

Full Length Research Paper

An Assessment of the Potential for Improving Local Economic Linkages with Hotels in the Gambia in the Areas of Food, Beverage, Furniture and Soft Furnishing

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The aim of this research is to assess the potential for improving local economic linkages with hotels in the Gambia in the areas of food, beverage, furniture and soft furnishing and identify practical measures that can be taken to increase the income of local suppliers. The specific objectives are: to identify the products hoteliers are purchasing from local suppliers and what is being imported, to determine how much is being spent by hoteliers on local goods in The Gambia compared to the amount spent on imported goods, to establish why goods are being imported, to identify imported goods that could instead be sourced locally, to identify barriers from both hotels and local suppliers that need to be overcome, to make recommendations that would divert the money paid to importers by hotels to local suppliers, thus increasing income for local suppliers. A literature review focusing on existing academic works on tourism linkages and PPT was carried out in order to identify the factors argued to affect the local economic linkages with the accommodation sector in The Gambia. The information gathered from the review helped develop a conceptual framework which was used to come up with a research design. The research information was gathered from primary data in form of questionnaires and semi-structured interviews, combined with analysis of secondary data. The primary data was collected by questionnaire surveys designed for the hotels taking part in the study. The secondary data source included tourism publications in the Gambia as newsletters, technical reports, government policies, internet sites as well as literature accumulated through the Masters Course. Furthermore, a triangulation technique examining the information obtained from different sources was used to improve the verification and validity of the findings. The data collected was then analysed and evaluated in terms of the research objectives, conceptual framework, and any new emerging themes. Based on the key findings from the research, recommendations were made to improve the local economic linkages with the accommodation sector in the Gambian tourism industry.

Keywords: Assessment, Local Government linkages, Gambia, Food, Beverage, Furniture and Soft Furnishing.

INTRODUCTION

Background and Rationale

The Gambia is a poor developing country that has become a popular winter sun destination, particularly for UK tourists. Like many other developing countries tourism has developed in ways that provide few opportunities for locals and the informal sector to participate in a more responsible and profitable manner.

“Traditionally the formal sector provides the accommodation and transport in which tourists spend most of their time; leaving locals with part time and insignificant roles such as street vendors, beach boys seeking to befriend tourists as guides as well as staged cultural entertainers in hotels with low pay” (Bah, A and

Goodwin, H 2003).

Tourism in The Gambia has enormous potentials to create more jobs because of the need to meet the requirements of the visitors. "Tourism-generated employment is projected to increase from an estimated 16,000 jobs in 2004 to around 35,000 jobs in 2020" (Master Plan 2006, P.8). The Tourism Development Master Plan is designed to chart a way forward for tourism in The Gambia in the short, medium and longer-term. Amongst other things The Plan has recommended the increase of linkages with local suppliers with the view to spread to the tourism benefits.

This research study will look at economic activities such as the purchase of food, furniture and soft furnishing that can be linked to tourism and generate businesses that will positively impact on the livelihood of poor suppliers. Studies have revealed that agricultural linkages to the tourism industry in The Gambia has improved a great deal because in 2006, 50% of fresh fruits and vegetables were locally supplied compared to the 65% imported in 1986 (World Bank, 1986 quoted by Mitchell, J and Faal, J 2008, P.25)

A large amount of food and furniture is still being imported and ironically so many local suppliers are complaining that they do not have a market for their produce. An assumption for this research could be that hotels are not aware of the availability of these this produce and on the other hand, / or the local suppliers are cannot meet requirements of hoteliers. This is the central issue to this research study.

The purpose of the research is to identify barriers for more local sourcing from both hotels and local suppliers through the findings and use Pro Poor Tourism (PPT) as well as responsible tourism guidelines (Cape Town Declaration 2002) to make recommendations to increase linkages and enhance the livelihoods of poor Gambian suppliers. This study is timely as it is being undertaken when The Gambia has agreed to pilot the all inclusive (AI) package in selective hotels starting in the winter season 2010. Recommendations are provided in terms of maximising AI local linkages to hotels.

In assessing the potential for improving linkages in The Gambia, the researcher uses P PT approach to look at the contribution mainstream tourism and the hotels in particular can bring to poor Gambian suppliers. Since the formation of the Pro-Poor Tourism Partnership in 1999, it has been argued that the emphasis should shift from a limited focus on niche product development to the mainstream tourism industry as poverty should be at the centre of the agenda and this is where the most significant poverty reduction potential lies (Ashley, C and Goodwin, H 2007, p.1). The Partnership defines 'pro-poor tourism' as 'tourism that brings *net* benefits to the poor' (Pro-Poor Tourism Partnership, 2005, p.1).

Aims and Objectives

The aim of this research is to assess the potential for

improving local economic linkages with hotels in the Gambia in the areas of food, beverage, furniture and soft furnishing and identify practical measures that can be taken to increase the income of local suppliers. The specific objectives are:

- to identify the products hoteliers are purchasing from local suppliers and what is being imported
- to determine how much is being spent by hoteliers on local goods in The Gambia compared to the amount spent on imported goods
- to establish why goods are being imported
- to identify imported goods that could instead be sourced locally
- to identify barriers from both hotels and local suppliers that need to be overcome
- to make recommendations that would divert the money paid to importers by hotels to local suppliers, thus increasing income for local suppliers.

Abbreviations and Local Currency Exchange Rate

ASSET = Association of Small Scale Enterprises in Tourism

GTA = Gambia Tourism Authority

RTP = Responsible Tourism Partnership

PPT = Pro Poor Tourism

ICRT = International Centre for Responsible Tourism

GHA = Gambia Hotel Association

TTAG = Tourism and Travel Association of The Gambia

N/A = Not Available

GMD = Gambian Dalasi (currency)

1£ = 42 GMD

LITERATURE REVIEW

This literature review aims to put the research problem into a wider context through an overview of the local economic linkages with the hotel industry by focusing on existing academic works on PPT. The literature focuses on the specific research question which is to look at the potential for improving local economic linkages with hotels in The Gambia in line with PPT practice. This study argues that it is possible to demonstrate that the PPT debate can be taken to another level by developing a framework that shows the varied opportunities that exist for the local economy to contribute to PPT practice. The literature review focuses on the research and theory that might be relevant to the research problem.

Pro Poor Tourism

(Mitchell and Faal March 2008) Pro-poor tourism recognizes that different types of tourism have a different pattern of benefit flows to the poor with a specific focus on strengthening linkages with the local economy and local people within it. "The concept of PPT has emerged

since it was first introduced in a report for the UK Department for International Development in 1999 (Deloitte and Touche, 1999), and key tourism organisations and donor agencies such as United Nations World Tourism Organisation (UNWTO) – Sustainable Tourism Eliminating Poverty (STEP), Dutch Development Agency (SNV) and the Asian Development Bank have consequently adopted it. The PPT approach assumes that tourism can aid in poverty reduction by increasing the net benefits that ensue to the ‘poor’ from tourism development” (Ashley *et al.*, 2001 quoted by Meyer 2007 p.558).

Pro-poor tourism is based on the pro-poor growth (PPG) assumption that economic growth is beneficial for development and should be encouraged as long as the ‘poor’ benefit over-proportionally (Ravallion, 2004). Much of the PPG debate is centred on macro-economic reasoning and assessment, while PPT work, on the other hand, has focused largely on the micro level and in particular on the impacts of operating practices of mainstream businesses on poverty reduction (Ashley and Haysom, 2004).

If PPT is advocated as tourism that generates net benefits to the poor and seeks to ensure that tourism growth contributes to poverty reduction, PPG is on the other hand advocated as tourism that gives to the poor disproportionately more than the non poor. This debate has been going on for some time but the PPT seems to be the concept that can work in developing countries like the Gambia. The researcher is using PPT in this study mainly looking at net benefits.

Tourism is seen by many as an industry that can create opportunities for the poor in developing countries. However, the industry has frequently been criticised for not fully realising its potential to create linkages with the local economy. As a consequence much of the work on PPT since 1999 was concerned with rather descriptive analysis and the design strategies that are not always implemented. Butcher (2005) is more critical, arguing that while PPT sees itself as a broader approach than community-based tourism as it prioritises the links between communities and the formal sector; its attempts are likely to be equally limited in their vision. He calls the PPT vision ‘[w]orthy, perhaps, but hardly an inspiring vision of what might be possible’ (Butcher, 2005: 122).

Relatively little emphasis has been given to linking the ideas of PPT to an array of existing work on tourism and development (Meyers 2007, p.559). There is a need to bring together the PPT ideas with the existing work on tourism and development with the view to have a more general framework that highlights the varied opportunities that exist for local suppliers in the Gambia to contribute to PPT practice.

The study is also meant to contribute to the existing pro poor literature by specifically looking at an area that is highly recommended for further research by other publications such as Improving Access for the Informal Sector to Tourism in The Gambia.(Bah and Goodwin

2003); The Gambian Tourist Value Chain and Prospects for Pro-Poor Tourism (Mitchell and Faal March 2008); Pro-Poor Tourism: From Leakages to Linkages; A Conceptual Framework for Creating Linkages between the Accommodation Sector and ‘Poor’ Neighbouring Communities, (Meyers 2007).

It will be difficult for developing countries to translate PPT strategies into action if the internal leakages are not addressed.

Leakages

There are different definitions of leakages but the researcher will be using the following: “Leakage is a term used to describe the percentage of the price of the holiday paid by the tourists that leaves a destination (in terms of imports or expatriate profits) or never reaches the destination in the first place due to the involvement of ‘Northern’ based intermediaries” (Meyer 2007).

According to the World Bank over 60% of the world exports goes to Africa every year. This practice is bound to have both negative and positive impacts on African tourism industries particularly small countries like The Gambia and some Caribbean countries who currently find it hard to meet the demand of the tourism industry due to a number of reasons. A number of studies warn about the high dependence of the tourism industry on imports and thus the danger of unnecessarily high leakages. Despite efforts being put in place by governments in terms of policies and other initiatives by the private sector to address leakages in the tourism industry, developing countries are still relying on imported goods to meet the high demand in the industry. As Meyer (2007, p.561) puts it “leakages tend to be highest when the local destination economy is weak and lacks the quantity and quality of inputs required by the tourism industry and thus appear to be particularly high in small developing countries and island economies, for many of which tourism is the principal export earner”.

Leakages in the tourism sector generally fall into three categories: internal, external and invisible leakages. The category the researcher focuses on is the internal leakages which are estimated to be between 40-50% in most developing countries (Diaz Benevides 2001). They tend to be the highest when the local destination economy is weak in respect to the lack of or inferior quality of domestically produced goods and services.

Leakages are particularly high in small developing country island economies, for many of which tourism is the principal export earner – examples are: St. Lucia 45% (Spinrad 1982:85, quoted by Meyers 2006, p.7), average for the Caribbean region is reported to be around 70% (Pattullo 1996 quoted by Meyers 2006, p.7) while a tourism official of the Bahamas states that in 1994 leakages for that country might have been as high as 90%. These studies indicate the importance of local ownership and linkages with the various local economic sectors.

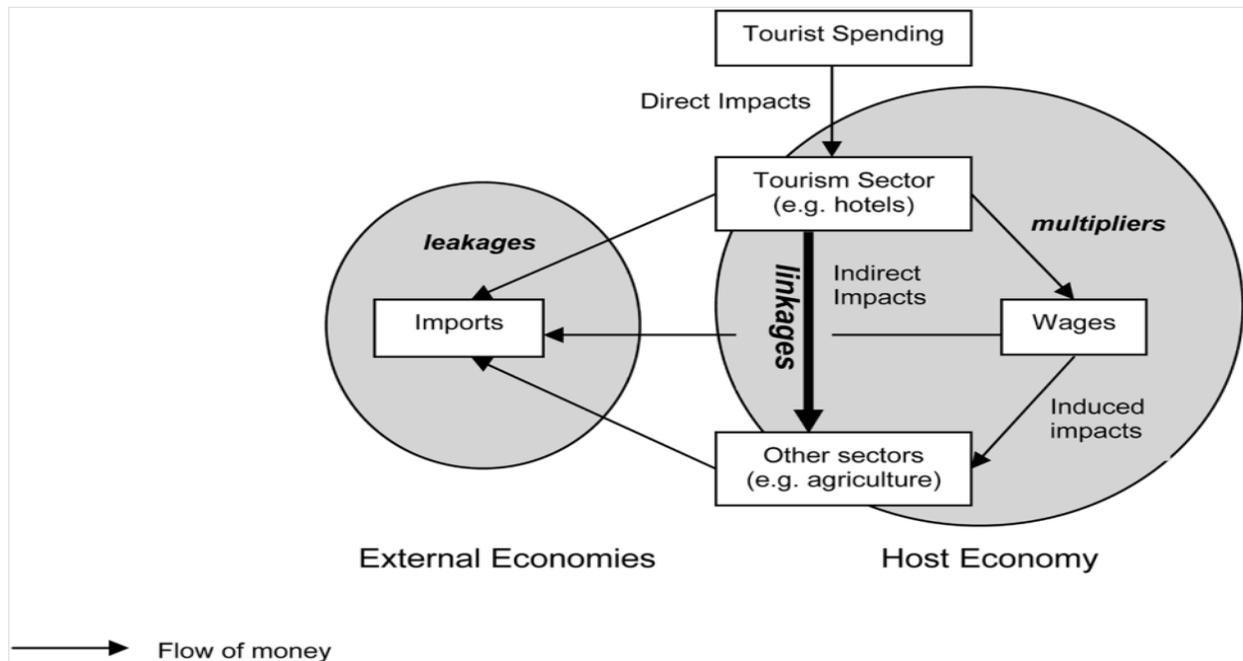


Figure 1: Linkages, multipliers and leakages Source: Meyer 2007

Attempts have been made to reduce expenditure leakage from their tourism sector by developing stronger links between tourism and other sectors in the local economy. Government policy in Jamaica, for example, has concentrated on strengthening the economic links between tourism and agriculture, thereby reducing the need for the tourism sector to import food. The Organisation of American States assessed Jamaica's leakage at 37% in 1994, a far more respectable figure than is usual in the region (Pattullo 1996, p. 38-9). The link between leakages and multipliers and the potential opportunities that linkages between the tourism industry and the local economy can provide are shown in Figure 1.

