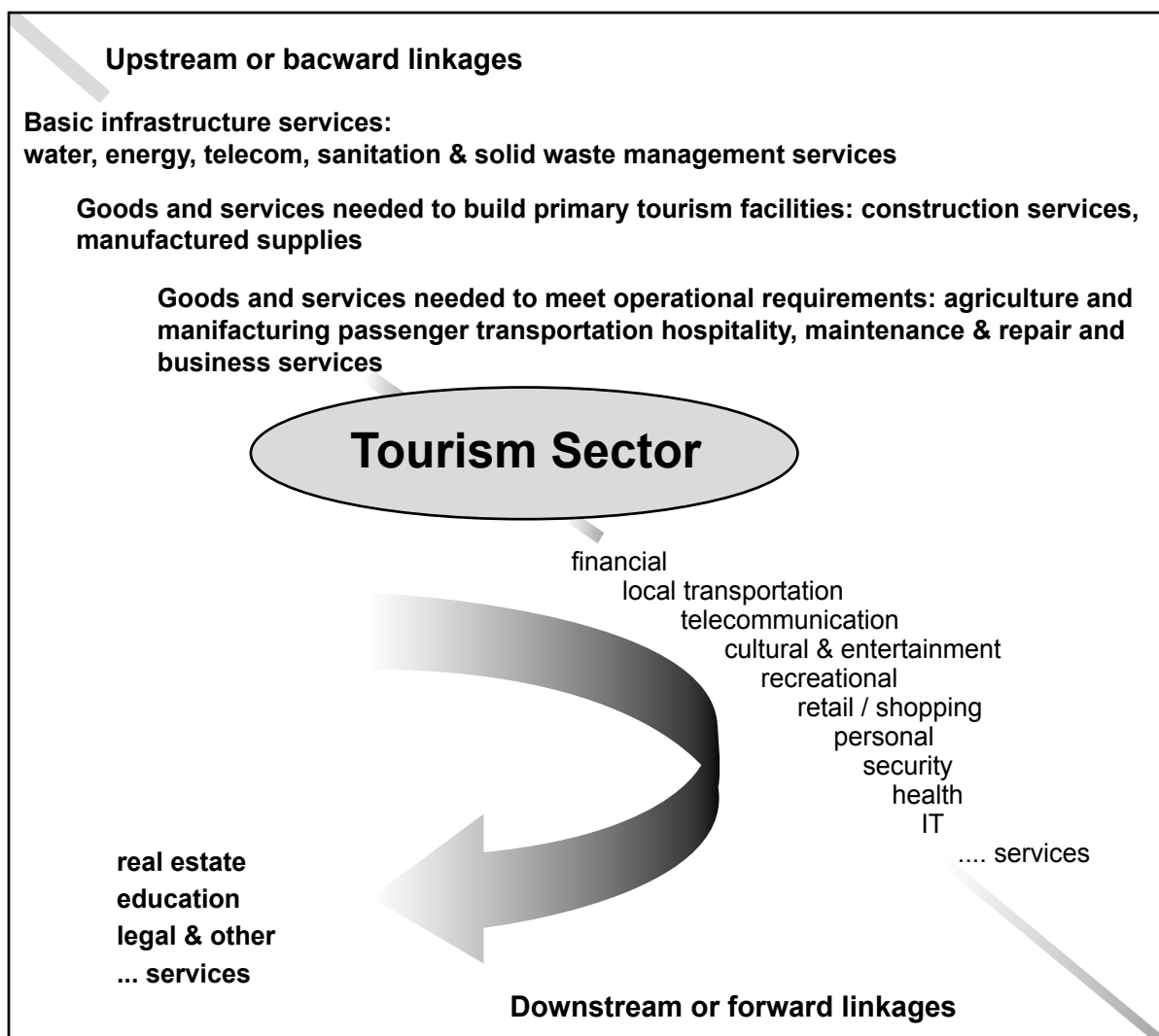
From the literature presented, it is quite evident that value chain analysis in the tourism industry is of great importance. Of significance are the cases from different countries which have demonstrated issues unveiled after conducting value chain analysis. Furthermore, the issues unveiled have contributed to the improvements in terms of interventions related to tourism value chains. Thus, it is of significant that The Gambia undertake the value chain analysis so as to identify areas for improvement and recommend necessary policies to harness its tourism industry.

### 2.3 Tourism linkages

The value chain describes the full range of activities which are required to bring a product or service from conception, through the different phases of production (involving a combination of physical transformation and the input of various producer services), delivery to final consumers and final disposal after use. Tourism value chain encompasses many stages ranging from bookings with travel agents to airline carriers, hotel accommodation, excursions and tours. Tourism economic linkages can be upstream/ backward and downstream/ forward linkages. Backward linkages, for instance, entail the provision of goods and services that facilitate the production of tourism specific and related services, such as basic infrastructure, supply of materials for construction of visitor facilities and supply of agricultural produce to hotels.

This is illustrated through several linkages as reflected in Figure 28 below.

Figure 3: The tourism value chain

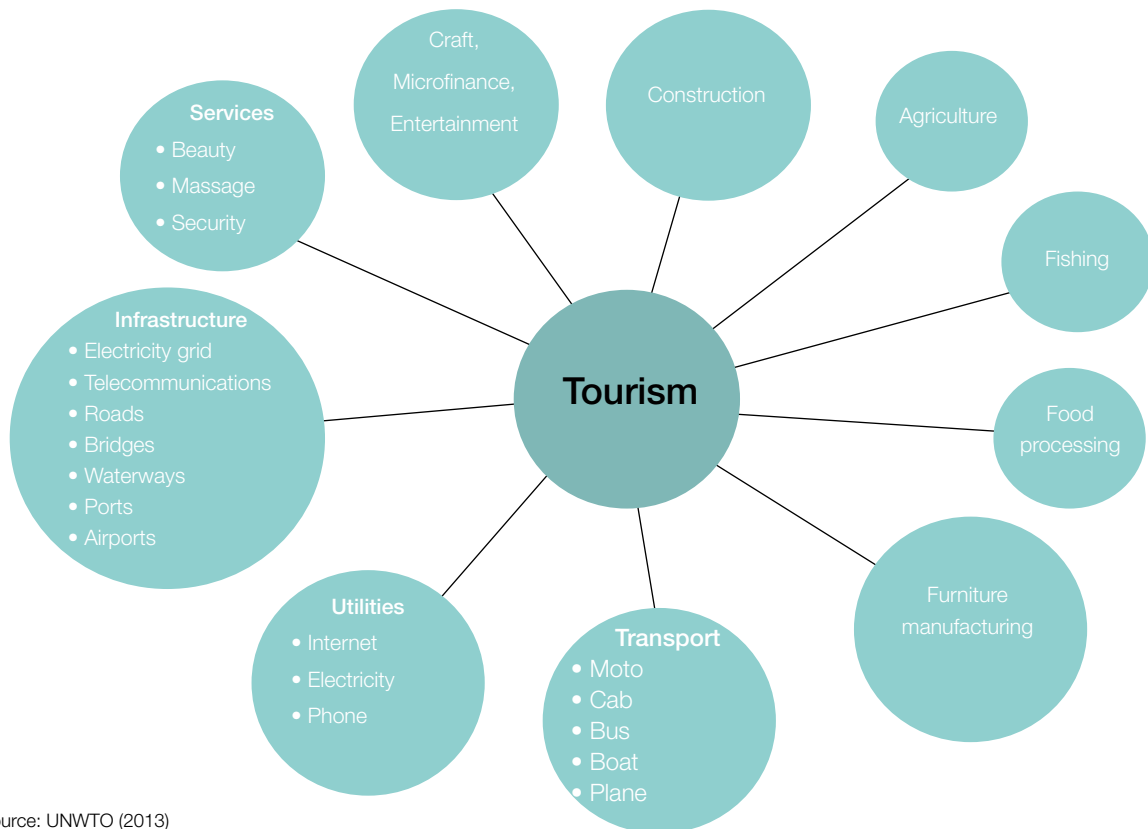


Source: UNCTAD, 2007

The significance of linkages lies in the fact that strong linkages catalyze a multiplier effect that generates broad-based economic benefits at the national level as well as employment opportunities and reduce poverty at the local level. Without strong tourism linkages, such benefits do not materialize. Tourism has great potential of helping Gambia to generate sufficient foreign exchange earnings and other benefits. This is possible with better integration of the tourism sector in the larger host economy (as shown in Figure 4 below). Over the years, tourism in developing countries such

as Gambia has been heavily dependent upon foreign investment. As a result, policy makers have little or no control over the nature of its development, scale, or even target markets. Overseas tour operators exercise significant powers in terms of choice of destinations and types of holiday sold. They prefer engagements in inclusive tour packages which ensure the bulk of the visitor revenue is retained in the source markets with minimal expenditure in the destinations. These practices do not foster linkages.

Figure 4: Tourism’s link with other economic activities



Source: UNWTO (2013)

Among the measures that can enhance tourism economic linkages are a) procuring goods and services locally within host communities, b) establishing joint ventures between the private sector and the host

communities, c) developing cultural and heritage tourism products and d) building the host community’s entrepreneurial capacity.

In order to improve linkages with the host community, there is need for monitoring and improvement of local career opportunities, strengthening of stakeholder participation, seeking local community opinion, improving local's access, creating tourism awareness, preventing exploitation, supporting host community, improving visitor satisfaction and supporting local entrepreneurs and fair trade. The linkage of the tourism sector with the rest of the economy needs to be strengthened so as to deliver on given targets. This may be achieved through further innovations and enterprise development. Enhanced collaboration and joint-ventures between investors and the local communities can spur local development and hence reduce poverty incidences. In addition, Linkages between tourism sub-sectors can be strengthened by linking suppliers to tourism enterprises, developing partnerships between wholesalers and local tourism operators, promoting agro-tourism and other related activities, and disseminating information on tourism investment opportunities.

