THE IMPACT OF THE DEVELOPMENT OF TOURISM ON EMPLOYMENT
IN GAMBIA

By A.C.R. WHEELER
assisted by M.P. van DIJK

June 1974
The Dakar task force of the Jobs and Skills Programme for Africa, a component of I.L.O.'s World Employment Programme, undertook an exploratory mission to Gambia in December 1973, to investigate with the authorities, the possibilities of undertaking research or advisory projects on employment questions.

As a result of this mission the Gambian authorities requested the task force to undertake a study of the impact of the development of tourism on employment. Preliminary study of the literature available was carried out in Dakar, and Messrs. Wheeler and Van Dijk of the Dakar task force returned to Gambia in March 1974 to collect data for the study. The resultant report was written between April and June 1974.

The authors would like to record their gratitude to the Gambian authorities and to the staff of the UNDP office, Banjul, for their willing assistance in the preparation of the study.
CONTENTS

Chapter I - Introduction

Chapter II - The Development of Tourism in Gambia - Nature and Extent.

Chapter III - The Future of Tourism in Gambia.
   (a) Resource Constraints on Tourism Development
   (b) Price Constraints on Tourism Development
   (c) Market Constraints on Tourism Development
   (d) Prospects for Tourism Expansion

Chapter IV - Current Employment in Hotels

Chapter V - Current Indirect Employment Based on Tourism
   (a) Restaurants, Bars, Night-Clubs and Entertainments
   (b) Travel Agencies and Tour Operators
   (c) Taxi Services
   (d) Production and Sale of Handicrafts and Souvenirs
   (e) The Cultivation and Supply of Foodstuffs for Tourist Consumption
   (f) Construction
   (g) Conclusions about Current Indirect Employment derived from Tourism Development.

Chapter VI - Additional Employment Likely to be Generated by the Further Expansion of Tourism
   (a) Additional Employment in Hotels
   (b) Additional Employment in Activities Dependent on Tourism
      (i) Restaurants, Night-Clubs, and Places of Entertainment
      (ii) Travel Agencies and Tour Operators
      (iii) Taxi Services
      (iv) Production and Sale of Handicrafts and Souvenirs
      (v) The Cultivation and Supply of Foodstuffs for Tourist Consumption
   (vi) Construction.
Chapter VII - Gambianisation and Training

(a) Hotel Managers and Supervisors
(b) Tourist Guides
(c) Restaurant and Night Club Operators
(d) Training for Skilled Hotel Workers
(e) Other Hotel Workers

Chapter VIII - Conclusions and Recommendations

(a) Conclusions
(b) Recommendations.
The economy of Gambia, one of the smallest independent countries in Africa, has until recently depended almost wholly on the production and export of agricultural commodities, principally groundnuts and their derivatives. Small numbers of cattle are exported to neighbouring countries, and rice, vegetables and millet are produced for local consumption, though not to a sufficient extent to make the country independent of imports of staple foodstuffs.

This simple economic structure has been associated with a relatively high density of population for Africa, 47 persons per square kilometre (1), and a rapidly expanding education system, which has meant that in the area around Banjul in particular youth unemployment has become a common phenomenon, accentuated by a movement of educated young people from other areas of the country to the capital.

Against this background since 1965 Gambia has been the scene of a significant development of international tourism. Tourism is of interest in the Gambian development context because it provides an opportunity for economic diversification in an economy which has few other such possibilities outside agriculture. There appear to be only minor mineral resources, the country is too small to support many industries, and neither fisheries nor forestry offer more than a modest potential. The further development of agriculture is likely to be based mainly on crop diversification and the more intensive exploitation of existing holdings, because of the scarcity of uncultivated land.