Sourcing

A review of the literature on sourcing demonstrated the failure of inter-sectoral linkages to develop. Weak linkages between the tourism and agricultural sector in developing countries like the Gambia and small countries of the Caribbean could lead to high imports. The lack of cohesion between the tourism industry and traditional economic sectors, in particular agriculture can lead to tourism not fulfilling contributing to the socio economic development in destinations. Rather than creating synergies between different sectors, tourism could generate increased food imports, which damages both local agriculture and drains foreign exchange earnings. Mbaiwa (2000) states that tourism has minimal economic impact on rural development in the Okavango

Delta in Botswana mainly because it has weak linkages to the domestic economy, that is tourism only contributes 0.5% to agricultural purchases locally.

On a more positive note a number of studies investigating linkages with suppliers have focused on the agricultural sector, which is seen as promising particularly good opportunities for linkages and the sourcing of food and beverages. Recent studies have estimated that approximately 30% of tourist expenditure is on foodstuff. The sourcing of goods locally, particularly from the agricultural sector, is seen as a key potential impact the tourism sector can have on the economies of destination countries. In fact, many national tourism development plans are drawn up based on the assumption that the economic benefits of tourism will stimulate other sectors of the economy, especially agriculture. To increase procurement of locally available inputs and to maintain sustainable linkages between tourism and other sectors of the economy needs to be harnessed. This will require taking into account demand for the inputs, supply, marketing, intermediary related factors and government policy frameworks.. A frequent problem in increasing inter-sectoral linkages is often the mismatch between supply and demand and the lack of intermediary support structures that enable buyers and suppliers to come together. A key issue is the lack of communication between sectors and consequently the lack of awareness of needs and objectives that make it often impossible to cooperate. Frequently highlighted problems are inadequate quality, reliability and volume of produce, exacerbated by poor transport, storage and communication facilities (Meyers 2007, p.569).

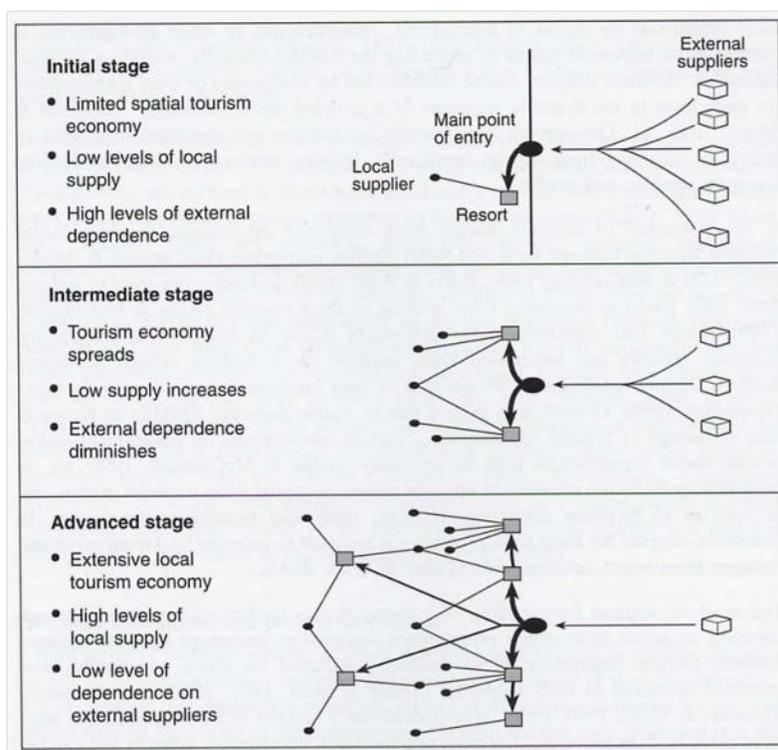


Figure 2: Import substitution with local suppliers

Source: Kirsten and Rogerson (2002)

A good example of cooperation between the tourism and the agricultural sector is the *Eat Jamaican* campaign launched in 2003 by several Jamaican associations and businesses, including the Jamaica Agricultural Society (JAS) and the Jamaica Manufacturers' Association (JMA), to promote locally-produced goods to residents, visitors and exporters. Since its launch the JAS reported growth of the agricultural sector, which is strongly linked to the support provided by one of the leading all-inclusive tourism resort: *SuperClubs*. In addition to buying fresh fruits and vegetables from JAS, and promoting the *Eat Jamaican* campaign in their resorts, *SuperClubs* is said to be working with JAS to provide incentives for local farmers and assists with designing technical assistance programmes for JAS members (Meyers 2007, p.569).

Linkages

Strengthening linkages between the tourism sector and local economy has the greatest direct impact on poverty reduction (Mitchell and Faal March 08). It also spreads the benefits of tourism further, throughout the economy and is not just retained within the sector. Linkages are often difficult to establish to start and maintain, however, long-term benefits are more sustainable, once a scheme is up and running.

The focus of this study is on sourcing and procurement linkages and the most direct impact on the poorest in developing countries is through strengthening linkages between agriculture and tourism, as often about 30% of tourist expenditure is accounted for by food and beverages (Meyer 2006). This study will look beyond food and beverage linkages with the hospitality industry in the country but it will be assessing the potential for improving these linkages. Increasing linkages between the tourism and other sectors of the local economy is the focal point of this study. The term "linkages" for most studies is synonymous with investigation of the proportion of imported food to domestic food utilised by the tourism industry (Pattullo, 1996) (see figure 2). The aim of creating linkages is to reduce the high import content in the tourism sector, which is achieved by substituting foreign imports with local suppliers (Meyer 2007). Figure illustrates how (theoretically at least) an import dependent economy can through import substitution create links to the local economy.

Multipliers aim to summarise the capacity of tourism in generating economic development by examining the impacts of additional tourist spending in a destination area, which in turn serves to generate income, employment, and a range of other benefits for the host economy (Pearce, 1989 quoted by Meyers 2007, p.562). When examining tourism multipliers they often display

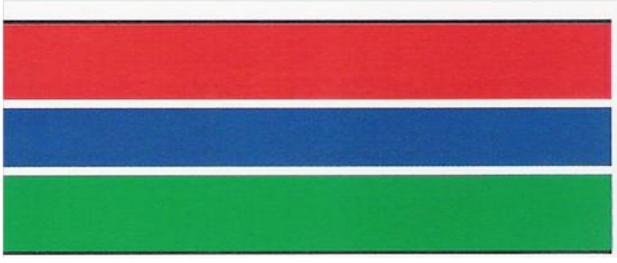
	
<p>Location: West Africa, between latitude 13:45 W and 16:50 W Capital: Banjul Area: 11,300 Sq km (4361 Sq miles) Time Zone: Greenwich Mean Time (GMT)</p>	<p>Official Language: English Population: 1.5 million people Males: 50.1% Females: 49.9% Annual Growth Rate: 2.8% Population Density: 128 per Sq km</p>
<p>Local Languages/Ethnic Groups: Mandinka, Wolof, Fula, Jola, Sarahule, Serere , Majago , Creole Religion: Muslim 90%, Christian 9%, Others 1%</p>	<p>The Government:</p> <ul style="list-style-type: none"> • Multi-party Democratic Republic Since Independence (1965) • An Executive Presidency • Independent Legislative and Judicial System <p>President and National Assembly Members are Elected Every Five Years</p>
<p>The Economy (2004) Currency: Dalasi GNI Per Capita: US\$ 280 GDP: US\$ 415.1 million GDP Growth Rate: 8.3%</p>	<p>Main Economic Sectors Services: 53.7% of GDP (Trade, Tourism, Transport and Communications, Government and Business Services) Agriculture: 32% of GDP, but employs 75% of the workforce Industry: 14.3% (Manufacturing, Construction, Mining, Utilities)</p>

Figure 3: Brief country profile of The Gambia

Source: Gambia Investment Promotion and Free Zones Agency (GIPFZA) 2008

very substantial international variations depending on, for example, the structure and size of the economy in which the tourism activity takes place or the spending patterns of visitors and how the receipts from tourism are spent by front line tourism businesses.

Country Profile

The Gambia (figure 3) is one of the smallest countries in West Africa with a total land area of 11,300 square kilometres (km). It stretches 350 km inland from the West to East on either side of The Gambia River. The River Gambia, which runs the entire length of the country from the Futa Jallon Highlands in the Republic of Guinea to the Atlantic Ocean, divides the country into two halves the North and the South Banks. The River is one of the longest in the world allowing direct navigation inland from the open ocean.

The Gambian climate is typically Sahelian with a long dry season from November to May and a short rainy season between June and October. Distribution of rainfall tends to be irregular and the country has experienced recurrent droughts. The estuary basin of The River Gambia is virtually a tidal inlet with salt-water intrusion ranging from 180-250 km. in the rainy season and dry seasons respectively. Irrigable lands are therefore limited and agriculture, which is the backbone of the Gambian economy, is mostly rain-fed. As a result agricultural activity is subject to wide seasonal fluctuations and production levels are vulnerable to variations in rainfall.

Brief Socio-Economic Overview

The Gambia is a small, poor, young and heavily indebted West African country. The 2008 United Nation

JANUARY - NOVEMBER 2008

NATIONALITY	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEP	OCT	NOV	DEC	TOTAL
British	6,384	13,154	8,812	5,787	1,298	884	1,061	1,173	1,012	1,679	7,741	7,801	56,786
Swedish	1,084	1,774	1,132	218	52	108	59	38	71	451	1,077	1,782	7,846
Danish	712	844	644	211	33	30	19	15	25	324	629	660	4,146
Finnish	813	1,103	851	319	11	23	14	12	9	607	703	794	5,259
Norwegian	979	1,225	982	31	32	46	58	15	26	34	265	1,057	4,750
French	69	108	78	58	36	70	85	66	26	39	62	181	878
German	839	1,053	913	284	178	116	106	117	131	273	367	409	4,786
Amarican	126	162	145	57	110	112	80	86	113	74	95	183	1,343
Italian	122	294	135	47	22	18	11	21	10	19	39	121	859
Belgian	265	665	460	161	138	117	207	119	123	233	265	337	3,090
Austrian	53	107	57	10	15	21	19	8	9	16	21	47	383
Swiss	86	95	41	29	13	9	19	14	15	35	41	79	476
Canadian	62	96	50	19	21	20	12	21	2	19	29	31	382
Dutch	2,649	4,530	1,927	952	493	449	862	781	692	1,259	1,316	1,618	17,528
Spanish	406	621	355	479	335	358	458	724	405	456	443	493	5,533
Czechs Rep.	21	15	9	5	4	—	1	2	1	6	12	29	105
Polish	27	34	38	20	4	1	7	7	7	8	15	26	194
Africans	225	355	245	155	160	135	169	151	179	157	212	267	2,410
Others	293	458	260	242	187	117	116	164	161	188	276	268	2,730
Gambian	1,663	2,033	1,310	997	808	817	890	1,006	1,210	985	1,490	1,730	14,939
Greek	-	2		1	3	—	—	1	—	—	—	4	11
Taiwanese	4	4	10	5	1	4	5	2	4	12	7	15	73
Irish	131	165	103	77	19	25	17	23	16	36	108	105	825
Icelander	3	9	10	1	-	—	2	1	—	—	2	4	32
Estonian	3	20	30	4	1			1	1	6	7	7	80
TOTAL	17,019	28,926	185,697	10,169	3,974	3,480	4,277	4,568	4,248	6,916	15,222	18,056	135,452

Figure 4: Tourist Arrivals by Nationality and Month
source: Gambia Tourism Authority

Human Development Index for The Gambia is 0.471, which gives the country a rank of 160th out of 179 countries. Salaries and wages in most sectors are very low, and the minimum wage is only about one U.S. dollar a day. However, signs of abject poverty are rare in urban areas, although there is large-scale underemployment, especially among younger persons.