Agriculture is the mainstay of the economy particularly in the rural areas where incomes and employment are mainly dependent on the sector. Linkages between the tourism and the agricultural sectors may be strengthened by increasing agricultural market demand, identifying the needs of buyers, mapping supply chains, enhancing agricultural supplies to tourism markets, matching supply and demand, developing business plans. Agro-tourism activities may cover farm-stays and tea/coffee/flower estate tourism. Most community-based tourism enterprises in the rural areas provide handicrafts, food and beverages for purchase by visitors. Despite this fundamental interconnection between the two sectors, linkages between the tourism sector and the agricultural sector and other productive sectors of the economy are not well defined due to the lack of a comprehensive Input-Output tables.

# CHAPTER III METHODOLOGY



### 3.0 Introduction

The section below discusses the study methodological approach applied for the study. Mixed approach of quantitative and qualitative methods has been discussed.

#### 3.1 Quantitative method

In quantitative method, Input-Output (I-O) analysis was applied to analyse the trade in service sector of Gambia as well as assess structural changes and linkages between sectors with emphasis on tourism related subsectors. Analysis based on I-O approach highlights key results in Gambia's hotel and restaurant sectors. The Gambia does not have I-O tables for both the service and tourism sector yet, however, time series of datasets from 1970 to 2015 for The Gambia are readily available at the EORA website.

The data files available at Eora website ([www.worldmrio.com](http://www.worldmrio.com)) were used. In this economy, 25 industries (Agriculture; Fishing; Mining and Quarrying; Food & Beverages; Textiles and Wearing Apparel; Wood and Paper; Petroleum, Chemical and Non-Metallic Mineral Products; Metal Products; Electrical and Machinery; Transport Equipment; Other Manufacturing; Recycling; Electricity, Gas and Water; Construction; Maintenance and Repair; Wholesale Trade; Retail Trade; Hotels and Restaurants; Transport; Post and Telecommunications; Financial Intermediation and Business Activities; Public Administration; Education, Health and Other Service; Private Households; Others; Re-export & Re-import) and six final demand (Household final consumption; Non-profit institutions serving households; Government final consumption; Gross fixed capital formation; Changes in inventories; Acquisitions less disposals of valuables) were considered for analysis. As a result, we focused our analysis on 2013, 2014 and 2015 respectively to look at structural changes in the economy during these periods.

For the qualitative approach, a case study approach where by structured interviews were conducted at firm level along the tourism value chain. A case study approach is used since it allows data collection at firm level of aggregation and captures service supplied within the firm or group, in addition to arm's

length commercial transactions (Shepherd, 2019). Furthermore, with a case study it is possible to analyze units such as tourism which are spread across other sectors like transport, travel and restaurants and hotels (Shepherd, 2019).

Given the methodology at hand, probability sampling was employed for the selection of firms. The selection took into consideration factors such as location, size and type of firm. The selected firms consisted of hotels, tourist taxi garages, Restaurants, Craft Markets & Attraction Centers, Bird Watchers, Tour Guides as well as Tour Operators. Data collected from the interviews was analyzed to provide an insight for each sector involved in the tourism service sector value chain.

#### 3.2 Qualitative method

##### 3.2.1 Sample Size

For this study, a sample size of seventeen establishments was considered sufficient. Considering that the true variability of key economic indicators of interest in the sectors for Gambia, the sample size was computed and adjusted for non-response. The sample size was enough to achieve desired precision for the estimates. To achieve the desired precision for the survey estimates, there was need to adjust the sample size for the anticipated response rate. Although, this study or any other pilot study was not previously conducted on the firm population in the country to inform us about how response rate would be, the sample size was adjusted based on the expected response rate of 90 per cent. In order to achieve good precision, the survey response rate should not be below the expected response rate. For interpretation purposes, it is important to note that this sample size represents 7.08 per cent of firms on the sample frame.

##### 3.2.2 Sample design and selection of respondents

The objective of this sample design is to produce results that are illustrative and not necessarily representative at national level. The survey results and case studies obtained from small number of firms selected cannot be used to infer to the population of firms in the country as a whole. However, careful selection was considered to ensure that estimates are obtainable at lower level of disaggregation. Therefore, we considered probability



sampling methodology. Recalling that a probability sample can only be drawn from an existing sampling frame which is complete and exhaustive, a register of all Hotels, Tourist Taxi Garages, Craft Markets and Attraction Centers, Bird Watchers, Tour Guides, Tour Operators and Restaurants was obtained from The Gambia Tourism Board. This register was used as the sampling frame covering all the units for the target population. Additionally, in terms of coverage and organization, this frame is officially the best available. Before drawing the sample, a detailed study of the frame was conducted to establish consistency and adequacy.

A stratified one-stage design was considered for the Survey. We have a total of seven subsectors (Hotels, Tourist Taxi Garages, Craft Markets and Attraction Centers, Bird Watchers, Tour Guides, Tour Operators, and Restaurants) which served as our strata.

Stratification by subsectors was done to ensure representation of establishments within these subsectors in the sample. Then all the establishments within the subsectors were sorted to achieve implicit stratification. Within a stratum, a simple random sample of six hotels, two tourist taxi garages, two craft markets and attraction centers, three tour operators, one from each of bird watchers and tour guides, and two restaurants was drawn and the results are presented in Table 2. Senior management of these selected establishments were identified and interviewers were tasked to visit them and administer the questionnaires. The respondents from these selected establishments, were the most knowledgeable persons among the senior management in terms of finance and overall operational environment of the establishment were eligible for interview.

**Table 2: Distribution of selected firms and sampling weights**

Strata	Establishment	Inclusion probability	Weights
Hotels	Cocoa Ocean Resort	0.0178	56.0004
	Senegambia	0.0178	56.0004
	Paradise Hotel	0.0178	56.0004
	Kairaba Hotel	0.0178	56.0004
	Sheraton/Apranda Hotel	0.0178	56.0004
	Sea View Hotel	0.0178	56.0004
Tourist Taxi Garages	Senegambia Garage	0.1250	8.0000
	Bijilo/Cocoa Ocean Garage	0.1250	8.0000
Attraction Centers & Craft Markets	Senegambia Craft Market	0.1428	7.0000
	Makasutu	0.1428	7.0000
Bird Watchers	Association of Birdwatchers	0.0769	13.0000
Tour Guides	Association of Tourist Guide	0.1666	6.0000
Tour Operators	Discovery Tours	0.0333	30.0003
	Gambia Tours	0.0333	30.0003
	African Adventure Tours	0.0333	30.0003
Restaurants	Ali Baba	0.0081	121.9959
	La Parisienne	0.0081	121.9959

Source: Author

### 3.2.3 Sampling weights

Sampling weights are important factors for adjusting imperfections and non-response in the sampling frame. To make the distribution of our sample close to the true population distribution of establishments in the country, it is important to use survey weights as it accounts for the chances of particular establishments being selected in the sample. Once an establishment is randomly selected, the selection probabilities are generated. Weights are the inverses of these selection probabilities. Thus, a weight of 56 means that the interviewed establishment counts for fifty-six similar establishments (hotels) in the country.

### 3.2.4 Sample Coverage and Treatment of Non-response

The receptiveness to Survey by respondents is a very important factor for achieving quality data. In this study, larger establishments with well-known contact addresses were considered. However, several adverse events may prevent data collection and therefore, careful preparations were made to minimize such problems. Potential respondents as representatives of establishments may refuse participation, establishments may be locked down during data collection period or senior management may have travel during data collection. Various measures including setting up appropriate appointment, leaving the questionnaire with respondents and repeated visits were made to ensure very high response rate.

Of the 17 firms selected for the sample, all were successfully found. However, one of the hotels refused an interview resulting to a response rate of 94.12 per cent.

### 3.2.5 Data collection and treatment of confidential information

The survey was conducted in two phases. The first phase lasted for 10 days and the tool was administered to small establishments such as tour operators, tourist taxis, tourist guides and bird watchers, which were for the relatively smaller establishments. This was to monitor the flow of the questions and how the respondents will react for better planning in the second phase of the exercise. The second phase lasted for 15 days making it a total of 25 days of data collection. In the second phase the tool was administered to hotels.

Major lessons learnt from phase one were: i) Establishment owners or managers provides detailed answers to the questionnaire as compare to middle level managers and ii) gaining the trust of the respondents was difficult given that Project was not publicized and there was no publicity about the survey before it commenced. These were addressed using the following approached; i) we insisted on talking to the manager or at worse the finance or HR/Admin manager and ii) Request for a cover letter from the Ministry of Tourism and Culture and this letter was sent to the sampled establishments.

The data was entered and names of establishments were replaced with serial numbers to anonymize the data from establishments. Standard operating procedures to ensure that the collection and analysis of data was reliable, consistent, reputable, and appropriate to address the objectives were followed. In order to ensure consistency in the implementation and completion of specific tasks and for users to have confidence in the results, the following activities were carried out:

Training of all the staff involved in this Survey was thoroughly conducted to ensure that the tool is well understood. It was to ensure that definition of concepts and terms were understood and followed.

Contact details of the senior management of firms that were selected for the Survey were obtained prior to visiting the firms for data collection. Careful procedures were followed to ensure that right respondents were identified and contacted.