Among the potential benefits which the development of tourism can offer to the Gambian economy are foreign exchange earnings, foreign investment in the domestic economy, and the creation of jobs for Gambians. Against this must be considered the domination of the tourism sector by foreign interests wishing to repatriate their profits made in Gambia, the need for additional imports to satisfy tourist consumption while in Gambia, additional expenditures incurred by the authorities in support of tourism, and the possibly unfavourable demonstration effects of close contacts between comparatively wealthier European tourists and relatively impoverished Gambians, in particular the younger age groups. This report concentrates primarily on the impact of the development of tourism on employment, but some of the other potential benefits and disadvantages of such development will be referred to in passing as far as they affect employment.

The following two sections of the report describe the recent development of tourism and its potential for further growth. This is followed by assessments of the employment currently generated in the hotels and in other sectors of the economy wholly or partly dependent on tourism for their demand. The impact of further tourism growth on additional employment creation is considered, together with the special problem of Gambianisation of employment in tourism, and the report concludes with a series of conclusions and recommendations.
CHAPTER 11
THE DEVELOPMENT OF TOURISM IN GAMBIA - NATURE AND EXTENT

Three distinct components of tourism in Gambia may be identified:

1) Package holiday visitors coming by charterflight from Northern Europe, especially Scandinavia, usually for two week holidays. This traffic began in 1965 and has expanded rapidly, to the point where it now accounts for the great majority of tourist-days spent in Gambia.

2) Tourists on cruise ships making a short stop at the port of Banjul, usually for no more than 24 hours. This traffic began in 1968, but has shown a tendency to decline in recent seasons.

3) Overland tourists mostly coming from Senegal. This traffic has been facilitated by improved road communications, but information about its extent is limited (1)

The following tables give information about the numbers of tourists visiting Gambia in recent years.

(1) Preliminary figures from the 1973/74 monthly tourist statistics suggest that less than 200 such tourists visit Gambia each month, the great majority staying less than 1 week.
Table 1 - Tourists visiting Gambia since 1966/67

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Charter Flight</td>
<td>528</td>
<td>796</td>
<td>806</td>
<td>1.207</td>
<td>2.601</td>
<td>8.031</td>
<td>15.584</td>
</tr>
<tr>
<td>Cruise Ship</td>
<td></td>
<td></td>
<td>2.134</td>
<td>4.094</td>
<td>7.274</td>
<td>7.135</td>
<td>5.065</td>
</tr>
</tbody>
</table>


(Similar data for arrivals by road were not available until 1973)

While Table 1 shows the number of tourists visiting Gambia, it is important in assessing the impact of tourism on employment to consider also the length of time tourists spend in the country. For this purpose the interesting statistic is the total number of tourist-days spent in Gambia by each of the categories of tourist referred to in Table 1 above. This requires that the number of tourists in each category be multiplied by the average number of days of their stay. In general cruise ship tourists spend approximately 24 hours in Gambia, whereas air charter tourists spent an average of 12.5 days in 1972/73, though this represented a slight decline from previous years.

Multiplying average lengths of stay by the numbers of tourists in each category, we arrive at the figures for total tourist days shown in Table 2.
Table 2. Total Tourist Days spent in Gambia

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Cruise Ship</td>
<td>-</td>
<td>-</td>
<td>2.134</td>
<td>4.094</td>
<td>7.274</td>
<td>7.135</td>
<td>7.148</td>
</tr>
</tbody>
</table>


From the information in Table 2 it is clear that charter flight tourists represent the great majority of tourist days (approximately 96.5%) spent in Gambia, and that their proportion in the total has increased rapidly recently. This conclusion becomes more significant when it is considered that during their brief visits to Gambia, the only tourist facilities which cruise ship tourists are likely to utilise are travel agents arranging local tours, souvenir-sellers, and possibly some entertainment facilities. In fact less than 10% of the expenditure on tourist excursions in the 1972/73 season came from cruise-ship tourists. (1) Hence the role of this group of tourists as a generator of local employment is probably minimal in relation to the impact of the industry as a whole.