Tourism is identified as a significant sector in the Gambia's Poverty Reduction Strategy Research (PRSP) particularly as a source of foreign exchange earnings; inward investment in tourism was identified as a potential significant contributor to employment in the recent PRSP (World Bank 2002).

The Second Strategy for Poverty Alleviation (SPAI), otherwise known as the Poverty Reduction Strategy Research (PRSP), published by the Department of State for Finance and Economic Affairs (April 2002) concluded that although poverty is on the rise in the urban areas it's more significant in rural areas; for instance 61 percent of the rural population are living below the overall poverty line (USD 1 per day) in 1998 as opposed to 41 percent in 1992.

Agriculture is the main economic activity and this sector accounts for the largest proportion of economically active persons with more than half of the population engaged in subsistence farming, livestock rearing and groundnut cultivation. Groundnut is the main cash crop but efforts to diversify have brought in sesame into the country, which is predominantly grown by women.

TOURISM IN THE GAMBIA

The founding of tourism in The Gambia is attributed to a Swedish tour operator (Mr. Bertil Harding) who 'discovered' the beautiful sandy beaches and pleasant climate in this unspoiled tropical destination. It is a good sun-sea-sand destination less than seven hours flying time from Scandinavia. With a fortnightly charter flight from Sweden, he started the business in 1965. For several years, the Scandinavians were the only tourists in The Gambia, then the British came and tourism grew rapidly.

A Tourism Office and a Tourism Liaison Board were set up in 1970 by The Gambia government to provide control and coordination mechanisms. The Tourism Development Area (TDA) was also established in 1970 with the view to solely promote the development of tourism related project. In 1974, The Ministry of Tourism was launched with the aim of providing a policy formulation, planning and administrative framework to give a well-ordered direction to tourism development. However, it was not until the mid 1990s that many tangible results of the Ministry of Tourism could be seen, for example a greater share in ownership, commercial facilities, and destination marketing (Ministry of Tourism and Culture, June 1995, p10).

In 2002, the current Gambia Tourism Authority (GTA) was established with a parliamentary mandate (the GTA act 2001) to promote the country as tourist destination and develop its tourism industry.

Tourist Arrival

Tourist arrivals at Banjul International Airport are mostly from Northern Europe with the British arrivals making up half the total (see figure 4 above). For many years and till today tourism in The Gambia has shown solid potential for growth. Numbers of visitor into the country grew steadily in the 1980s and early 1990s but The British travel advice in 1994/5 following the coup d'état had heavily hit the tourism arrivals in The Gambia. However, international arrivals in The Gambia appear to be on an upward trajectory. Air charter arrivals have increased from about 57,000 in 2001 to 120,000 in 2006 (see figure 5 below).

Tourism Contribution to Foreign Exchange Earnings

The tourism industry is the major foreign exchange earner in The Gambia, According to the 2006 Tourism Development Master Plan, net foreign exchange earnings are projected to increase from an estimated \$40 million in 2004 to \$130 million in 2020.

Tourism Contribution to Employment

Tourism-generated employment is projected to increase from an estimated 16,000 jobs in 2004 to around 35,000 jobs in 2020. The employment figures are for full-time jobs, or full-time job equivalents in the case of persons (e.g. tour guides, souvenir vendors) who may derive only part of their income from tourism. The total number of persons either fully or partly dependent on tourism as a source of livelihood is therefore greater than the employment figures alone would suggest (Master Plan 2006).

Tourism Contribution to Government Revenues

Assuming an average contribution from all tourism enterprises of 20 percent of gross revenues, the *potential* revenue yield from tourism enterprises could increase from a notional figure of D200 million in 2004 (compared with an actual tax collection of D54 million) to around D800 million in 2020 (Master Plan 2006).

The Accommodation Sector

The accommodation sector consists of hotels ranging from one to five stars located mainly in the TDA. There are also a number of apartments and camps up country which play an important role in the tourism industry. By and large, the country has a total of 7,000 beds and 3,000 rooms (EMG Deloitte, 2005).

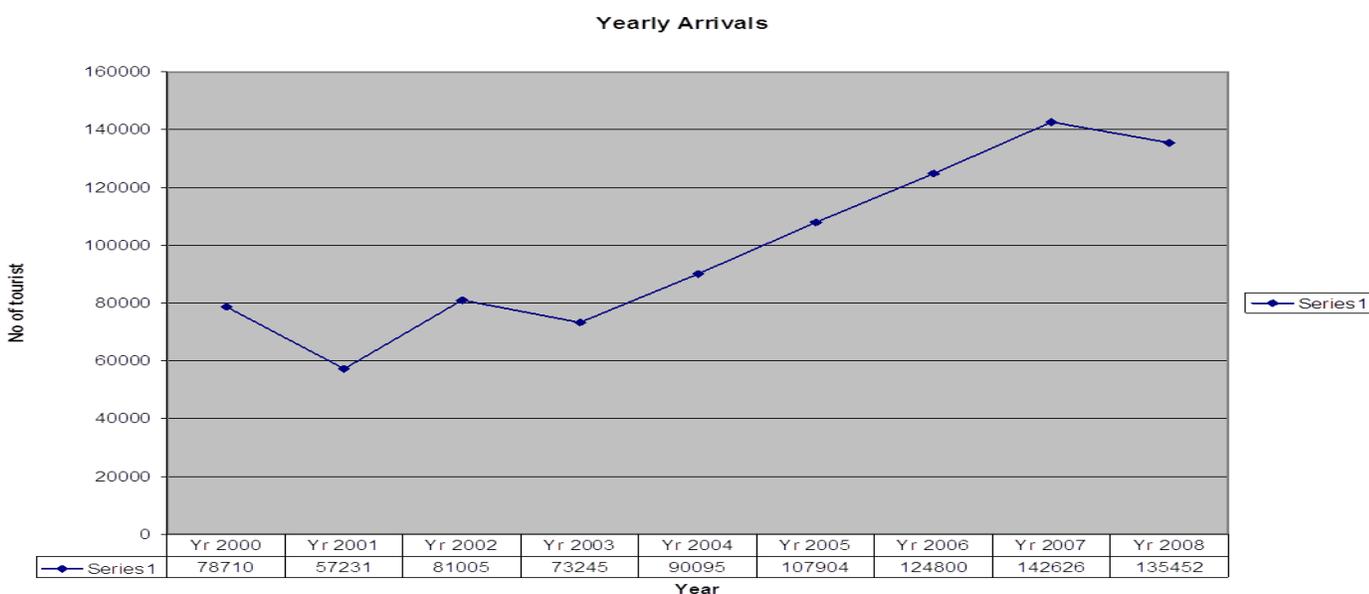


Figure 5: Early air arrivals (source: Gambia Tourism Authority)

Table 1: Main tourist hotels

Name	Number Beds	Number Rooms	Quality ¹	Year built	Location	Ownership
African Village	142	73	2 'star'	1971	Bakau	Irish
Badala Park	404	200	2 'star' ²		Kololi	Gambian
BaKotu	180	88	3 'star'	1978	Kololi	Swedish
Bungalow Beach	224	114	3½ 'star'	1973	Kololi	Gambian
Cape Point	121	62	2 'star'		Bakau	Gambian
Corinthia Atlantic	408	204	4 'star'	1980	Banjul	Libyan
Fajara Hotel	560	240	2½ 'star' ²	1972	Fajara	Gambian
Holiday Beach Club	148	80	2½ 'star' ²	1993	Kololi	Gambian
The Kairaba	302	156	5 'star'	1990	Kololi	Kuwaiti
Kombo Beach	516	258	3½ 'star'	1983	Kololi	British
Mansea Beach Hotel	120	60	2 'star' ²	1996	Kololi	Nigerian/ Gambian
Ocean Bay	390	195	4 'star'	2004	Bakau	Government
Palm Beach	240	120	2½ 'star'		Kololi	Gambian
Palma Rima	304	152	2½ 'star'		Kololi	Gambian
Paradise Beach	174	73	3 'star'	2003	Kololi	Libyan
Sarge's	196	98	2½ 'star'	1995	Kololi	Gambian
Senegambia Beach	650	340	3½ 'star'	1982	Kololi	Italian/ Gambian- Lebanese
Sunbeach	584	192	4 'star'	1971	Bakau	Mauritian
Sunset Beach	226	97	3 'star'		Kololi	Gambian- Lebanese
Sheraton		195	5 'star'	2006	Brufut	Kuwaiti

Source: Gambia Tourism Authority and Gambia Master Plan (2006)

The hotel stock (table 1) is of variable, and quite modest, quality. At present, there is no national classification system, so the tour operators run their own quality

assessment. There is, therefore, no guarantee that the quality standards for Gambian hotels would match those in other destinations. Part of the reason for this is the

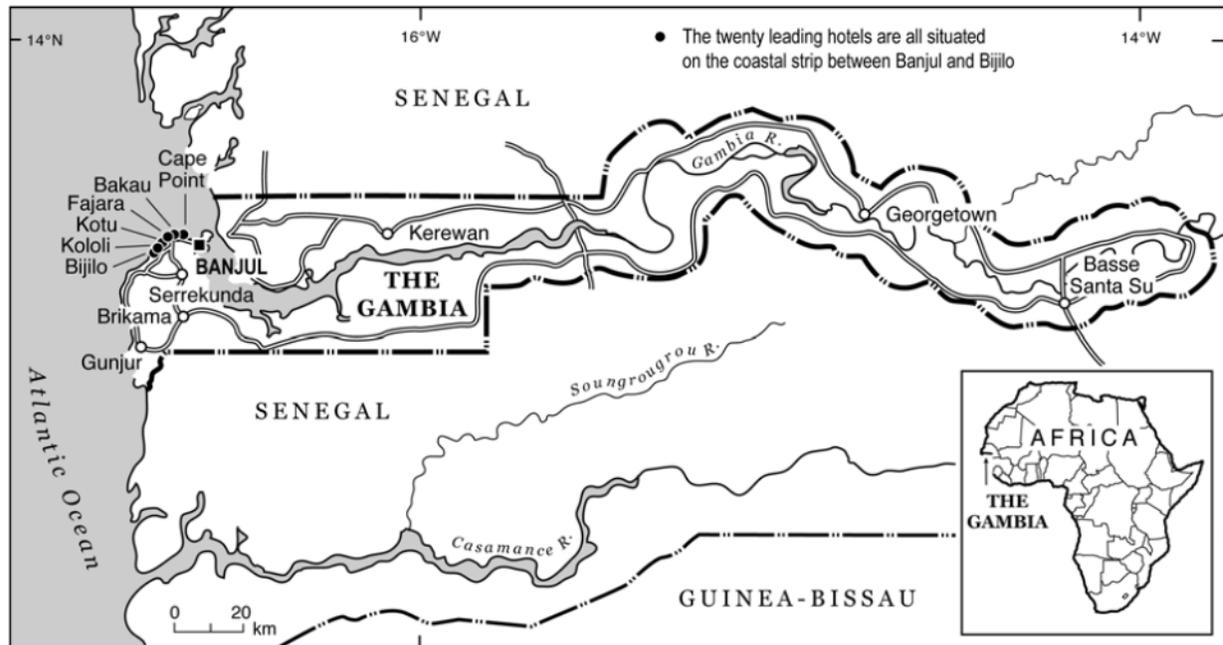


Figure 6: The Gambia: Location and main tourist hotels

Source: Mitchell and Faal (2007) © Development Southern Africa

relatively old age of most of the hotel stock. Several of the larger hotels were some of the first tourist hotels built in The Gambia in the 1960-70s, Mitchell and Faal 2008(Figure 6).

Marketing of the Gambia's Tourism Potentials

The marketing of The Gambia's tourism potentials is properly epitomised in the GTA 2008 visitors and investors guide brochures which stipulates specifically that the Gambia has a:

- Relatively close proximity to most European countries
- Peace and political stability
- Friendly and hospitable people
- Pleasant sub-tropical climate as well as abundant sunshine and sandy beaches
- Abundant exotic bird-life
- Rich and diverse culture and heritage
- Eco-tourism potential

Furthermore, using the 2006 Tourism Master Plan recommendations, The GTA has added an emphasis on marketing the River Gambia, cultural tourism, an extended green summer season, and sustainable and eco-tourism initiatives. This new focus is highlighted in the 2008 visitors guide by the Honourable Minister of Tourism Ms. Nancy Njie who said " ...for the first time visitor seeking exotic holiday to the seasoned traveller looking for out of the way thrills alike, The Gambia is your destination. With more than 500 species of birds as well as a wide very variety of fish the country is now the

must visit destination for bird watchers and fishing enthusiasts. In addition, the cultural beauty of the country's tourism is promoted through the Roots Festival which takes place every two years. The occasion celebrates the epic story of Kunta Kinteh, one of the African slave whose roots were traced back to The Gambia by one of his descendants, Alex Hailey, in his acclaimed book and film *Roots* (GTA, 2008, p4).