As expected, senior management personnel in the firms were usually very busy and often had little time to respond. However, appointment times convenient to the respondents were arranged and followed. Firms whose management did not respond during first visits either because they had travelled, attending meetings and so on, were revisited three times to collect data. After the third visit and still no response, questionnaires in such firms can then be treated as not available for interview.

Understandably, within the firms, senior management are usually familiar with day to day financial and operational management of the firms. In the event that a particular senior management was contacted and found extremely engaged on other activities that could

not allow him or her to answer the questionnaire, other potential senior staff available could serve as replacement and respond to the tool. This is perfectly acceptable given that firms were selected at design stage and not individuals.

As to be anticipated, some respondents in the firms may out rightly refuse to participate in the Survey. Some may choose not to or reluctantly answer some specific questions in the tool. Therefore, we have clearly informed the respondents that information collected is kept strictly confidential. It was explained to the respondents that no information provided by any individual will be made available to any government agencies or private sectors. As such, all information collected will be used solely in the preparation of tables showing group totals, group charts and not a particular firm information.

### 3.3 Limitations of the Study

The study was limited by several factors. First, some establishments were closed during the time of the

survey and this affected the response rate and extra amount of effort and time spent on call backs. There was also little or no corporation of the sampled establishments regarding the question on turnover during the survey; this led to a 99% of refusals missing values for the variable. The survey was conducted in lean season when most of management of establishments were on vacation and this made it difficult to access them at the establishments. Additionally, the sampling frame of the small tourism establishments were mostly centered on tourist taxis reducing the sample size of the establishments such as the tourist attraction centers and craft markets. It was difficult to capture some of the establishments like the supermarkets and travel agencies due to their nature of operation and finally, the lack of a Tourism Satellite Account for Gambia was a challenge and therefore most of the statistics about tourism were based on estimates which do not meet international best practices and this could lead to absurd decisions being made.

# CHAPTER IV

## RESULTS AND DISCUSSION



4.1 Tourism service sector value chain mapping results

It is evident that there are components of the tourism service sector value chain in Gambia which are yet to be effectively exploited despite achieving a relatively high multiplier effect such as upcountry eco and cultural tourism. For example, the cultural and natural attractions along River Gambia are yet to be utilized such as the Kunta Kinteh Island and Wassu Stone Circles - both World Heritage Sites. To exploit such opportunities there is a need to have enabling environment (infrastructure and skilled workers) in place to attract more investment. Development of eco and cultural tourism help in retaining the authenticity of a destination, protecting peoples heritage, environment and cultural values (see Appendices 4).

Religious tourism has not been exploited in Gambia.

Despite being a Muslim majority country, Gambia is most religious tolerant country in the sub-region. Establishment of Gambia as a religious tourism destination will attract Christian tourists from the sub-region and Nigeria in particular. Recently, Nigerian Pastors and Fathers have been visiting Gambia for religious crusades. Religious tourism development in Gambia can play a major role in diversification of the products offer for the destination (see Appendices 3).

Local producers/actors lack the capacity to supply the needed service/products, thus, leaving avoid for foreign competitors [mostly from Senegal] to fill. This could be attributed to poor infrastructure, insufficient skilled worker force, government regulation and taxation, access to finance, marketing and branding, and other related issues.

**Table 3: Strength Weakness Opportunities Threat Analysis of the Destination - The Gambia**

<p><b><u>Strengths</u></b></p> <ul style="list-style-type: none"> <li>• The development of Tourism Mater Plan for the destination</li> <li>• Important cultural sites, UNESCO World Heritage Sites, suggests strong potential for cultural tourism</li> <li>• Strong cultural attractions in up-country, potential as hub and excursion tourism</li> <li>• Conservative family value orientation suggests potential for family tourism</li> <li>• Low hotel prices, relative to Senegal, despite high occupancy rate</li> </ul>	<p><b><u>Weaknesses</u></b></p> <ul style="list-style-type: none"> <li>• None or poor implementation of the plan</li> <li>• Limited airport size, quality and flight destination flexibility</li> <li>• Limited hotel capacity</li> <li>• Less diversity in accommodation and tourism products in general</li> <li>• Limited web presence</li> <li>• Limited human resource capacity (language, hospitality services) and training capacity</li> <li>• Lack of branding of handicraft and other local products</li> <li>• Absences of a Tourism Satellite Account</li> </ul>
<p><b><u>Opportunities</u></b></p> <ul style="list-style-type: none"> <li>• Stable political climate</li> <li>• Rising insurgencies in other countries within the region</li> <li>• Inclusion of improvement of agriculture value chain by projects</li> <li>• High religious tolerance, suggests strong potential for religious tourism</li> <li>• The serious displayed by “bumsters” indicates an inner resourcefulness which can be tapped to the benefit of all in a more positive way such as; turning them to professional tourist guide, birdwatchers etc.</li> </ul>	<p><b><u>Threats</u></b></p> <ul style="list-style-type: none"> <li>• Multi-destination tourism</li> <li>• Depleting infrastructure and the absence of it in up-country</li> <li>• Increased interest in the destination by international tour operators</li> </ul>

Source: Author

#### 4.2 Discussion of qualitative data issues and reliability

Data collection tools were simple and straightforward and were easily understood by respondents. Overall, response rate was good. However, we have received some item nonresponse; for all the questionnaires except one. This item nonresponse was as a result of respondents refusing to report their global turnover. It is only one respondent who reported their global turnover. For the precision of estimates that we have computed, the effect of design features were not quantified. However, to maximize reliability, the extent to which respondents from selected establishments answer questions in similar ways, we have compared results from the pretest and confirmed a close agreement in the instrument. Since the variables

remained unchanged and the respondents have enough time to answer the questionnaire, the estimates of the indicators were reliable.

#### 4.3 Qualitative Survey Results

The purpose of this case study is to identify and quantify the tourism service sector value chain. The results will help provide information on how best Gambia can harness its tourism sector through improvement of services along the value chain.

Table 4.2 shows that most of the firms interviewed were hotels with 31 per cent, this followed by tour operators with 19 per cent. The least was recorded by Bird watchers and Tourist Guides with 6.3 per cent each.

**Table 4: Distribution of interviewed entities by line of business**

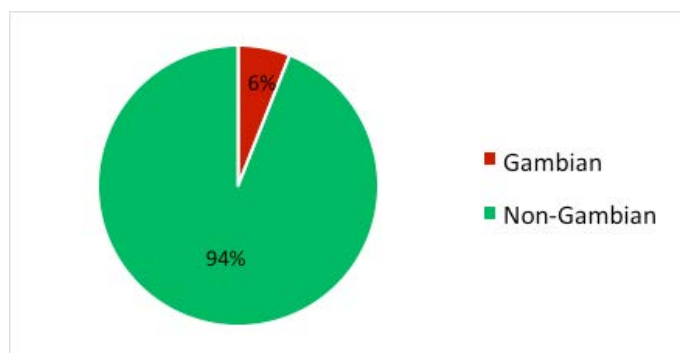
Line of Business	Count	Percent (%)
Hotels	5	31.30
Restaurants	2	12.50
Tourist Taxi Garages	2	12.50
Attraction Centres	2	12.50
Bird Watchers	1	6.30
Tourist Guide	1	6.30
Tour Operators	3	18.80
Total	16	100.00

Source : Author from survey

Figure 5 shows that the distribution of market of operation of the establishments. In this study, market of operation is defined as the nationality of the majority shareholder(s) of the surveyed firms. The data indicates that 94% of the interviewed establishments

are owned by non-Gambians with only 6% of the establishments owned by the Gambians. This is a clear indication of tourism leakages which negatively impact a destination economically.

**Figure 5: Percentage distribution of market of operation**

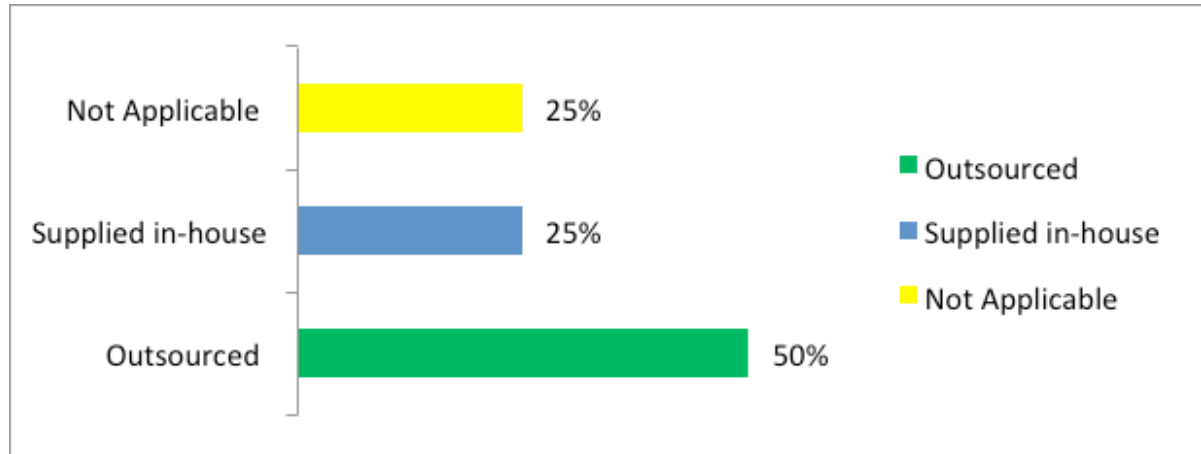


Source : Author from survey

Figure 6 shows the distribution of transport services as per the providers/suppliers of the service. The study findings demonstrate that half (50%) of the establishments outsource transport services, while

25 per cent provide the transport services in-house. However, 25 per cent of the establishments do not use the transport services.

**Figure 6: Percentage distribution of transport service use by supply nature**

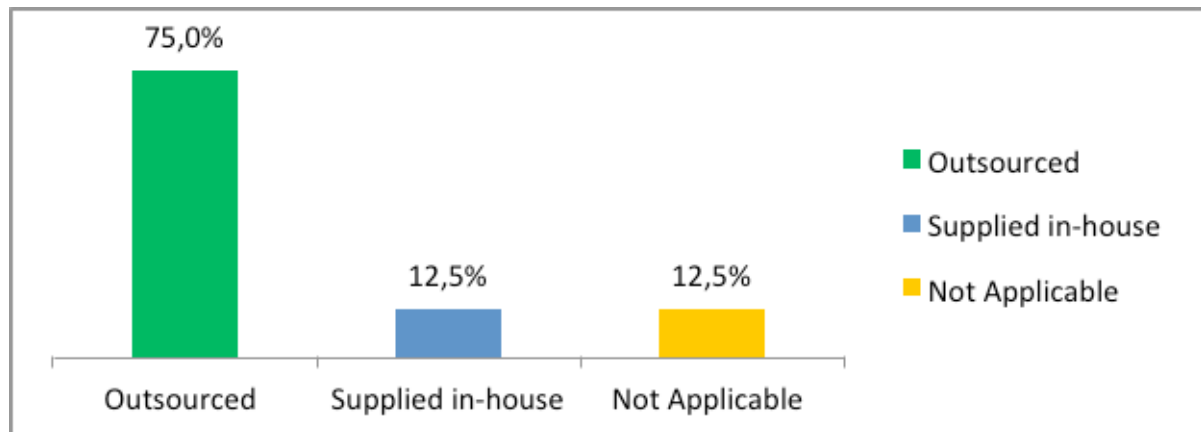


Source : Author from survey

Provision of waste collection services was asked during the survey. Figure 7 indicates that, for all the 16 establishments interviewed, majority of the establishments accounting for 75% outsourced the

waste collection services. The establishments that had in-house waste collection services recorded 12.5% while the other 12.5% establishments indicated that they did not have the waste collection services at all.

**Figure 7: Percentage distribution of Waste collection service by supply nature**

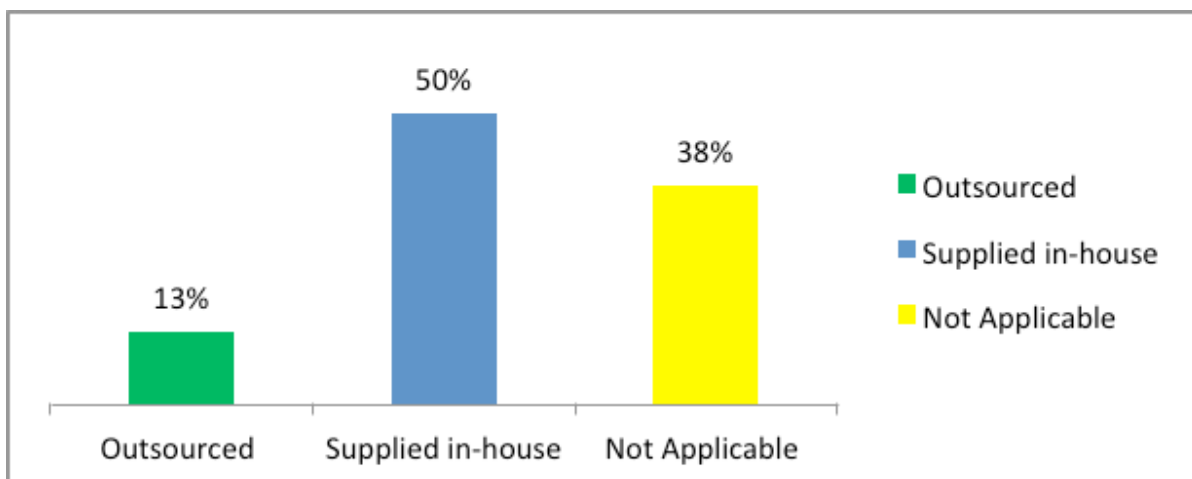


Source : Author from survey

Figure 8 shows the response rate on the supply of security services. The findings of the survey shows that 50% of establishment supplied security service in-house and only 13% of the establishments outsourced

the service. However, 38% of the establishments reported that they do not use the security services

**Figure 8: Percentage distribution of security service by supply nature**

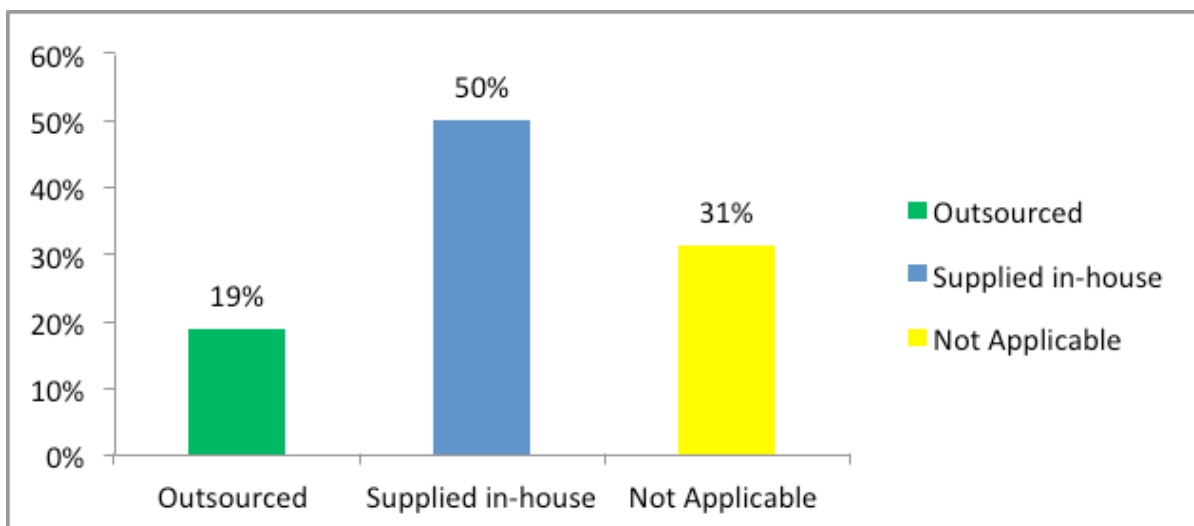


Source : Author from survey

Figure 9 shows the response rate on the provision of catering services. The data demonstrated that 50% of the establishments interviewed provide catering

services in-house and 19% of the establishments outsourced the service. However, 31% of the establishments did not provide catering services at all.

**Figure 9 : Percentage distribution of catering service by supply nature**

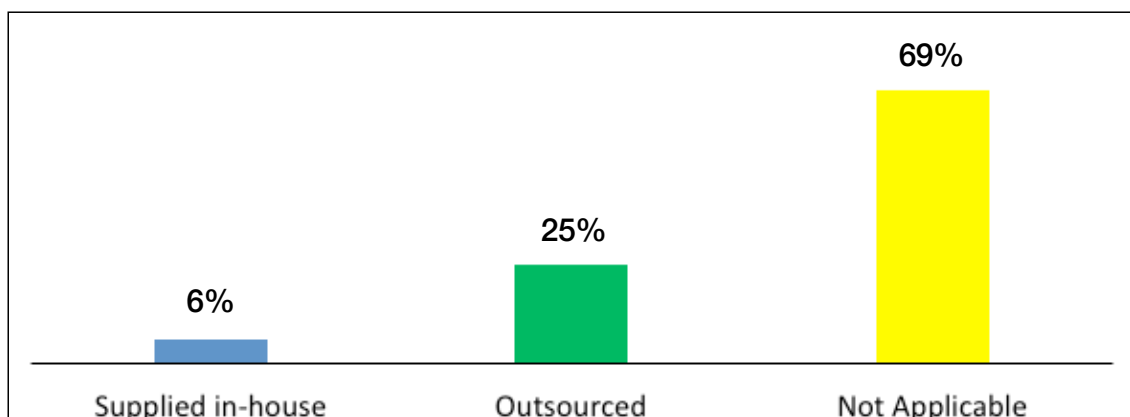


Source : Author from survey

Figure 10 shows the response rate on the provision of medical services. The findings indicate that 69% of the establishments have no provision of medical services.

However, 25% of the establishments outsourced their medical services while 6% of the establishments provided their medical services in-house.

**Figure 10: Percentage distribution of medical service by supply nature**



Source : Author from survey



All the interviewed establishments who successfully participated in the study reported that recruitment, procurement, recreation, gardening, auditing, accounting and cleaning services are supplied in-house, while other services such as provision of gas and electricity, broadband, visa and immigration, company registration and legal services were outsourced. However, all the establishments interviewed indicated that they do not seek business consultancy and public relations services.

It is of note that firms choose to do in-house supply of those services that are directly and closely linked to the identity of the company (design, engineering); to the reputation and safety of the product (quality assurance control services and repair and maintenance services); or those that involve sensitive financial information. On the other hand, reasons for outsourcing of services by the firms are attributed to specialized skills, efficiency considerations, network economies, cost considerations and government regulatory requirements (such as the legal requirement to contract out the auditing services and the customs brokerage services at the port) as well as integration into the domestic economy in order to build networks of domestic capability, especially among SMEs.