Tourism Policies

Most recently The Gambia adopted two tourism policies with the view to broaden the tourism market, enhance product quality, address infrastructure needs as well as formulating strategies looking at the economic, social and environmental triple bottom line that will make The destination a better place to live in and a better place to visit. The two policies are namely the Responsible Tourism and the Tourism Development Master Plan Policies adopted in 2004 and 2006 respectively. The Tourism Development Master Plan which takes 2025 as the period for the long- term vision for tourism development proposes to:

- Broaden the tourism market in new source markets as well as increase business from niche markets such as eco and cultural tourism
- Enhance the quality of the current tourism products in the areas of accommodation, excursions, heritage and a more responsible community involvement
- Address key infrastructure needs mainly sufficient and

more affordable electricity and water supplies, improved health services in rural areas

In addition to the Tourism Development Master Plan, a Responsible Tourism Policy for The Gambia was launched by the Minister of Tourism and Culture at the 2004 World Travel Market in London. This Responsible Tourism Policy (RTP, 2004) which was developed by the Responsible Tourism Partnership, a body that represents all tourism stakeholders in the Gambia, aims to combat some of the negative aspects of tourism, including environmental damages and the lack of benefits to local people. The members of RTP are the Ministry of Tourism and Culture, The Gambia Tourism Authority, the Tourism and Travel Association of The Gambia (TTAG), Overseas Tour Operators and The Association of Small Scale Enterprises in Tourism (ASSET). Of particular relevance to this research, this policy document recognises among other things that “it is important that local communities are involved in and benefits from tourism which has potential to enrich the country as a destination and that this will increase both national and local community earnings from tourism” (RTP, 2004, p3). The Responsible Tourism Policy which has already immensely contributed to the responsible development of tourism in The Gambia aims to:

- Minimise negative economic, environmental, and social impacts;
- Generate greater economic benefits for local people and enhances the well-being of host communities, improves working conditions and access to the industry;
- Involve local people in decisions that affect their lives and life chances;
- Make positive contributions to the conservation of natural and cultural heritage, to the maintenance of the world's diversity;
- Provide more enjoyable experiences for tourists through more meaningful connections with local people, and a greater understanding of the cultural, social and environmental issues;
- Provide access for physically challenged people; and
- Is culturally sensitive, engenders respect between tourists and hosts, and builds local pride and confidence

Local Economic Linkages

Tourism as a multifaceted socio-economic activity has a variety of linkages to other sectors such as agriculture, furniture and soft furnishing. It was however difficult to establish the level of linkages with the local economy in The Gambia as there was hardly any literature found.

In 2001, an Action Aid study revealed that the income realised by the food and beverage sector in The Gambia via tourist out-of-pocket expenses was D 163 million. More recently a rough estimate in The 2006 Tourism Master Plan Technical Report No.9 on agricultural linkages stated that the demand for food and drinks in the tourism industry is about D342 million (\$12.2 million).

However, this does not necessarily mean that all the food and drinks consumed by tourists is sourced locally. Despite the positive picture the 2006 Master Plan is trying to portray with the assumption that leakages of gross visitor expenditure due to imports and payments retained outside The Gambia are to decrease from 45 percent in 2001 to 35 percent in 2020), the challenge of creating more linkages with the local economy is still high.

Efforts are being made by Government and Non Government Organisation to try and improve local economic linkages with the accommodation sector in the area of agriculture and horticulture in particular. In 1986, it was estimated that 65 percent of hotel foodstuffs were imported and by 2006 it is estimated that 45 percent to 50 percent of all fresh fruit and vegetables were locally supplied (World Bank, 1986 quoted by Mitchell and Faal 2008).

An interview with the vice Chairman of The Gambia Hotel Association in the researcher's preliminary findings confirmed that no previous study was done on the linkages with the tourism industry and the furniture and soft furnishing sectors. So getting data on furniture and soft furnishing linkages would help assess the business potential in this area.

Whilst most of the literature found on tourism linkages in The Gambia is based on estimates, the researcher will in this study use quantitative and qualitative methods with the view to give a clearer indication of the realities between the accommodation sector and the local economy.

Although enhancing agricultural and furniture linkages to the tourism sector may have the largest potential impact on poor people, it is difficult to implement and often requires a far-sighted private sector partner to initiate the programme. Successful initiatives are those that mediate effectively between farmers and the hotels – by way of market facilitation. A good example in The Gambia is the ‘Gambia is Good’ project which has in 2007 delivered £ 34,000 of sales away from the importers and into the hands of the local, small scale producers. GIG has demonstrated that it is possible for 1000 local growers, 90% of them women, to produce 20 tones of vegetables and fruit in the tourism season to supply hotels and make areal contribution to reducing poverty in the Gambia. There are however different issues with strengthening the linkages between tourism and agriculture and furniture. These are supply-related, demand-related, marketing/intermediary factors the researcher will look at in the next section.

CONCEPTUAL FRAMEWORK

“A conceptual framework explains, either graphically or in a narrative form, the main things to be studied – the key factors, constructs or variables – and the presumed relationship among them. Frameworks can be

Table 2: Factors that influence local economic linkages with the hotel industry in The Gambia (adapted from Meyer 2007)

Products	Demand related factors	Supply related factors	Marketing intermediary and Factors	Government policies
Food	The type of Visitor accommodation With respect to ownership, size and class The promotion of local cuisine Health and safety concerns Seasonality National abattoir not meeting international standards(beef)	The quantity and quality of local production High prices of locally produced food Technological and processing limitations High cost of feed	Marketing and infrastructure constraints Supply poorly adjusted to demand Spatial patterns of supply (egg) Middle-men Distribution Infrastructure EU subsidies	Lack of credit and micro Finance support Limited training and education Lack of infrastructure development
Local Beverage	The type of Visitor accommodation With respect to ownership, size and class The promotion of local beverage	Technological and processing limitations	Supply poorly adjusted to demand	Lack of credit and micro Finance support Limited training and education
Furniture And Soft Furnishing	The type of Visitor accommodation With respect to ownership, size and class	The quantity and quality of local furniture High prices of locally produced furniture Technological and processing limitations Late delivery	Supply poorly adjusted to demand	Lack of credit and micro Finance support Limited training and education

rudimentary or elaborate, theory-driven or commonsensical, descriptive or casual.”(Miles and Huberman, 1994, p18).

So in order to help clarify the concepts involved in this study the conceptual framework in table 2 was developed by the researcher at the start of the field work based on the findings of the preliminary literature review and individual reflection.

Factors affecting the improvement of local economic linkages with the hotels will be discussed later in detail by the researcher.

RESEARCH DESIGN METHODS

One of the critical problems that confront any social

research is the choice of an appropriate research approach and methods to investigate the specific problems. The reason for this lies in the nature of social phenomena, which have to do with extremely varying human conditions in different environments. These varying conditions have given rise to the fundamental long-standing debate on whether to use a quantitative or qualitative approach in social investigation. Quantitative approaches with open and closed questions were used by the researcher in this study. A quantitative methodology characterised by a deductive reasoning grounded in a positivist paradigm was used by the researcher to carry out a descriptive, explanatory and applied research with the accommodation providers. This was carried out in order to present in numeric forms

the assessment of the potential for improving the local economic linkage with hotels in the Gambia in the areas of food, beverage, furniture and soft furnishing. The focus of the research is on mainstream accommodation providers in The Gambia as they are at the forefront of the tourism industry. The accommodation sector in the destinations has supposedly strong responsibilities towards members of the local communities who are employees and suppliers.

A random and probability sampling strategy was used with 101 study units consisting of fruit, vegetable, fish, meat, beverages, furniture and soft furnishing in 30 hotels in The Gambia. All units were each given an equal and independent chance of being selected. However, only a sample of 33 study units was selected from the population to take part in this research. The selection was done based on the study units that have more potential to improve local economic linkages. Out of 30, nine hotels consisting of both small scale and big accommodation providers took part in the study because they were likely to have the required information and be willing to share it.

Semi-structured interviews were arranged for hotel purchasing managers, local suppliers as well as other government and non government agencies with the view to get additional information that would add value to the findings.

The research information was gathered from primary data in form of questionnaires and semi-structured interviews, combined with analysis of secondary data. The primary data was collected by questionnaires surveys designed for the hotels taking part in the study. The secondary data source included tourism publications in the Gambia as newsletters, technical reports, government policies, internet sites as well as literature accumulated through the Masters Course.

Furthermore, a triangulation technique examining the information obtained from different sources was used to improve the verification and validity of the findings. For example, findings from questionnaire surveys with the hotels were compared to the results from the semi-structured interviews with local suppliers as well as government and non-government officials to check for consistency. However, the researcher fully understands that the aggregation of data will not necessarily produce consistency.

The information gathered was in depth and of high quality but it is good to note that these are not large samples and there are other hotels and local suppliers in the Gambia who did not take part in the study due to their unavailability and thus there is room for bias. It may be small but this was the most representative sample that could be obtained within the existing resource and timeline.

During the 6 months field research in the Gambia from October 2008 to March 2009, the researcher used a variety of quantitative methods that are as follows:

Documentary Analysis

A review of the literature was carried out to put the present research problem into context. The review included tourism reports and publications on the topic done in other parts of the world as well as in the Gambia. The factors identified by the literature that might affect linkages with the accommodation sector and the local economy were used as a basis to develop the conceptual framework as well as helped the researcher in the design of interviews, and survey of the different stages of the study.

Questionnaires

A self administered questionnaire consisting of 35 questions covering mainly five areas namely furniture (A1- A6), soft furnishing (B1- B6), arts and craft sales (C1- C3), fruit and vegetable (D1-D13), fish, prawns, beef, chicken and egg (E1-E5) beverage (F1-F5) and repairs and maintenance labour (G) was sent to the nine hotels taking part in the study (see Fig 11). Each question sought to find out three things: the amount of money spent on locally grown/ made as well as imported goods, whether the hotels see any advantage in more local sourcing and the barriers needing to be overcome to encourage more linkages between the hotel industry and the local economy. The amount of money made through the hotel shops on arts and crafts as well as the sales made by craft markets during free market days in hotels are also covered in the questionnaire. Both open and closed ended questions were asked and according to the hotel management the questionnaires were completed by the finance department in consultation with the purchasing managers. A draft questionnaire was piloted with three accommodation providers, members of ASSET (Association of Small Scale Enterprises in Tourism), before sending research sample unit. This practice was to make sure that the questionnaire had an area of focus and that the series of questions would obtain information on the key concepts within the research.

Face-to-face Semi-Structured interviews

A face-to-face semi structured interviews were carried out with 15 informants from both local suppliers and hotels as well as technicians from the Department of State for agriculture and non government agencies with the view to cross examine and add value to the information gathered from the other sources. Open-ended questions related to informant's specific area of operation were asked and interviews were limited to 45 to 60 minutes. With the permission of the interviewee almost all conversations were tape recorded and few notes were taken in order to ask follow up questions.

ETHICAL CONSIDERATIONS

The researcher did not have any problems with the methodology used to conduct the study. For the face-to-face interview and the questionnaire, all participants were provided with information on the purpose of the research and participated on the basis of informed consent. The interest of all the participants who took part in the research has been safeguarded.

RESULTS

Key research findings will be summarised and described in this section with the identification emerging of trends and issues. The information collected during the fieldwork consists of recordings and notes from the structured interviews and questionnaire results of both quantitative and qualitative data. Due to the fact that the two sample sizes for this research are small, the results can only give a general idea of the realities on the ground rather than showing the true picture.

FINDINGS FROM THE RESEARCH QUESTIONNAIRE SURVEY IN HOTELS, LOCAL SUPPLIERS AND KEY INFORMANT STRUCTURED INTERVIEWS

Findings from Hotel Survey

The quantitative data provided by hotels has been put in tables to facilitate in the identification of trends and comparisons of findings whilst the qualitative textual information provided have been classified into emerging themes in relation to the study topic and the conceptual framework. The findings described below covers furniture, soft furnishing, food and beverage.

Furniture

According to the literature review, leakages were considered as an important aspect of local economies not fully getting benefit from products used for entertaining the visitors in a destination country. With the exception of Kombo and Sunset Beach Hotels, getting data from the big hotel on furniture was not possible simply because the records were not available. The reason given is that the records are kept in the offices of their overseas partners or independent consultants who supply all the imported furniture. Since the furniture was bought together with other equipment that was often not itemised, the hotels were just not prepared to spend the time necessary working out the amount of money spent on furniture. As indicated in table 4, a lot of money is spent on imported furniture despite the efforts of some hotels who are buying locally made ones. The sample also showed that Sunset Beach Hotel is the only big hotel which is buying the totality of its furniture locally while Kombo Beach combines imported and locally

made ones (see table 3 below). Please note that any hotel with more than 80 rooms is considered as a big hotel in this study. The researcher was also able to establish that hotels change their furniture every eight to ten years. When asked whether they saw advantages in more local sourcing, all the hotels said yes despite the huge amount of money being spent on imported furniture. The barriers needing to be overcome will be discussed later in the factors affecting the improvement of the local economic linkages with the hotel industry.