A major highlight of the qualitative survey as demonstrated by the study findings shows that all outsourced services used by the interviewed establishments are supplied by firms owned by Gambians or operating in Gambia. This again signifies the significance of tourism to the economy in terms of creation of indirect job opportunities.

#### 4.3.1 Policy Implications

In policy statements, Gambia has committed itself to a rapid increase in visitor numbers and increasing numbers of up-market tourists. However Gambia is apparently unable to provide, or operate, the corresponding business environment on which this increased demand depends. In order to ensure successful implementation of sustainable tourism that benefits the populace, stakeholders need to actualize sustainability practices at all stages of the value chain, such as accommodation, travel, hospitality and construction activities.

Traditional styles and standards of Gambian life need to be maintained to ensure an authentic and rewarding experience to the visitors, and further the goal for cultural preservation. Locally grown or manufactured products should be used to promote local businesses and boost local economy. Not only would this help ease the pressure on dwindling resources but also promote commodities and products unique to the Gambian landscape.

Community participatory frameworks need to be developed in order to encourage active participation of local communities, especially the poor and the marginal groups, in tourism activities. Stakeholders should consider holding regular awareness meetings, feedback forums and action committees to enhance community involvement, creating a sense of belonging of the locals to the tourism value chain. An effective coordination mechanism needs to be in place to harness the above interventions in order to bring about a quality tourism product.

#### 4.3.2 Concrete Action

The constraints that are holding back the growth of the Gambian tourism sector are well-highlighted and can be remedied with the implementation of relatively straightforward policy measures to create the enabling environment. The enabling environment for tourism requires urgent attention. The high level policy commitment to tourism is unusually prominent and tourism policy is generally sound – the problem is that these policy commitments are not always implemented rigorously. There is urgent need for action on:

- Provision of adequate infrastructure;
- Broadening the range of accommodation available;
- Human resource development;
- Providing support to Gambia tourism and hospitality institute;
- Destination marketing in the region;
- Reducing the seasonality of tourism demand;
- Enhancing accessibility;
- A strategy to encourage a more up-market tourist product; and

- Effectively implementing tourism policy.
- Development of Gambia Tourism Satellite Account

These are issues where the government should take a lead, in close partnership with the private sector.

#### 4.4 Quantitative Results

Analysis based on quantitative approach highlights key results in The Gambia's hotel and restaurant sectors. Although series of datasets for The Gambia are readily available at the EORA website, this analysis is focused on the years 2013, 2014 and 2015 respectively. Relevant tables that were generated are presented in the appendix of this report.

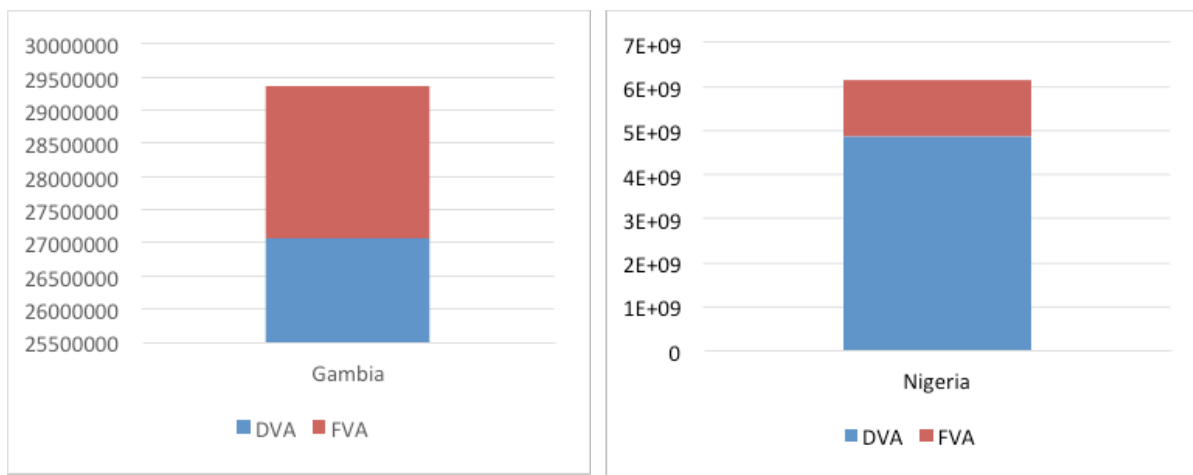
For purchaser price<sup>1</sup> 2015, the Leontief inverse matrix shows that for an extra unit of final demand in hotel and restaurant sectors in The Gambia, production needs to be increase by 0.405203 units after accounting for all direct and indirect (knock-on) effects.<sup>2</sup> In the same period, the basic prices<sup>3</sup> data shows that for an extra unit of final demand in the same sectors, production needs to rise by 0.214325 units after accounting

for all direct and indirect effects. In the preceding year (2014) for purchaser prices, for an extra unit of final demand in The Gambia's hotels and restaurant sectors, production needs to rise by 0.3799. For basic prices data, production in these same sectors need to increase by 0.2143 for any extra unit of final demand.

In 2015, purchaser price data shows that the value added share of total output in The Gambia for hotels and restaurants is 19.77%. For Basic Prices in the same year, the value added share of total output in the country for these same sectors is 56.84%.

Results in Figure 11 contain the set of value added contributions for Purchasers Price in 2015. As shown, the total domestic value added in exports (DVA)<sup>4</sup> in hotels and restaurants in The Gambia is 27,068,547.58 while for foreign value added (FVA)<sup>5</sup> from all sectors and origins incorporated in The Gambia's exports in hotels and restaurants is 2,286,782.42. Comparatively, in the same year, total domestic value added in exports in hotels and restaurants was higher in Nigeria than in The Gambia.

Figure 11: Gross export in the hotels and restaurants for The Gambia and Nigeria (Purchasers Price, 2015)



Source: Author from EORA database

1. retailers (by definition, their output) as well as transport margins (that is, any transport charges paid separately by the purchaser) and non-deductible VAT.

2. This measure assesses the effects on the economy of an exogenous change in final demand for the output of a given industry i.e. estimates the interdependence between an industry and the rest of the economy.

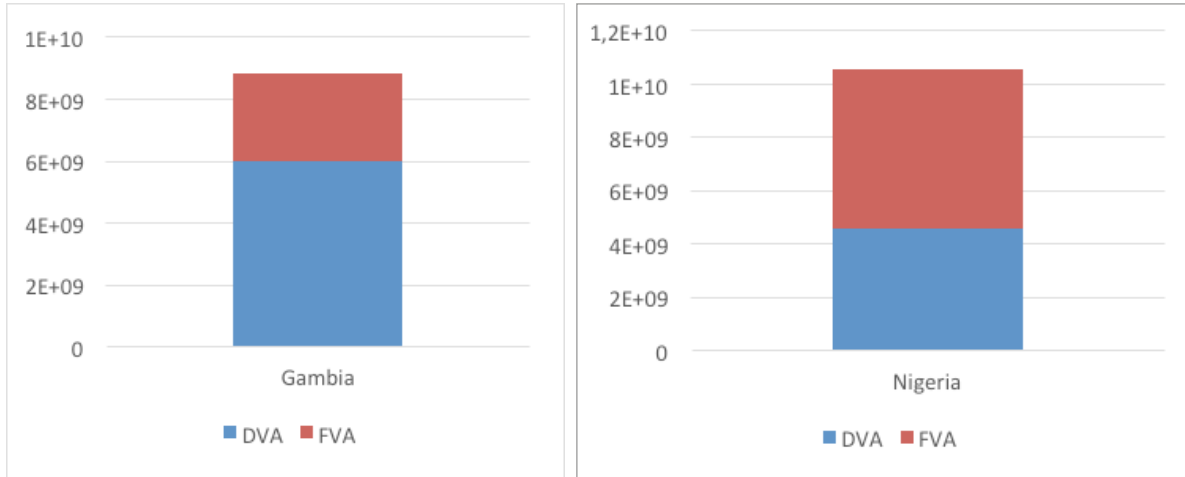
3. Basic price is the amount receivable by the producer exclusive of taxes payable on products and inclusive of subsidies receivable on products.

4. DVA in exports are the value added in exports whose outputs are produced by domestic industries

5. FVA in exports are the value added in exports whose outputs are produced by foreign industries i.e. Vertical Specialization (VS) or backward participation

For the basic price data in 2014, as presented in Figure 12, total domestic value added in exports in The Gambia was higher than foreign value added from all sectors and origins incorporated in The Gambia's exports in hotels and restaurants.

**Figure 12: Gross export in the hotels and restaurants for The Gambia and Nigeria (Basic Price 2015)**



Source Author from EORA database

# CHAPTER V

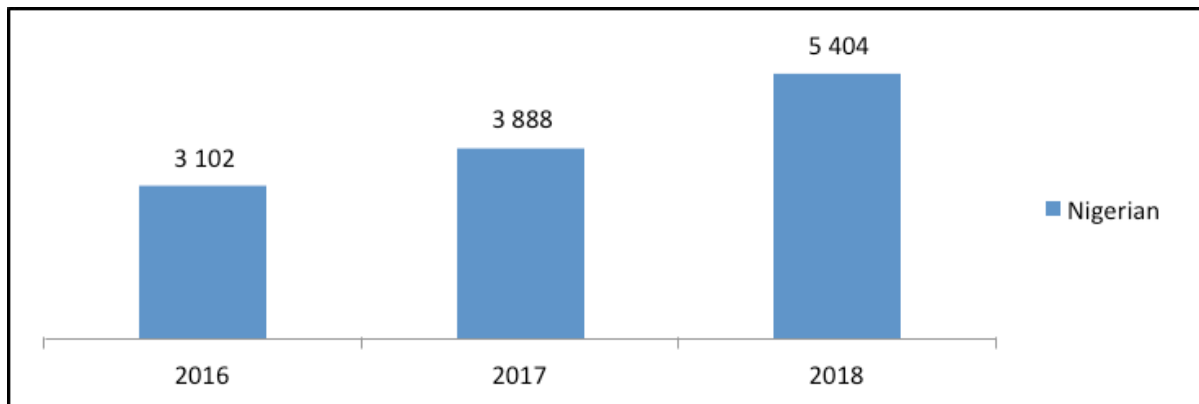
## NIGERIA AS A SOURCE MARKET



This Section pulls together opinions of tourism expert, policy makers and statistics from GTB on Nigeria as a source market for the destination, focusing on how to

increase arrivals from the source. Since 2016, arrival figures for Nigeria in the destination have been on the increase as revealed in Figure 13.

**Figure 13 : Arrivals from Nigeria**



Source: Market, 2016 and 2018

Nigeria is increasingly becoming an important source market for destination with 39 per cent growth rate between 2017 and 2018.

From the discussion with key stakeholders, literature and statistics, the branding of Gambia as a ‘winter sun’ holiday destination is a serious constraint on the attraction of Nigeria tourists given that the climatic conditions in Nigeria is similar to Gambia’s. Lack of choice in accommodation and diet in Gambian tourism relies on a relatively uninspiring menu of modest quality accommodation, Eurocentric menu and other tourism products was also highlighted as limitation. Also revealed as hurdles was the absence of international conference centers to host conferences and meetings as well as non-existence of a standard mall and boutiques.

However, there are encouraging signs that the ‘summer hole’ in occupancies is beginning to be filled, although progress is slow. Destination marketing could have a strong role in re-branding The Gambia. The International Conference Center funded by China is expected to be launched early 2020.

It was brought to the fore that Nigerian mostly comes to the destination as MICE (Meetings, Incentives, Conferences, and Exhibitions) and religious tourist.

**5.1 Concrete Action**

The need to diversify the tourism offering to incorporate needs of the Nigeria source market and other niche markets (birding, fishing, ancestry for those in the diaspora, etc.) is urgent. Table 4 provides some of the concrete actions that can be taken to increase arrivals from Nigeria.

**Table 5 : Concrete Actions to make the Destination Attractive to the Nigerian Tourists**

Action	Lead Agency	Support Agencies
Develop regional tourism market strategy, focusing on MICE and Religious tourism	GTB	GHA, ASSET
Development of MICE business, focusing initially on neighbouring West African countries, Nigeria in particular.	GTB	GHA, ASSET
‘Gambia is Good’ logo for hotels and restaurants – establishment commits to purchasing local produce whenever possible	Famers’ Association	ASSET, GHA, GTB and GCCI
Continuing review of licensing regime to ensure that the balance between food hygiene and other safety issues on the one hand and the support of local enterprise on the other is appropriate	FSQA	GTB, GHA ad ASSET
“Africanisation” of the food menu	GHA	GTB
Introduction of personal handicraft labelling e.g. illustrating the name/location/contact details of the producer	ASSET	
Research on customer requirements via focus group research of visitors	GTB and GHA	ASSET and GBoS

source: Author

## 5.2 Regional dimensions and implications for services liberalization under the AfCFTA

Trade integration enables countries to specialize in the production of goods and services in which they have a comparative advantage, allowing them to take advantage of economies of scale and boost productivity and growth. By disseminating knowledge, technology, and encouraging the production of new products, trade integration can help to drive structural transformation. A broad free trade zone in Africa will boost the region's economic transformation potential. It would not only enhance intraregional trade, but also attract foreign direct investment and make regional supply chains easier to build.

Intraregional trade in Africa has expanded rapidly, and a few regional hubs dominate relatively well diversified trade flows. Intraregional imports as a percentage of overall imports nearly tripled to 12–14 percent, or roughly US\$100 billion, over the last two decades, as numerous new sub-regional economic communities enhanced commerce in the region. In 2017, the main sub-regional communities accounted for three-quarters of African intraregional trade. Regional commercial hubs arose as a result of the process, including Côte d'Ivoire, Kenya, Senegal, and South Africa. Intraregional trade flows, in contrast to exports to the rest of the world, are more diverse, contain greater value-added items, and include a significant share of manufactured products.

If both tariffs and nontariff policy levers are employed, the AfCFTA could greatly expand intraregional trade in Africa. In order to have a major impact on intraregional trade flows, tariff reductions need be comprehensive.

The most ambitious goal under the AfCFTA is to eliminate tariffs on 90% of present intraregional trade flows, which would enhance regional commerce by around 16 percent, or US\$16 billion, over time. Nontariff constraints should be addressed in addition to tariff reductions. Even little advances in resolving these constraints are likely to have significant consequences.

Improving trade operations, such as customs services, and improving infrastructure could be four times more effective than tariff reductions in stimulating trade. Furthermore, lowering nontariff trade barriers would strengthen the efficiency of tariff reductions in expanding trade, particularly in landlocked and low-income nations. As a result, policies aimed at reducing nontariff obstacles, particularly poor trade logistics and infrastructure, should be at the forefront of efforts to promote broader African trade integration.

To ensure that the benefits of regional trade integration are shared by all, policies should be put in place to address the adjustment costs that integration may entail. Trade policies should be linked with structural reforms in less diversified and agriculture-based countries to boost agricultural productivity and strengthen their competitive edge. To offset the predicted revenue losses from tariff reductions, certain governments may need to take measures to mobilize domestic revenues. The temporary negative effects of trade liberalization on income distribution must be mitigated, particularly in nations with more diverse economies, through focused social and training initiatives that promote worker mobility across enterprises and industries.

# CHAPTER VI CONCLUSION



### 6.1 Summary of key findings

The research findings reveal that upcountry eco and cultural tourism in Gambia remain unexploited and although Gambia is the most religious tolerant country in the region which makes it an ideal religious tourist destination, religious tourism is yet to be developed. Furthermore the study findings indicate that there is absence of infrastructure (road, water and electricity) which are a visible impediment to growth of the tourism sector and the inability of local producers to supply raw/finished products leaves a void for foreign producers [from Senegal] to fill.

The study findings indicate that 94 per cent of the firms within the value chain are operated domestically and from the respondents who participated in the study, there are more males employed in the sampled establishments that participated in the study represented by a response rate of 59% and 41% female. The data obtained reveal that only 20% of the establishments provide social insurance and 69% of the establishments interviewed did not provide medical services. Other services such as electricity, water, business registration, visa and immigration are outsourced by the establishments using them. The all-inclusive package is misconstrued by many in the value chain as concerns focused on the question of leakages, loss of government taxes, the dumping of prices, an increase monopoly of international tour operators and the inability of The Gambia to attract other market segments once it is declared an all-inclusive destination.

From Leontief inverse matrix B for Purchasers Price 2015, first cell indicates that for an extra unit of final demand in The Gambia's agriculture sector, production in this sector needs to rise by 1.0509 units, while production in The Gambia's fishing sector needs to rise by 0.003029 units after accounting for all direct and indirect (knock-on) effects. Looking at basic prices for year 2015, for an extra unit of final demand in The Gambia's agriculture sector, production needs to rise by 1.0466 units while production in the fishing sector needs to rise by 0.00167 units after accounting for all direct and indirect effects.

For Purchasers price in 2015, for an extra unit of final demand in The Gambia's hotels and restaurants sectors, production needs to rise by 0.4052 units after

accounting for all direct and indirect effects. In the year preceding (2014) for purchasers price, for an extra unit of final demand in The Gambia's hotels and restaurant sectors, production needs to rise by 0.3799. The 2015 basic prices data indicates that for an extra unit of final demand in The Gambia's hotels and restaurants sectors, production needs to rise by 0.2143 units after accounting for all direct and indirect effects. For 2014 basic prices, an extra unit of final demand in the hotels and restaurants in the country, production needs to rise by 0.2078 units after accounting for all direct and indirect effects.

For Purchasers Price in 2015, the matrix tells us that the value added share of total output in The Gambia for hotels and restaurants is 19.77%. For Basic Prices in the same year, the value added share of total output in the country for hotels and restaurants is 56.84%. According to 2014 Purchaser Price, the value added share of total output in The Gambia for hotels and restaurants was 24.59%. For Basic Prices in the same year, it was 57.14%.

Results in Table 1C contain the set of value added contributions for Purchasers Price in 2015. As shown, the total domestic value added in exports (DVA) in hotels and restaurants in The Gambia is 27,068,547.58 while for foreign value added (FVA) from all sectors and origins incorporated in The Gambia's exports in hotels and restaurants is 2,286,782.42.

The GVC participation index provides an estimation of how much an economy is connected to global value chains for its foreign trade. The indicator is composed of two components reflecting the upstream and downstream links in international production chains. This index is calculated by summing the domestic value added in foreign export (forward participation) and foreign value added in domestic export (backward participation). Therefore, the indicator shows the involvement of a particular sector in Regional/Global value chains through backward and forward linkages. Backward linkages are estimated at 0.0779 based on gross exports of 29,355,330.