Soft Furniture

Findings illustrated in table 4 shows that most hoteliers are getting their supply of soft furniture from local fashion designers but the potential is not fully utilised because the amount spent on imported items such as bed linen and curtains remains significant. The researcher was also able to establish that hotels change soft furnishing every three years. Table 4 also showed that out of the nine hotels surveyed seven were able to give us information on the amount they spent on repairs and maintenance labour. Among the seven hotels in the sample only three are still employing imported labour. This was corroborated by the Vice Chair of the Gambia Hotel Association. The situation has improved a lot compared to 15 years when almost all maintenance managers in all major hotels were expatriates. All the hotels that took part in the study acknowledge the advantages in more local sourcing of soft furnishing but sometimes they have no alternative but to buy imported goods because of the enormous barriers. The need to overcome these barriers will be discussed later.

Fruit

The Gambia is endowed with huge horticultural potentials. Most fruits needed in the hotel industry, except pineapple and apple can be grown locally. However, hotels stated that they would still have to import to satisfy their needs. For example table 5 below showed that an amount worth 25% of hotel needs was spent on imported water melon and another amount worth 70% was also spent on imported honey melon. Mango, bananas, and oranges are all sufficiently available locally but the findings also showed that more locally grown oranges could have been used by hotels if they were seedless. The pine apple consumed is 100% imported. The barriers needing to be overcome will be discussed later in the factors affecting the improvement of the local economic linkages with the hotel industry.

Vegetable

Table 6 below showed that with the exception of potatoes, all other vegetables consumed by the hotels are sourced locally but a considerable amount of money is still spent on importation of items like potatoes and

Table 3. Amount spent annually in GMD on furniture

Hotels	Beds		Tables		Chairs		Wardrobe	
	local	import	local	Import	Local	import	Local	import
Safari Garden	25,000		30,000		21,000		Built in	
Golden Beach	25,000	100,000	50,000	50,000	50,000	100,000		100,000
Bangalow Beach	N/A		N/A		N/A		N/A	
Kombo Beach		320,000	960,000		480,000			16,000,000
Sunset Beach	727,500		337,400		345,000		577,500	
Corinthia Atlantic	N/A		N/A		N/A		N/A	
Ocean Bay	N/A		N/A		N/A		N/A	
Kairaba Beach	N/A		N/A		N/A		N/A	
Senegambia Beach								

Source: research field work

Table 4: Amount spent annually in GMD on soft furnishing

Hotels	Cushion Covers		Bed Linen		Table Linen		Curtains		Uniforms		Repairs and Maintenance Labour	
	local	import	local	Import	Local	import	Local	import	Local	import	Local	Expats
Safari Garden	20000		20000		15000		14000		40000		116438	
Golden Beach	20000		10000	4000	4000		30000	20000	7000		500000	
Bangalow Beach	N/A		N/A		N/A		N/A		N/A		N/A	
Kombo Beach	96,000		480,000			160,000		384,000	250,000		1,980,000	480,000
Sunset Beach	300,000		200,000	50,000 (blankets only)	40,000		100,000		53,229		360,000	
Corinthia Atlantic		108,000		168,000	72,000		88,800		100,252	22,275	531,511	34,422
Ocean Bay				915,318	45,000				150,000		2,000,000	840,000
Kairaba Beach												
Senegambia Beach												

Source: research field work

Table 5: Amount spent annually in GMD on fruits

Hotels	Water melon		Honey melon		Mango		Banana		Orange		Pine apple	
	<i>local</i>	<i>import</i>										
Safari Garden	7,200	2,400			9,016		14,400					30,000
Golden Beach	6,300	2,100	2,160	5,040	2,4000		4,000		3,000			
Bangalow Beach	5,700	1,900	1,440	4,800	N/A		3,600		N/A			3,840
Kombo Beach	32,400	10,800	29,400	68,600	22,080		16,974		4,500			60,000
Sunset Beach	40,500	13,500	28,350	66,150	12,000		67,500	7,200	N/A			94,500
Corinthia Atlantic	23,425.5	7,808.5	13,434	53,736	2,730		30,870		6,462			66,120
Ocean Bay	109,500	36,500	61,620	143,780	51,150		51,330	86,350	31,800	41,580		282,840
Kairaba Beach	95,250	31,750	57,000	133,000	47,000		48,000		59,000			243,000
Senegambia Beach	92,250	30,750	19,100	191,000	36,000		124,000		7,760			110,000

Source: research field work

Table 6: Amount spent annually in GMD on vegetable

Hotels	Carrot		Potato		Onion		Lettuce		Tomato		Cucumber		Cabbage	
	<i>local</i>	<i>import</i>												
Safari Garden	3,405	1,460	4,800	14,400	11,000	25,700	4,320		14,400		8,350	1,500	6,100	2,600
Golden Beach			7,200	16,800	6,000	14,500	2,000		14,600		5,400	1,100	8,400	3,600
Bangalow Beach	4,535	10,580	8,280	19,320	7,560	17,640	21,600		28,800		30,240	3,360	9,250	3,950
Kombo Beach	18,050	42,110		155,500	19,800	46,200	10,500		220,000		17,865	1,985	15,400	6,600
Sunset Beach	59,400	138,600	17,850	53,540	16,800	39,200	27,000		33,600		67,500	2,250	21,,350	9,150
Corinthia Atlantic	33,975	79,275	28,400	85,200	30,000	67,870	25,730		29,300		61,000	6,670	16,525	7,125
Ocean Bay	69,960	163,240	31,425	73,325	26,500	61,900	32,250		32,800		28,530	3,170	47,670	21,000
Kairaba Beach	27,600	64,400			62,400	145,600	104,000				66,600	7,400	40,600	17,400
Senegambia Beach	45,000	105,000	62,500	187,500	31,200	72,800	33,000		214,000	11,300	51,300	5,700	45,000	15,000

Source: research field work

Table 7: Amount spent annually in GMD on food (meat, fish etc...)

Hotels	Fish		Prawns		Beef		Chicken		Egg	
	local	import	local	Import	local	import	local	import	local	Import
Safari Garden	96,000		43,200		64,800			43,200	28,800	11,520
Golden Beach	250,000		30,000			250,000		150,000	25,000	
Bungalow Beach	127,200		78,480		244,800			57,600	114,720	35,000
Kombo Beach	764,025		259,200		468,000	1,344,357		183,150	189,525	81,225
Sunset Beach	81,600		96,900		62,400 (local staff)	211,200		115,830	310,500	243,000
Corinthia Atlantic	176,222	4,639	562,775		64,509	43,006		124,000		118,454
Ocean Bay	588,990		722,500		264,590	421,500		1,966,464	92,575	39,675
Kairaba Beach	400,000		341,000			1,202,000		662,000	668,000	150,000
Senegambia Beach	221,000		121,000			491,000		791,000	400,000	100,000

Source: research field work

carrots. For example the amount spent on imported carrots represents 70% of the hotel needs while the amount spent on imported potato is 100% of the needs. The amount spent by hotels on the other vegetables can be presented in terms of percentages as follows: onion 30% locally grown and 70% imported; lettuce and tomato 100% locally grown, cucumber 90% locally grown and only 10% imported; cabbage 70% locally grown and 30% imported. According to the hotels, the locally grown vegetables are fresher and they taste better. All the hotels sampled for this research averred that there huge advantages in more local sourcing of the vegetable but there limited by some challenges which will be discussed below.

Meat and Fish

A huge amount of money is being spent on beef and chicken as it is clearly showed in table 7. The good news however, is that the amount spent on fish and prawns stays with the local economy as they are all available locally. The findings below showed that efforts are being made by local farmers to supply eggs to the hotels but the amount spent on imported eggs is still high. There are obvious advantages in more local sourcing some of these (meat and chicken) locally. However, there are enormous obstacles. These obstacles will be the main area of discussion in this research in the sections below.

Beverage

The beverage is an area that a very small amount of money is spent on imported drinks and this is clearly shown in table 8. This is an indication that the local economic linkage with hotels as far as beverage consumed is good. All the soft drinks, the mineral waters and over 90% of the beers consumed by the hotels are produced by local drink factories. However, the findings

also revealed that local juices like wonjo and baobab are not as popular as the conventional drinks such as coke, Fanta etc. Therefore a little amount of money is spent on them. The researcher also learnt that the wonjo and baobab juices were only offered to tourists on arrival as a welcome drink. All the hotels in the sample saw advantages in locally sourcing of drinks like wonjo and baobab but some impeded by some barriers. The need to overcome these barriers will be discussed later in section 1.3; factors affecting the improvement of the local economic linkages with the hotel industry.

Arts and Craft for Resale through Hotel Shop

Getting information on the amount of money made in the hotel arts and craft shops was impossible despite all the reassurances given by the researcher on the purpose of the study. However, the researcher was able to gather that with the exception of Golden Beach Hotel, all the other hotels in the sample have arts and craft shops that are owned by private individuals. Out of nine hotels, four shops are owned by different Gambians whilst the other 4 shops are owned by a German business woman who has been living in the Gambia for more than 25 years. The Gambian owned shops are all run by the owners themselves or a member of the family whilst the ones owned by the German business woman employs nine Gambians throughout the year (five at Senegambia, two at the Kombo Beach, one at Bungalow Beach and one at Sunset Beach).

When the researcher visited the hotel shops to carry out the interview, he realised that the locally owned arts and craft shops are diversifying; stocking more products such as chocolates, biscuits, mineral water, even non-alcoholic drinks and cigarettes. Intriguingly the German businesswoman shops remained 100% arts and craft products. The locally owned arts and craft shops are

Table 8: Amount spent annually in GMD on beverages

Hotels	Beer		Soft drinks		Local wonjo juice		Local baobab juice		Mineral water	
	local	import	local	Import	local	import	local	import	local	Import
Safari Garden	97,082		154,582		4,320		2,880		50,400	
Golden Beach	100,000		75,000		3,000		3,000		60,000	
Bangalow Beach	764,160		52,120		1,200		1,200		86,000	
Kombo Beach	579,257		84,922		960		N/A		115,200	
Sunset Beach	225,600	54,000	171,000		70,200		12,960		54,000	
Corinthia Atlantic	306,178		406,686		7,910		N/A		134,000	
Ocean Bay	376,348	74,294	281,376		38,860		11,550		75,762	
Kairaba Beach	919,000		549,000		27,000		7,000		402,000	
Senegambia Beach	800,000		620,000		12,000		N/A		700,000	

Source: research field work

Table 9: Information on free market days in hotels

Hotels	Free markets Days	Craft Markets	Daily Sales	Commission or fee to Hotel	Fee to craft market committee
Safari garden					
Golden Beach					
Kombo Beach	Two/weekly	Kotu (BB)	D 200		D 10
Sunset Beach	One/weekly	Kotu (BB)	D 500		D 10
Corinthia Atlantic	Every day/weekly	Banjul	D 150	D 20	
Ocean Bay	One/weekly	Cape point	D 250		
Kairaba					
Senegambia	Two/weekly	Senegambia	D 200	20% of sales	

gradually becoming mini markets.

When asked why the arts and craft products on display only represent 20% of their stock, all Gambian shop owners said that business was not good and in order to pay the rent the management had to allow them to sell drinks and other items, a practice that was never accepted by hotels as this was seen to be in direct competition with hotel bars and restaurants. On the other hand when the researcher asked the German business woman whose shops seems to be doing well with 100% arts and craft what was business like, she replied that business was okay but not as good as 10 years ago.

All arts and craft shop owners affirmed that there are advantages in sourcing their products locally as this will create better linkages with local artists. The Gambian owned shops source 70% of their products locally and the 30% imported artefacts are brought to them by middlemen from Senegal and Mali. The German businesswoman however, sources 25% of her stock locally (the 15% is made by her own tailors), 10% from Asia and 65% from the West African Sub-region. When asked why she was selling Asian art in Africa, she replied that it was smaller African art works made in Asia with a better finish and they are increasingly getting popular with her customers so she is likely to increase the Asian stock. The business woman further stated that

65% of her products come from the sub-region because local artists lack the creativity and innovation she is looking for.

Arts and Craft Free Market Days

The free market day is an open day where craft markets are invited to go to the hotels and sell their goods to tourists who would probably not have the chance to visit craft markets during their holiday. Arts and craft vendors who participate in free market days at the sample hotels are mainly from Kotu, Senegambia, Cape Point and Banjul Arts and craft markets. Vendors from each of these arts and craft markets are given a day and a specified number of vendors are allowed to attend.