Based on the issues arising, there are multiple activities and roles for different players to effectively engage in enhancing tourism development in The Gambia. It is strongly recommended that the existing Tourism Master Plan be updated taking into account the issues



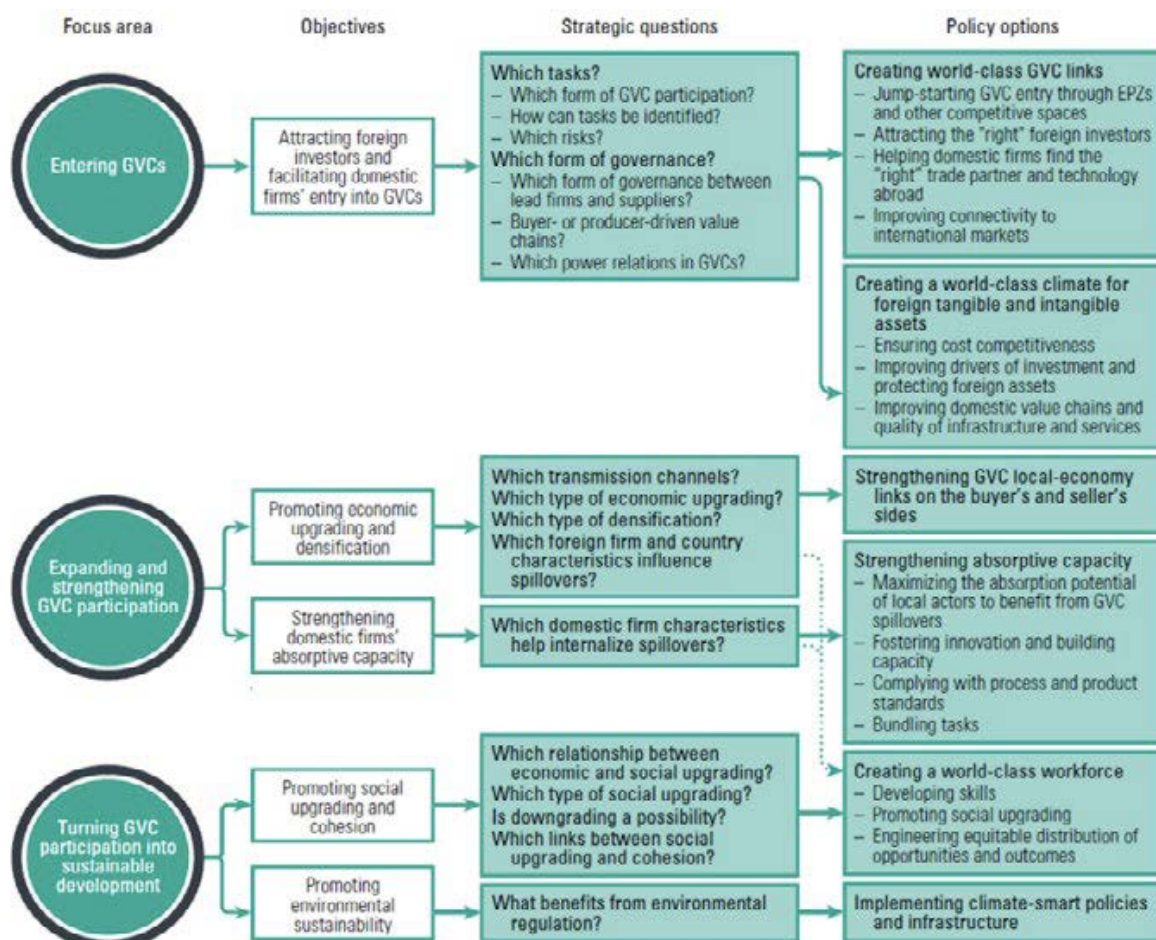
raised in this report related to: infrastructure, human resource development, regulation and taxation, access to finance, marketing and branding and other related issues or develop a Tourism Policy for The Gambia. The Master Plan or Policy can then be the basis for concerted public/private action to enhance value in the Industry for all players. A base-line study to determine the level of linkages between tourism and other economic activities is highly recommended.

The strategic policy framework below focuses on strategies to help maximize gains from participation in GVCs (Table 6). To develop an effective and sustainable strategy of GVC participation, Gambian government must identify key binding constraints and design the necessary policy and regulatory interventions, as well as infrastructure and capacity building, which allow the country to achieve distinct objectives and address specific challenges (Figure 14):

- i. Entering GVCs: attracting foreign investors and facilitating domestic firms' entry into GVCs
- ii. Expanding and strengthening GVC participation (backward and forward): promoting economic upgrading and densification, and strengthening domestic firms' absorptive capacity
- iii. Turning GVC participation into sustainable development: ensuring skill upgrading, social upgrading, and equitable distribution of opportunities and outcomes while promoting environmental sustainability.

The goal is to enable policy makers to make informed choices. All in all, GVCs offer a role to play for economies at different levels of development at any point in time. Economies that have in place a supporting environment and well-functioning institutions can, in addition, move along the value chain, strengthen participation, and achieve higher added value in a sustainable way.

Figure 14: Making Global Value Chains Work for Development



Note: EPZs = export processing zones; GVCs = global value chains.

Source: Daria Taglioni and Deborah Winkler (2016)

Table 6 : Basic Action Frameworks

Priority Area	Linkage to Objective	Proposed Action	Desired Output	Implementation Period/ Status	Estimated Cost (US\$)
Diversification of tourism products offered in destination Gambia	Understand/analyze bottlenecks and opportunities across tourism sector value chains	<ul style="list-style-type: none"> <li>- de-enclave tourism from its coastal confinement by developing up-country tourism</li> <li>-product development to revitalize existing resorts</li> <li>-Move into tourism niche markets especially eco-cultural tourism and religious tourism</li> </ul>	<ul style="list-style-type: none"> <li>-Increased number of international and local tourists visiting Gambia</li> <li>-Wide scope of type and category of Gambia tourism Market</li> </ul>		
Enhancement of adequate infrastructure	Understand/analyze bottlenecks and opportunities across tourism sector value chains	<ul style="list-style-type: none"> <li>-improve hotel standards</li> <li>-establish green hotel Programme</li> <li>-improve infrastructure in TDA and airports</li> <li>-Expand the air transport to curb the overreliance on European charter flights and aircrafts minimizing economic leakages</li> </ul>	Improved and adequate infrastructure supporting tourism service sector		
Reduce seasonality of tourism demand	Understand/analyze bottlenecks and opportunities across tourism sector value chains	<ul style="list-style-type: none"> <li>-Expand tourism activities</li> <li>-Provide niche tourism facilities and activities</li> <li>-Create more exclusive holiday packages with complimentary tourism businesses</li> <li>-Pricing modification strategies</li> <li>-focus marketing on seasons outside summer</li> </ul>	Increased Tourism arrivals and tourist receipts in both off-peak and on-peak seasons		
Research and Extension Services	Measuring and analyzing regional value chains with a view to identify entry points for better integration into Regional Value Chains	<ul style="list-style-type: none"> <li>-Establish a data collection system</li> <li>- Develop and implement Tourism Satellite Account</li> <li>- Enhance data collection, presentation and analysis along the principles of Tourism Satellite Accounts (TSAs) as per the UN-WTO guidelines</li> <li>-Institutional strengthening of MIT and tourism office for a more responsive planning, implementation, monitoring, research and data collection</li> <li>- Initiate supply side data collection</li> </ul>	Data and information availability for decision making and policy formulation, implementation, monitoring and evaluation		

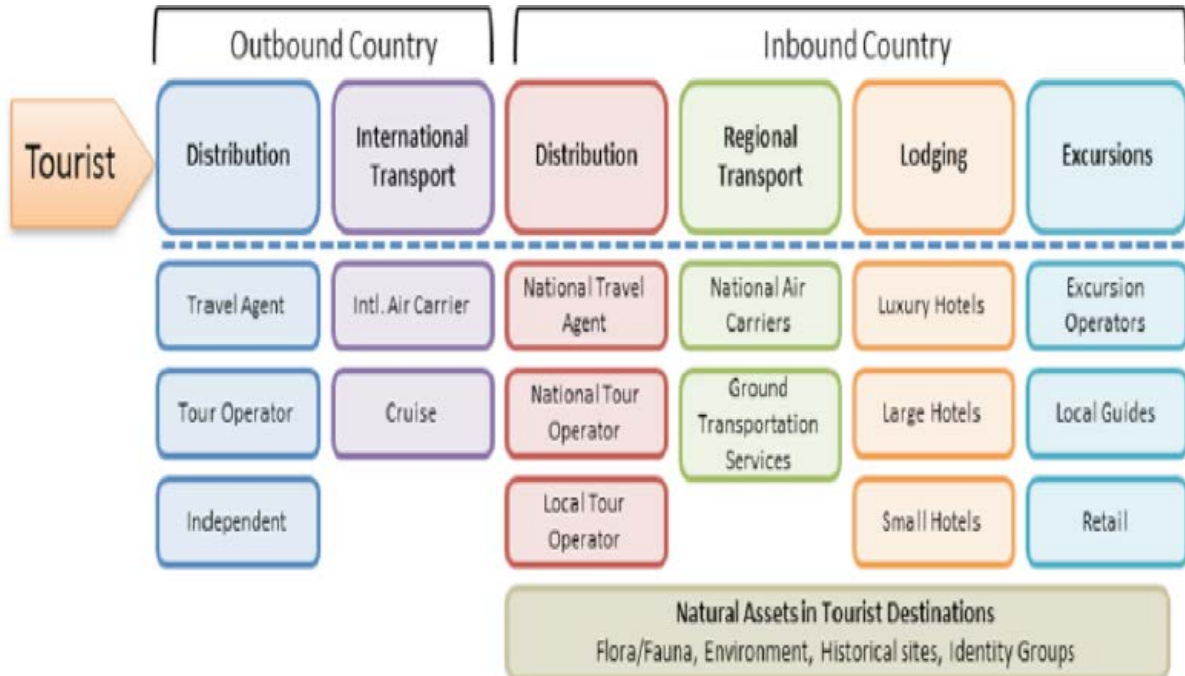
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Research and Extension Services	Measuring and analyzing regional value chains with a view to identify entry points for better integration into Regional Value Chains	<ul style="list-style-type: none"> <li>- Establish a data collection system</li> <li>- Develop and implement Tourism Satellite Account</li> <li>- Enhance data collection, presentation and analysis along the principles of Tourism Satellite Accounts (TSAs) as per the UN-WTO guidelines</li> <li>- Institutional strengthening of MIT and tourism office for a more responsive planning, implementation, monitoring, research and data collection</li> <li>- Initiate supply side data collection</li> </ul>	Data and information availability for decision making and policy formulation, implementation, monitoring and evaluation		
Increasing Sectoral Linkages	Understand /analyze bottlenecks and opportunities across tourism service value chains	<ul style="list-style-type: none"> <li>- Conduct more detailed supply and value-chain assessment of the tourism industry</li> <li>- Link supplier groups to tourism operators such as hotels e.g. link artists (cultural performances), handicrafts and agricultural sectors to tourism markets</li> <li>- Increase access to Gambia from major source markets</li> <li>- Institutional support to producer organizations to encourage agricultural and other linkages</li> </ul>	<ul style="list-style-type: none"> <li>- enhanced inter-sectoral linkages</li> <li>- reduced leakages from the economy</li> </ul>		
Increasing Regional and International Linkages	Enhancing regional dimensions of Tourism Value Chains	<ul style="list-style-type: none"> <li>- Regional joint tourism marketing efforts</li> <li>- Grading, standardization and classification of accommodation and other tourism facilities</li> <li>- Study the impact of East Africa single tourist's visa and the use of IDs</li> <li>- Expand the regional destination specialist training Programme</li> <li>- Joint promotion of key tourism events among the partner states such as Uganda Martyrs day, Magical Kenya Travel Expo and Rwanda's Kite Izina</li> </ul>	<ul style="list-style-type: none"> <li>- acquisition of best practices</li> <li>- economies of scale in production and marketing of tourism products</li> <li>- developed regional products based on themes such as culture</li> </ul>		

Priority Area	Linkage to Objective	Proposed Action	Desired Output	Implementation Period/ Status	Estimated Cost (US\$)
Government regulation and taxation	Understanding/Analyzing opportunities and bottlenecks across tourism service value chains	<ul style="list-style-type: none"> <li>-Enhance financial reporting ,tax compliance and GHA</li> <li>-Review and streamline existing legislation to be more tourism responsive</li> <li>-Increased revenue concessions for those using locally produced goods</li> <li>-Tax relief for training the Gambians</li> </ul>	Creation of Favorable, conducive and enabling environment for tourism business operations		
Marketing and Branding of Gambia as a tourism destination	Understanding/Analyzing opportunities and bottlenecks across tourism service value chains	<ul style="list-style-type: none"> <li>-Widen promotional activities</li> <li>-Ensure quality services offer through fast-track classification of all tourism, establishments</li> <li>-Strengthen GPA manpower and financial capacity to carry out marketing mandates</li> <li>-Education campaigns to minimize negative acculturation of Gambians by tourism</li> </ul>	<ul style="list-style-type: none"> <li>-Improved Destination image</li> <li>-Increased visitors length of stay</li> <li>-Enhanced competitive edge of Gambia destination</li> <li>-Increased tourism arrivals and tourism receipts.</li> </ul>		

Source: Daria Taglioni and Deborah Winkler (2016)

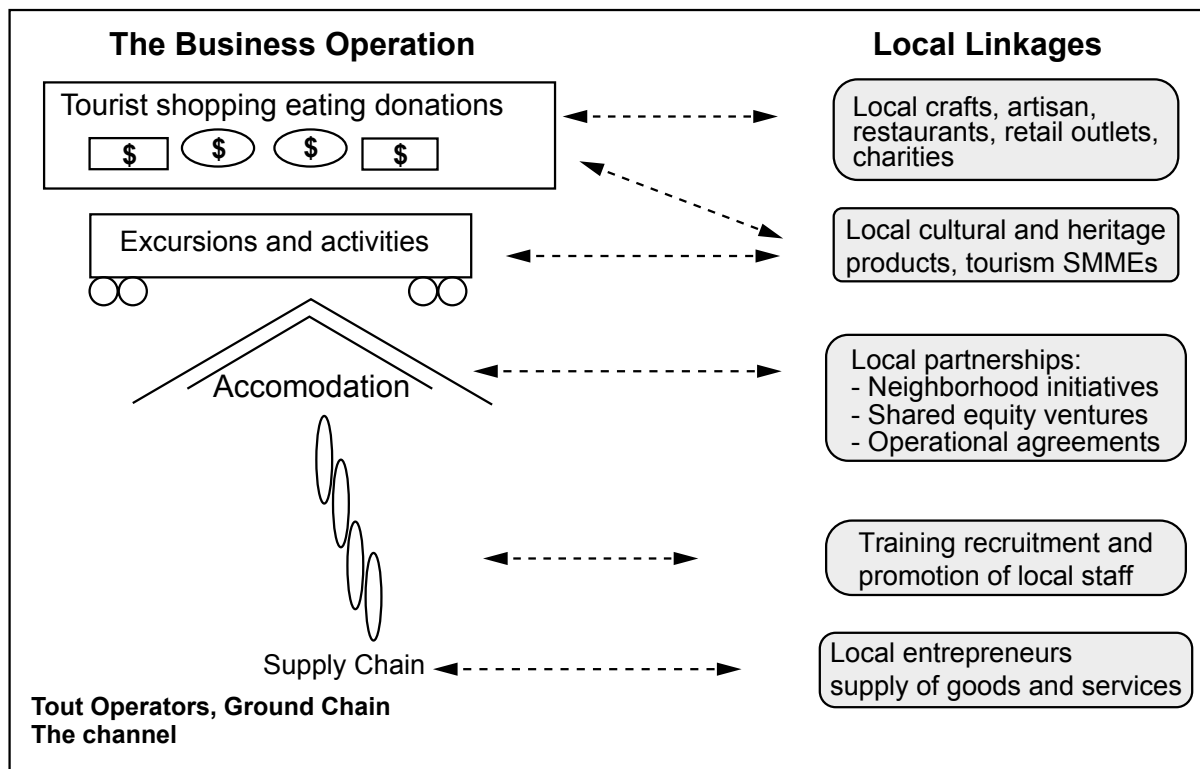
# APPENDICES

## APPENDIX 1: Outbound and Inbound Tourism)



Source: Christian, 2010.

## APPENDIX 2 : Tourism linkage into the host economy



Source: Mitchell and Fall (2006).

### APPENDIX 3: Developing Religious tourism

#### CASE STUDY

##### Religious Tourism in Jordan; the Baptism Site

The Baptism Site, also known as Bethany beyond Jordan or al-Maghtas. The site lies roughly 50 kilometers west of Amman, Jordan's capital city, and about 10 kilometers north of the Dead Sea's main resort region and tourist destination. The Baptism Site is remarkable in that it is often regarded as the birthplace of Christianity by many Christians. The Baptism Site attracts pilgrims from Jordan, Iraq, Syria, Lebanon, and Palestine every year. In 2010 approximately 5,000 Roman Catholic pilgrims and some 12,000 Eastern Orthodox prayed and performed the rituals of pilgrimage at the Baptism Site, according to the statistics of MoTA.

Pilgrimage to holy sites generates beneficial tourist traffic and, of course, economic benefit, particularly for the local populations that surround the sacred sites. The site has certain services, however they were insufficient to the site's state at the time of writing this report. On the site, there are eight tourist guides, all of whom interpret the site in English, with the exception of one bilingual guide who also speaks Russian. Due to a dearth of multilingual advisors, electronic audio interpretation in seven languages has recently been supplied to individual tourists.

According to Diaa al-Madani, director of the Baptism Site Commission (BSC), 65% of visitors to the site come from European countries, including Italy, Britain, Germany, and France, followed by North and South America with 20%. The number of tourists from East Asian countries are around 5%, while the percentage of Arab and Jordanian visitors may be at around 10% (Eturbonews, 2010). In October 2011, the commission of the Baptism Site and the Department of Antiquities in addition to the representative of Jordan in UNESCO started the preparatory steps to enlist the site on the World Heritage List.

Source: *Religious tourism in Jordan* <https://d-nb.info/1034352407/34>

### APPENDIX 4: Developing eco cultural tourism

#### CASE STUDY

##### Eco-cultural tourism development

The Amazon eco-cultural circuit, Peru

This is a Programme intended to improve competitiveness of the tourism sector on the eco-cultural route comprising Chachapoyas, Levanto, San Isidro del Maino and Magdalena (Universidad Nacional Toribio Rodríguez de Mendoza en Amazonas). This circuit offers 9 attractions and 7 activities, including trekking, horse riding, and rural community-based tourism, and ecotourism, archaeology, camping and cycling. All of this complies with sustainable fair and conservational tourism, which offers nature, culture, adventure and experiences. Tourists want to get involved, enjoy new experiences, feel connected and be a part of the conservation process of the places they visit. This experience forms part of their personal growth. This region, where the Incas once lived, has a vast biological and cultural diversity, magnificent waterfalls and valleys, private conservation areas, native species that are unique in the world and mysterious pre-Inca archaeological ruins. Among the tourist resources this area has, there are picturesque places such as natural viewpoints, Lopsol Forest, Purur River, and Pumauroco.

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