The craft markets in the table 9 have free market days in other hotels but the researcher focused on the sample hotels in this study for consistency. It is important to mention that Safari Garden and Kairaba who don't offer free market days have arts and craft vendors permanently stationed in their hotels. Golden Beach is however the only hotel in the sample that neither has a free market day no arts and craft vendors in its premises. Please see table 9 for more information on free market days in hotels.

FACTORS HOTELIERS THINK ARE AFFECTING THE IMPROVEMENT OF LOCAL ECONOMIC LINKAGES

i. Demand Related Factors

Health and Safety Concerns

Seven out of the nine hotels surveyed said that the procurement of beef from local producers remains a challenge due to health and sanitation concerns. The fact that the national abattoir in Abuko does not meet international health and safety standards is not encouraging for hotels to buy the local beef. However, products such as fruits, vegetables and seafood have the potential to make it to the hotels.

Seasonality

Seasonality is another barrier identified by the hotels with regards to the local supply of certain vegetables such as onions which is only available from April to June, leaving the hoteliers with no choice but to import in order to meet demand.

ii. Supply Related Factors

Quality and Quantity of Local Products

The quality and quantity of locally produced food is often mentioned as the key limitation for inter-sectoral linkages with the tourism industry. Eight out of the nine hotels surveyed think that the quality of local products such as beef is very poor. The beef is very tough compared to the imported one and it is no doubt it is the most imported product by the hotels (see table 8 above). Considering the fact that from one cow one can only get an average 7 kilos of antricode and 1.5 kilos of fillet, the Gambia is very unlikely to meet the demand in beef because according to reliable sources only 25% of the cattle used come from The Gambia and the other 75% is sourced from the sub – region. Similarly all the hotels in the sample use imported potato and pine apple simply because they are not grown by Gambian farmers.

iii. Marketing and Intermediary Factors

Spatial Patterns of Supply and Unreliability

All the hotels in the sample stated local producers' spatial patterns of supply and unreliability as another factor affecting the improvement of the local economic linkages with them. For certain products like onion for example; they can only be grown by local farmers from April to June. That seasonality combine with the lack of adequate storage capacity mean that hotels would have no option but to import to meet their needs.

Supply Poorly Adjusted to Demand

All the hotels in the sample agreed that the local producers are still lacking behind when it comes to adjusting to their demand. Despite all the efforts made by the GIG project in introducing new good agricultural practices, the hotels are still importing vegetables and other food items like beef and chicken because the quality produced by the local farmers is either not good enough or not available at all locally. The fact that totality of the chicken consumed in the sample hotels as well as the beef is a good testimony of that.

Similarly, as far as furniture is concern major hotels like Kairaba, Senegambia, Bangalow Beach, Ocean bay and Corinthia Atlantic had to import their furniture because the quality and quantity needed was not available locally.

When asked why the arts and craft shops managed by the German businesswoman seems to be doing better than the ones managed by locals, the hotel managers' opinion was that innovation and good business practices like having a good display with price tags on each item on sale are the factors behind the successful shops.

Similarly hoteliers think that the quality of the craft markets products is still sub-standard and the fact that vendors don't have price tags on the items, thus affecting customer confidence.

HOTELS PROPOSED ACTION TO IMPROVE LINKAGES WITH THE LOCAL ECONOMY

Seven out of nine hotels in the sample would like to see Government set up a professional skills institute where future furniture makers can be trained and be well prepared to become entrepreneurs.

All the hotels would like to see more private investors involved in horticulture the GIG way as they see that as the only way the issues related to seasonality, poor quality and insufficiency of products can be addressed.

Eight out of the nine hotels in the sample agreed that the national abattoir in Abuko which is privately owned should be upgraded to international standards with the adequate processing and storage facilities in order to improve the quality of the local beef.

All the hotels in the sample said that arts and craft shop owners as well as craft markets must be constantly innovative and should find a way of encouraging their suppliers to produce quality arts works that tourists will find more attractive. Hotels would like to see the Federation of craft markets impose a price tagging system on all items being sold in hotels as this will increase sales for vendors and immensely improve consumer confidence.

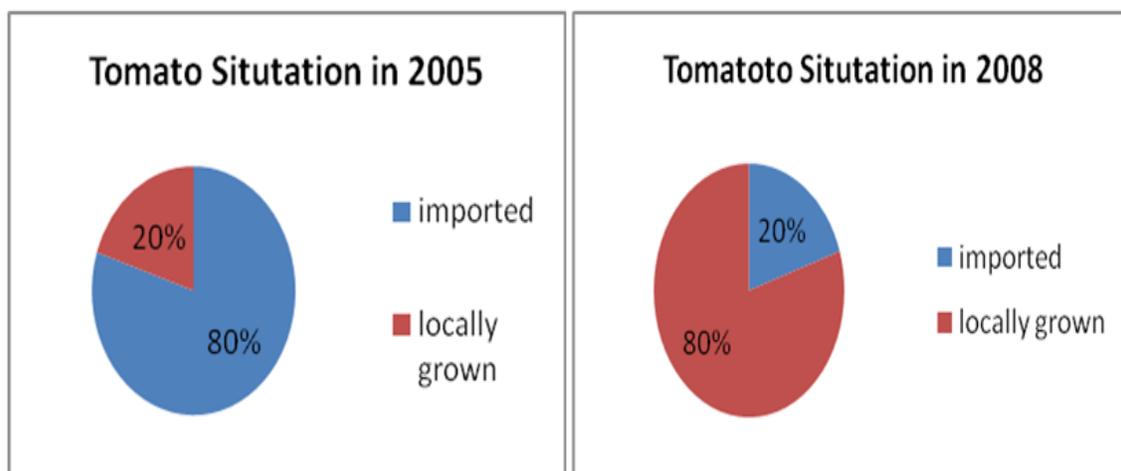


Figure 7. The improvements registered with tomatoes

Source: Gambia is Good Project under Concern Universal

FINDINGS FROM LOCAL SUPPLIERS

The findings showed that since 2005 there has been a gradual positive shift towards vegetables grown locally compared to the imported ones. This phenomenon can be linked to the establishment of GIG in 2004 who started introducing good agricultural practices with Gambian farmers in the North Bank and Western Regions. A good example of good practice is the introduction of the hybrid tomato which has now addressed the poor quality of tomatoes that used to be grown locally. Thanks to the GIG intervention, quality locally grown tomatoes are now available all year round. Figure 7 shows the improvement in tomato.

Products such as local fresh eggs are increasingly available in the market. However, a significant amount is still being spent on importation (see table 4). Local poultry farmers are finding it impossible to compete on price with the imported eggs from Europe that are heavily subsidised by their governments. The high cost of the imported chicken feed remains a challenge for local farmers and all these are barriers that need to be overcome in order to develop the local poultry industry.

The hotels' needs for fish and prawns can be met locally despite some few complaints from the Fishermen related to the sales and marketing of their products. The economic linkage with the beverage produced locally is good but the amount of money the hotels continue to spend on imported furniture, soft furnishing, beef and chicken is a real cause for concern (see tables 3, 4 and 7).

As far as furniture is concerned, there are only two companies by namely N.G Enterprise and Afri Wood Timber and Furniture that are currently working with the hotels and this information is confirmed by the Gambia Hotel Association. All two suppliers claim to have the

capacity to meet the furniture needs of the sample hotels in this research even though most of the wood needed would be imported. According to the proprietor and General Manager of N.G Enterprise, some hotels would rather buy cheaper imported furniture that would last four to five years rather than going for locally made reliable furniture that cost 30% more but lasts 15 to 20 years. The furniture makers interviewed by the researcher don't receive any incentive from the Government in a form of duty waiver for their imported machinery or the imported wood needed to produce quality furniture.

However, for the meat and chicken, the research found out that Rue Chicken Limited, a Gambian company, a modern poultry farm with processing and packaging facilities, will supply substantial proportion of chicken meat required by the hotels in country, when it starts in June 2009. With only a capacity of four thousand chicken broilers, Rue Chicken may not totally meet the demand for chicken in the hotel industry but they would be taking a significant step towards enhancing local economic linkages with the tourism industry. Rue Chicken Company wants to specialise in providing chicks to smaller poultry farmers as well as producing chicken broilers. With over one year of existence, Rue Chicken Limited is already having some positive impacts on poultry farming in the Gambia because the chicks that local farmers used to import for D40 are now available locally for D 25. Rue Chicken Limited is able to offer chicks at lower price thanks to incentives they receive from The Gambia Government who exempts their agricultural inputs such as machinery, fertilised eggs and chicken feed from sales tax and import duties. This information was confirmed by the Gambia Investment and Free Zones Agency which is the Gambia Government Agency responsible for issuing special incentive certificates on sales taxes and imported

duties to businesses with capital investments of over \$ 100,000.

Despite the incentives given by Government, local suppliers interviewed by the researcher are still faced with challenges that will be discussed below in the factors affecting the improvement of local economic linkages with the hotels.

FACTORS LOCAL SUPPLIERS THINK ARE AFFECTING THE IMPROVEMENT OF LOCAL ECONOMIC LINKAGES

1. Demand Related Factors

The type of visitor accommodation with respect to size

Local suppliers of furniture and soft furnishing found it very hard to meet the demand of big hotels. The suppliers interviewed in this study said that big hotels don't give them enough time to finish their big orders and therefore they find it much easier to work with smaller hotels.

Seasonality

Despite all efforts being made by GIG, fruits and vegetable growers in The Gambia are still faced with problems of seasonality. As it is clearly illustrated in table 6 a certain degree of import is still required in order to meet demand. A good example is onion as the locally grown ones are only available from April to June or July. Similarly fruits like mango are only available for three months (June – September). Only hotels with good preservation facilities will be able to buy more and use them later when they need them.

2. Supply Related Factors

Technology and Processing Initiations

The producers interviewed in this study complaint about expensive machinery and a lack of appropriate working area. With the exception of N.G Enterprises and Afri Wood Timer and Furniture, the majority of furniture makers have their workshops in residential areas which makes it very hard for them to expand and develop into a full fletch industry. Another important factor mentioned by the Manager of N.G Enterprise was the fact that most local furniture makers don't know that the wood should be left to dry for at least three months before they can use it as this often results in bad finishes or unwanted changes in shapes after a while. The poor storage of wood without proper ventilation also affects the quality of the furniture made locally according to N.G Enterprise.

Similarly the lack of appropriate technology and processing initiations are seen as a major barrier by poultry farmers who are finding it hard to graduate from supplying fresh eggs to supplying chicken to hotels and the local market. Rue Chicken Limited, the only modern poultry farm in the country, is currently waiting for expatriates technicians with the required knowledge to arrive in May 2009 in order to start producing broiler chicken for local consumption despite having all the machinery in place.

Quality and Quantity of Local Products

As the Manager of N.G Enterprise puts it “the quality of products such as furniture will remain a challenge in The Gambia because skilled work like furniture making has for a long time been seen as a profession that is left to illiterate people who cannot read or write and this situation will lead to workers taking wrong measurements as well as finding it very hard to operate the modern machines we are using”. All these factors affect the quality of furniture.

Similarly the local beef in particular is not finding its way to hotel kitchen because of the poor quality. An interview with a private company specialized in the processing and supplying of beef to hotels and supermarket revealed that the beef available locally is very tough compared to the imported one and this is related to the poor slaughtering techniques the cattle is subjected to at the national abattoir combined with poor storage facilities. The other problem beef suppliers are faced with is meeting hotel demand. Our findings revealed that over 70% of the beef needed consumed in the Gambia is from cattle imported from the sub region (Mali and Senegal). So clearly the current cattle stock in The Gambia cannot meet the demand of the hotel industry.

High Production Cost

Small-scale producers cannot rely on economies of scale and also tend to have higher production costs. This results inevitably in higher prices. For example the import of the raw material and agricultural inputs like wood, machinery or chicken feed needed to produce quality products is affecting the production cost. Poultry farmers interviewed in this study expressed concerns over the high cost of feed that is imported from Senegal. This situation makes the production of local eggs expensive and very much dependent on the availability of chicken feed from a different country. According to the poultry farmers, the spatial patterns of supply of local eggs and their high price can be attributed to the fact that the feeds are not available locally. Poultry farmers have to almost import all their agricultural inputs. The high cost of the electricity needed for good preservation and storage of food is something that all local suppliers

complaint about. As one local producer puts it “this high cost which is inevitably going to be added to the selling price make some local products unattractive to hotels compared to imported goods”.

3. Marketing and Intermediary Factors

Marketing constraints

When asked about the barriers that needed to be overcome to improve linkages with hotels, the furniture makers interviewed in this study agreed that the frequently limited communication between the hotels and the furniture sector means that there is generally limited awareness of what is required by the tourism industry and what can be produced locally to satisfy the demands of the accommodation sector. As it is illustrated in table 3, very few hotels are buying locally made furniture. However, the situation is not the same with local food items as most of them are having some access to the hotel market either formally through GIG with horticulture products or informally through middle men and other private businesses with seafood, meat and beverages (see tables 6, 7 and 8).

Middlemen

Before the establishment of GIG in 2004 the majority of the local goods required by the hotel industry were supplied by middlemen who were not necessarily paying farmers a good value for their products despite the high price they were getting from hotels. For example in The Gambia all the local beef supplied in hotels and restaurants are sold to suppliers by middlemen who have a monopoly of the market. According to meat suppliers the middlemen go to farmers in rural areas, offer them cash for their cattle and sell them at the local abattoir with high profit margins which will make it very difficult for meat processing private companies like Kombo Meat to compete with the imported beef in terms of pricing. However, when the researcher visited the fishing villages of Brufut and Tanjeh, the fishermen admitted that they cannot alienate the middlemen who always buy their highly perishable products. According to the purchasing Managers in the sample hotels, all the seafood and beef are supplied by middlemen. When asked whether the middlemen had anything to do with the high price of local products, the purchasing managers in the sample hotels unanimously agreed that they are happy with the price they are paying for the seafood but they were also quick to mention that the price of the local beef is too expensive compared to the imported one which is a better quality.

EU subsidies

The European Union subsidy to European farmers who supply the hotels in The Gambia with all the chicken and

almost all the beef required is an issue that is seriously affecting local economic linkages. When asked about the barriers needing to be overcome to improve local economic linkages, the first point raised by the poultry farmers was the EU subsidies that are really affecting competitiveness in terms of pricing for the supply of eggs. As one farmer puts it “if tourists from Holland don’t stop coming to The Gambia with their own eggs, we will find it very hard to sustain our businesses”. The farmer was referring to the subsidized eggs imported from Holland that are used by hotels.

The second point raised by the poultry farmers was the high cost of the imported feed for their chicken layers. They stated that in 2007 so many small poultry farmers had to close down business because they could not sustain the high cost of the feed.

When asked whether they would start producing chicken in addition to the fresh eggs, the poultry farmers interviewed in this study said that they would love to start it but don’t quite know how to compete with the imported chickens that are heavily subsidised.

Late Payment of Bills by Hotels

The late payment of bills is seen by all suppliers as a big barrier that needs to be overcome in order to improve local economic linkages. The one month credit period agreed by the hotels is hardly ever respected. With the exception of GIG, all the other suppliers in the sample said that they sometimes have to wait for three to four months with some hotels before they get paid.

High Rent

The high rent paid to hotels is seen as a real barrier by arts and craft shop owners as it puts a lot of pressure on them.

4. Government Support

Lack of Credit and Micro Finance Support

All the local suppliers interviewed see the lack of a micro finance facility with a low interest rate for local businesses as a real barrier. The high interest rate of 30% local banks charge on loans to businesses has caused so many damages. As a fashion designer who took a loan from a local commercial bank puts it “I feel like I am working for the bank because all the money I make in this business goes towards servicing my loan”.

Lack of Infrastructure Development

The lack of enough infrastructure development was seen as a barrier for fishermen and vegetable growers who need good storage facilities; cold stores and ventilated warehouses to preserve their perishable goods. Efforts are made by Government to build cold stores in the

fishing villages of Tanji and Brufut but will significantly impact on fish supply to the market.

Lack of Adequate Training and Education

Human resource development is a key factor to any society. All the local suppliers interviewed see the lack of adequate training and education centres as a real barrier. For example the manager of a furniture company admitted that they find it very hard to work with graduates of the Gambia Technical Training Institute because of the below quality standard of their performances.

High Taxation

All the arts and craft shop owners interviewed in this study agreed the high tax they are paying which is passed on to the consumer buying price has made their products very expensive thus unattractive to tourists.

FINDINGS FROM KEY INFORMANTS

Using the conceptual framework as a guideline, the researcher was able to summarise below the textual information gathered from interviews recordings and notes into two different viewpoints expressed by informants regarding improving local economic linkages with the hotel industry.

Firstly, all the informants agrees that it is possible for hotels to source more products locally provided that both parties hotels and local suppliers are willing to dialogue and communicate better either directly or indirectly through their respective associations such as The Gambia Hotel Association (GHA) and the Association of Small Scale Enterprises in Tourism (ASSET) which represents most of the local suppliers working with hotels. It would be impossible for hotels to buy from local suppliers if they don't know their products. As an informer puts it "going around hotels trying to sell after their produces are harvested is very time consuming and sometimes affect the quality of the goods".

Secondly, some informants believe that local products are often more expensive than imported goods which most of the time have better quality standards. Furthermore one informant said that products like pine apple have to be imported because they are just not grown by Gambian farmers due to technical factors that will be discussed below.

FACTORS KEY INFORMANTS THINK ARE AFFECTING THE IMPROVEMENT OF LOCAL ECONOMIC LINKAGES

Supply Related Factors

Technology and Processing Initiations

10 out of 12 informants interviewed believe that the lack of appropriate technology is a barrier to the development of good linkages. The absence of appropriate technology is affecting all the local suppliers who must mechanise and upgrade their standards in order to produce sufficient quality products and compete effectively with better standards imported goods. As two informants put it "hotels are businesses and you just cannot expect them to compromise certain standards and buy local goods that will not add value to their product".

Natural limitations

All the informants interviewed believe that natural limitation such as the three months rain fall The Gambia experiences is responsible for the seasonality as far as horticulture production is concerned. According to one informant, the same water restriction is affecting the cultivation of pine apple in The Gambia simply because the double rain fall needed to successfully grow the fruit is not available.

Quality of Local Products

All the informants believe that the issue of quality is a challenge for some local products. As illustrated in table 7, a huge amount of money is spent by hotels on beef, onions, potato and furniture simply because they cannot find the required quality locally.

Marketing and Intermediary Factors

Marketing Constraints

Nine out of 15 informants are with the view that hotels are not always aware of what is available in the local market due to the lack of an effective communication system. Furthermore all the informants believe that local suppliers with the exception of GIG, lack the sales and marketing techniques required to promote their products and services to hotels.

Local Products	Proposed Actions
Food	<ul style="list-style-type: none"> • Capacity building and introduction of appropriate technology to ensure consistent quality production: Government to work in partnership with private sector and facilitate technology transfer through technical assistance from countries with the required expertise • Improvement of health and safety standards at the national abattoir by the health and food safety Department • Better use of the River Gambia to address seasonality related to limited rain falls • Government to work with the private sector and start producing potato seeds meant for the local and international market • GIG to repeat the success of the hybrid tomato with other items such as carrot and cabbage • Formation of an Association of food producers who will be able to exchange good practices as well as market their products and services to hotels • Construction of storage facilities for fishermen and vegetable growers by the Government • Micro finance support with low interest rate by Government in partnership with the Central Bank • Establishment of a standardized food market that can be used as a marketing platform for all local producers • Duty waiver with less bureaucracy on all agricultural input • Increment of taxes on imported eggs • Reduction of credit period with hotels from one month to two weeks • Respect of agreements for payments of bills by hotels
Local Beverage	<ul style="list-style-type: none"> • Promote of local juices like baobab and wonjo in hotels • Improve the canning or bottling of these products
Furniture, soft furnishing and craft markets	<ul style="list-style-type: none"> • More high school graduates need to be encouraged to take up skilled jobs as a noble profession and be given the required training at the Gambia Technical Training Institute (GTTI) • Formation of an Association of furniture makers who will be able to exchange good practices as well as market their products and services to hotels • Duty waivers with less bureaucracy on machinery and wood • Craft market would like to have more free markets days in hotels like Sunset, Ocean Bay • Craft market would also prefer the free market day not to fall on departure days as this leaves tourists with not enough time to shop • Arts and craft shop owners would like more flexibility for rent paid to hotels just like the way they reduce their rates for tour operators when business is not good

Figure 8: Suppliers and key Informants proposed actions

Subsidies

Seven out of 15 informants find the subsidies to EU farmers a real barrier for the development of linkages as they give a competitive advantage to imported goods in terms of price. Although Government gives incentives such as duty waivers on agricultural inputs for example, six informants believe that the bureaucracy involved is time consuming and don't always benefit small local suppliers with smaller capital investments.

Government Support

Lack of Infrastructure Development

The lack of enough appropriate storage facilities for food producers is seen as a real barrier for development. Despite the construction of cold stores on some fishing sites, local producers are struggling to preserve perishable items such as fish, fruits and vegetables.

As far as upgrading the standards at the national abattoir is concerned, four informants stated that the poor quality of beef is a result of the poor stressful condition animals are slaughtered under. According to two informants the poor infrastructure at the abattoir is also a real health and safety concern that needs to be addressed.

Lack of Adequate Training and Education

All the informants unanimously agree that the lack of adequate training is a barrier to development for local producers whose poor skills affect the quality of the output. The informants further stated that the poor quality of some agricultural produce, the poor quality of finish of furniture can all be attributed to lack of required training.

SUPPLIERS AND KEY INFORMANTS PROPOSED ACTION TO IMPROVE LINKAGES

In order to improve linkages with the hotel industry, suppliers and key informants believe the actions in figure 10 below should be taken.

ANALYSIS OF FINDINGS and METHODS

This section will first analyse the research methods used before using the conceptual framework to look at the findings in the results section. The findings from three sample groups namely hotels, local suppliers and key informants will be compared with the view to triangulate the results as well as the different issues raised from the different angles (figure 8).

ANALYSIS OF METHODOLOGY USED

This analysis of the research findings will consider the limitations and advantages of the methodology used, any factors which might have affected the outcome of the data collection. The impact of the researcher on the data collection, the sampling strategy, as well as other areas for bias or error that arose that may have affected the viability and reliability of the findings will be considered.

Overall, the three methods used proved satisfactory for this research, and triangulating the different methods of data collection and perspectives of the three sample groups helped to give strength to the finding as well as highlight the difference of opinion.

Analysis of Hotel Survey

Despite the fact that the sample size was small, the response rates were very high. The hotel management showed willingness to assist the researcher and completed the questionnaire in the survey form to the best of their knowledge. The high response rate can be attributed to the self-administering of the questionnaire by the researcher who has good personal relationship with hotel General Managers.

However, a number of practical difficulties were experienced during the survey. Firstly, five out of nine hotel General Managers found the questionnaire to be too long and there took a lot of time to be completed. For some hotels the researcher had to visit on a daily basis for two consecutive weeks in order to get the survey done.

Secondly, half of the hotels in the sample were recently taken over by the new owners who brought in a new management. This situation made it very difficult or even impossible for current management to give information on items such as furniture or soft furnishing purchased by the previous owners through a contracting agent based in Europe.

Thirdly, the fact that the survey took place in the peak of the tourist season (October 2008 – March 2009), meant that all the hotels in the sample were busy serving tourists and that completing a questionnaire was not one of their priorities. So the researcher had to be extremely patient and persistent sometime in order to get information.

On a more positive note, a number of advantages in using the survey method were identified. Firstly, the fact that the researcher was an employee of ASSET who was well known in the hotel industry helped in getting the required information.

Secondly, useful quantitative and qualitative data were provided by the results which showed a number of trends, and some which could be compared to findings from previous research carried out in The Gambia in

2005 by Concern Universal in the areas of fruits and vegetable.

Analysis of Interviews with Local Suppliers

Getting information from local suppliers was not as time consuming as conducting the survey with the hotels. All the suppliers in the sample were very willing to share the problems as well as the benefits they were experiencing with the hotel industry and within themselves. After the researcher had introduced himself and explained the nature of his research, most suppliers saw him as somebody who has the answers to all their business problems and that perhaps made them more willing to spare their time and give their honest opinions of the nature of their relationship with the hotels. One furniture maker, supplier, is the only one who was brave or honest enough to criticise himself for not always meeting required hotel standards due to lack of modern machines.

Analysis of in-depth Interviews with Key Informants

The in-depth interviews held with key informants was very useful in providing information on issues affecting the tourism linkages with the local economy, in particular on the barriers that needed to be overcome and Government incentives. All the informants contacted by the researcher agreed to give an interview. The researcher's current employment with ASSET and the good working relationship he has had with key informants prior to the research probably made them more willing to give their time and opinions on the different issues raised. With key informants always keen to recommend other people to interview for more valuable information, the researcher had to draw the line somewhere to stop the research gradually turning into something very big. It would be interesting to do another research on the horticultural potentials the River Gambia has because almost all the informants believe that the River can be the answer to the water constraints that is affecting the seasonality of production.

Analysis of Conceptual Framework

The conceptual framework was very useful in identifying themes and organising the research findings, although there were issues that fitted into more than one category. However, overall the five categories of the framework (demand related, supply related, marketing and intermediary factors and Government policies) were broad enough to include a few new issues that had not been identified.

RECOMMENDATIONS

Based on the research findings the following recommendations for action are made to improve the local economic linkages with the hotel industry.

1. Upgrade the standards of education at the Gambia Technical Training Institute (GTTI) by introducing new programmes that are in line with modern furniture industry. There should be a better supervised practical training/work placements for GTTI students. This requires a better collaboration between the private sector and the GTTI. There is a need to form a Public-Private Partnership consisting of lecturers of the GTTI and members of the private sector who would be employing the graduates of the technical institution should be set up in December 2009 with the view to look at the issues together and address them accordingly. The setting up of this Partnership should be facilitated by the National Training Authority whose mandate is to monitor and make sure that quality professional training is delivered in all learning institutions in the country.

2. Since furniture making has for a long time been attracting illiterate young people, the GTTI should have adult literacy programmes combined with refresher courses for existing furniture makers who were not lucky enough to attend the conventional school system. This will help improve their accuracy in taking correct measurements which at the moment is a real issue with local furniture makers. ASSET should engage the furniture makers to form an Association by July 2009 with the view to exchange good technical practices, set up their own marketing platform in forms of brochures/catalogues as well as having a comprehensive website showcasing their products and services. From September 2009, ASSET should start working in partnership with the GTTI on training programme geared towards improving standards for skilled workers within its membership.

ASSET should organise study visits in August 2009 to locals hotels where the furniture and soft furniture makers can familiarize themselves with the style and quality standards used.

3. Considering the fact that the majority of tailors and designers in the fashion industry in The Gambia come from the west African sub-region, Government in partnership with the Fashion Designers Association should in a year's time establish the first ever high standard fashion and design institute that will build the capacity of young Gambian fashion designers who will be able to deliver better quality soft furnishing to the hotel industry, the local and international markets.

1. The Gambia Government and the Ministry of Agriculture in particular should from October 2009 start working in partnership with GIG in order to reproduce the GIG success story in introducing good agricultural practices in the northern and southern bank Regions in

other parts of the country. This time frame will allow locals to practice their traditional farming during the rainy season (June – September). Furthermore the two organisations should in November 2009 do an experiment in the Central River Region to see whether pine apple which require a double rainfall to grow can be introduced in areas along the River Gambia where water is available in abundance throughout the year.

2. Rather than wait for Government to build expensive storage facilities that are usually very expensive to maintain, farmers should from December 2009 start working with Non Governmental Organisations like Concern Universal UK and learn the technique of making storage facilities using locally available material. With a good natural ventilation system these facilities can keep fruits and vegetable for three months without needing electricity powered cold storages which are very hard to sustain considering the high cost associated with it.

3. In order to reduce the high leakages in beef, the Government should from now on start working in partnership with the private processing meat factories like Kombo Meat in order to upgrade the standards of the national abattoir which currently needs cold storage facilities and a well trained staff working in a good health and safety environment.

Similarly The Government should work with partner countries like Taiwan who are more experienced in poultry farming in order to give additional support in the area of technical assistance to poultry farmers like Rue Chicken Limited who would like to start producing local chicken in mass in their modern processing farm.

4. A one stop shop with less bureaucracy issuing duty waivers for both small and local farmers importing agricultural inputs should be set up by Government by December 2009 latest under the auspices of GIPFZA who are already providing this service to investors with more than \$ 100,000. This will help address the currently time consuming and unnecessary bottle necks organisations are subject to.

5. In partnership with private banks The Government through the Central Bank should by August 2009 start working on a micro finance scheme that will allow local suppliers to borrow money and develop their businesses without having to pay the high interest 30% loan currently being charged.

6. The Responsible Tourism Partnership should from the next tourist season beginning in October 2009 start naming in the local and international media hotels who fail to honour payments on time to local suppliers.

7. All local suppliers to hotels should organise themselves into associations before the beginning of the season in October and be members of ASSET with the view to form a united force as well as take advantage of the good working relationship existing between ASSET and the Gambia Hotel Association in order to increase their revenue.

Table 10: Sample Hotels

Hotels	No of Rooms	Star Rating	Operation Period	Location	Ownership
Safari garden	18	2*	12 months	Fajara	British
Golden Beach	25	3*	6 months	Bijilo	Gambian
Kombo Beach	258	3½*	12 months	Kololi	British
Sunset Beach	97	3*	12 months	Kololi	Gambia-Lebanese
Corinthia Atlantic	204	4*	12 months	Banjul	Libyan
Ocean Bay	195	4*	12 months	Bakau	Gambia Government
Kairaba	156	5*	12 months	Kololi	Kwati
Senegambia	340	3½*	12 months	Kololi	Italian/ Gambian-Lebanese

Source: Gambia Tourism Authority and Gambia Tourism Master Plan 2006

PROFILE OF HOTELS

The selected hotels which took part in the study range from small accommodation providers with 18 rooms to five star establishments with more than 200 rooms. The sample may be small but it represents 45% of the total bed capacity in The Gambia. Tables 10 below give more information about the sample hotels.

PROFILE OF LOCAL SUPPLIERS

GIG

Established in 2004 by Concern Universal, a British NGO, in collaboration with UK's leading organic fruit producer, Haygrove, Gambia is Good (GIG) is a pro-poor business designed to link remote local farmers with the high value tourist market. In 2005, the UK based charity the Travel Foundation came on board to help establish the GIG Farmyard, which has three main purposes in life:

1. To help provide some of the most needed items so that hotels can always keep their customers happy!
2. To demonstrate and train local producers
3. To give tourists the opportunity to learn about Gambian farming in an engaging and responsible way (GIG 2008).

KAHNEN POULTRY FARM

The farm was established in 2003 by Mr. Ali Khan, a Gambian entrepreneur, with the aim of providing fresh local eggs to the hospitality industry and the Gambian public at large. Located in Tujereng in Kombo South, Khanen poultry farm has over 6,000 chicken layers and it is according to many the biggest poultry farm in the

country in terms of output. The farm supplies fresh eggs to all the major hotels and supermarkets in the country.

RUE CHICKEN LTD

Rue Chicken Limited is the most modern poultry processing farm in The Gambia with up to date machinery in the areas of hatching, slaughtering, packaging and storage. The Gambian owned farm was set up in 2008 with the view to produce broiler chicken for local and international markets as well as supplying chicks to smaller farmers at a cheaper rate than what they are getting them from Holland and Senegal. The Chief Executive Officer (CEO) and proprietor of Rue Chicken is a young Gambian who has over 8 years experience in poultry farming in The United States of America. After two hatching trials, the CEO believes that Rue Chicken is now ready to supply locally produced chicken to the market. The hatching of four thousand chicks was successfully carried out in early March 2009 and they would wait another forty days before being fit for consumption. Rue Chicken is currently employs 15 Gambians in the farm and two expatriate technicians who are providing the technical assistance.

KOMBO MEAT

Kombo Meat is currently the only processing meat outfit in The Gambia. Located in the Kanifing Industrial Area, the private owned company purchases local livestock mainly beef from the local abattoir in Abuko, butchers it themselves and produce a range of processed meat products including assorted steaks, sausages, ribs and smoked meats. They produce under reasonably sanitary conditions and operate well-maintained cooling chambers (5° Celsius) and freezer (0° Celsius). Products from these plants are freely sold to local supermarkets and to hotels and restaurants. Kombo Meat supplies beef to hotels, restaurants and major supermarkets in the country.

Abdoulaye Seck	GIG, Horticulture Expert
Omar S. Njie	GIG, Finance and Administration Manager
Adama Bah	The Travel Foundation UK Destination Manager in The Gambia
Sheikh Tejan Nyang	Ministry of Tourism Master Plan Coordinator
Abdurahman Jobe	Ministry of Agriculture, Deputy Permanent Secretary
Kaliba Senghore	Ministry of Tourism, Permanent Secretary
David Sarr	Former owner of Kombo Meat Ltd
Momodou S. Jobe	Gambia Tourism Authority, Acting Director General
Buna Njie	Sunset Beach Hotel, General Manager and Vice Chair of The Gambia Hotel Association
Musa Bah	The Gambia Investment and Promotion Marketing Agency, Manager
Alieu Secka	Chair of Gambia Hotel Association
Badou Bobb	Chair of ASSET

Figure 9: List of informants

MIDDLE MEN

These are groups of men and women who serve as intermediaries between producers and hotels. They work in the areas of fruits and vegetable. By and large they have monopoly control of the supply of fish and seafood such as prawns to hotels and restaurants.

FASHION DESIGNERS ASSOCIATION

The Fashion Designers Association was established in 2001 with the aim to work together in the areas of product development, marketing and networking. The Association consists of over 50 members the majority of whom are female designers. The current president of the Association, Mrs. Ndeye Awa Khan revealed in an interview with the researcher that they have never had a business contract with any hotel. However, she was quick to state some members of the Association supply soft furnishing to some hotels. According to the President, The Association has the capacity to meet hoteliers' demand of soft furnishing. The Association does not currently have an office. Administrative work is being carried out at the premises of the current President.

YOBA CARPENTRY COMPANY

The company is a wooden furniture making business that is owned by a Gambian by the name of Omar Jallow. Yoba is equipped with the necessary machinery to make good and reliable furniture. Located in Majai Kunda, the company currently employs three staff and rely on other six helpers who are there as trainees. Yoba is not working with any hotel at the moment but the proprietor, Mr. Jallow believes his company has all it takes to serve the hotels industry in a very satisfactory manner.

N.G ENTERPRISE

N.G ENTERPRISE is a local furniture making company that was set up 15 years ago by a Belgian national and his Gambian wife. Located on the Kombo Coastal Highway in the Brikama Area Council of the Western Region, the company employs 16 Gambians and makes furniture for hotels like Sunset Beach, Kombo Beach, Ngala Lodge and Makasutu Culture Forest. N.G is equipped with the modern machines that are needed to produce quality furniture and their staff is well trained. Two years ago, the company decided to combine furniture making and building of residential houses in a bid to diversify the range of services they offer.

AFRI WOOD TIMBER AND FURNITURE

The company was established in 2001 by a Gambian woman entrepreneur by the name of Ndeye Awa Khan. Based in the Kanifing industrial area, the wood and furniture company is equipped with modern machines and a qualified staff with over eight years experience. Afri Wood Timber and Furniture supply imported wood to building companies but they also make furniture for hotel industry. The hotels they work with are Paradise Suites, Ocean Bay, Coconut Residence, Makasutu and Bakotu hotels.

PROFILE OF KEY INFORMANTS

A total of 15 informants who all had an understanding of the tourism linkages with the local economy were interviewed. Participants were selected based on the researcher's judgment about who had the required information, and most of all who was really willing to share their viewpoints. Figure 9 gives the names of participants and the organisations they work for but the content of their individual interviews has been kept anonymous (figure 9).

CONCLUSION

The main aim of this research was to assess the potential for more linkages as well as looking at barriers that needed to be overcome. The research brought together a variety of past research and details of present PPT projects that all looked at local economic linkages with the accommodation sector from very different angles.

From the findings of this research, the potential to improve local economic linkages with the hotel industry in The Gambia is huge but there are barriers that need to be overcome by the hotels, the local suppliers as well as Government. This is in line with the conceptual framework developed by the researcher at the start of the field work based on the findings of the preliminary literature review. Factors ranging from demand to marketing related issues influence local economic linkages with the hotel industry.

The conclusions that can be drawn from the research are as follows:

Firstly, all the hotels interviewed would love to do more local sourcing provided the quality of the product is good and the prices are not too high. For hoteliers the quality of the product is more of a determining factor for sourcing than the price. The significant amount of money spent on local eggs by hotels despite the fact that they cost more than the imported eggs is a good example. Other than satisfying their needs in food, beverage and furniture, hotels in The Gambia are increasingly seeing local sourcing as part of their corporate social responsibilities. Ocean Bay, a 5* hotel, is proudly displaying at their reception the award won for being the hotel that bought more locally grown vegetable and fruit from GIG in 2008.

Secondly, local suppliers recognise that there is a need to improve their product quality and would like more support from Government in relation to capacity building, infrastructure development as well as special incentives like duty waivers on imported agricultural inputs and furniture making machineries. However, the real support should come from the suppliers themselves who need to organise themselves in working associations that will give them more bargaining powers rather than doing business individually with mainstream tourism.

Finally, the late payment of their invoices by hoteliers is another factor that is seriously affecting the businesses of local suppliers. The current business relationship between the majority of the hotels and local suppliers is not based on fair trade principles. In fact, it is very common for local suppliers to bribe or pay a commission to Purchasing Managers in order to get business. Ironically this unethical business practice does not even guarantee local suppliers payments on time. So the need for individual local suppliers to form a strong business association that will look after their interest is well overdue.

This research suggests that it is possible to improve the local economic linkages with hotels and reduce the amount of money that is currently being spent on imported goods. The research further supports the 2006 Tourism Development Master Plan vision on strengthening agricultural and horticultural linkages as this will spread the tourism benefit beyond the Tourism Development Area. It is hoped that this research has provided a workable framework for linkage opportunities between the accommodation sector and the local suppliers. However, there is a need for more research that will bring together academics and practitioners from both the hotel industry and the local suppliers with the view to look at the sustainability of the existing business relationship and the formation of a hotel supplier partnership that can serve all the parties fairly.

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