Table 24.
The most important limitation of tourism in Gambia in relation to employment creation is its seasonality. The great majority of charter-flight tourists come during the November-April period, while cruise-ships mostly call between December and March. During the months June to September no tourist arrivals have been recorded in the years since 1966/67 (2).

Table 3. Monthly distribution of tourists by means of Travel

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Charter Flight</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1970/71</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>252</td>
<td>507</td>
<td>512</td>
<td>502</td>
<td>582</td>
<td>246</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>1971/72</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>780</td>
<td>1367</td>
<td>1551</td>
<td>1511</td>
<td>1588</td>
<td>974</td>
<td>257</td>
<td>-</td>
</tr>
<tr>
<td>1972/73</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>402</td>
<td>2373</td>
<td>2348</td>
<td>3270</td>
<td>2711</td>
<td>2445</td>
<td>2004</td>
<td>31</td>
</tr>
<tr>
<td>1973/74</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>907</td>
<td>3313</td>
<td>3931</td>
<td>3728</td>
<td>3362</td>
<td>3192</td>
<td>1950</td>
<td>x</td>
</tr>
<tr>
<td>Cruise Ship</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1970/71</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>1510</td>
<td>2390</td>
<td>1518</td>
<td>1856</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>1971/72</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>295</td>
<td>988</td>
<td>2685</td>
<td>1901</td>
<td>1266</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>1972/73</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>684</td>
<td>1824</td>
<td>1657</td>
<td>900</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>1973/74</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>59</td>
<td>1774</td>
<td>515</td>
<td>213</td>
<td>320</td>
<td>-</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Overland</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1973/74</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>147</td>
<td>108</td>
<td>110</td>
<td>125</td>
<td>89</td>
<td>87</td>
<td>104</td>
<td>x</td>
</tr>
</tbody>
</table>

x Data not available.

Source: As table 1 above, and monthly tourist statistics for 1973/74.

(2) It is possible that overland arrivals do not reflect this seasonal pattern, but their numbers appear to be so small as not to affect the general conclusion.
The Gambian climate is extremely agreeable for Europeans during the period from mid-October to April, corresponding to the period of cooler weather in Europe. During the rest of the year Gambia has a hotter and more humid climate, with several months of rain. The attraction of Gambia for tourists from Europe is thus essentially the combination of good beaches with a sunny climate at a time of the year when conditions are not so good at the alternative destinations in the Mediterranean area. During the Mediterranean and European summer the Gambian climate is too hot and humid to attract European tourists, when in any case the nearer Mediterranean destinations are at their best from the point of view of tourists seeking a beach holiday.

The type of tourist the country can attract is also limited by the type of attraction Gambia can offer. There is relatively little available in the way of sophisticated urban entertainments, majestic scenery, or spectacular wildlife, in all of which respects other parts of Africa are better endowed. Nor are there any major cultural features which distinguish Gambia from its neighbours in the eyes of the non-specialist, and the only important historical sites are the stone circles in the interior which so far remain unexploited and difficult of access.

The fine beaches and good winter climate, and the limited availability of other types of attraction, ensure that holidays in Gambia are essentially beach holidays. This is not necessarily a disadvantage since a large share of tourism internationally is oriented towards this type of holiday, i.e. Gambia can potentially respond to the priority needs of the mass tourist. A reflection of this is that there is already a significant amount of return traffic with previous visitors coming for a second or even subsequent visit.
The scale of this phenomenon has been variously estimated by some of those involved in the industry at between 5% and 10% of tourist arrivals in the most recent seasons, which is high compared with the experience of other tourist destinations.

From the foregoing remarks tourism in Gambia may be characterised as essentially the provision of package beach holidays for charter flight tourists coming predominately from northern Europe during their winter. Over 90% of those arriving each year have hitherto been from the Scandinavian countries, mainly Sweden and Denmark, with the British being the only other significant nationality. It is thought that many of the Scandinavian tourists coming to Gambia are manual workers and their families. The more educated group may seek a holiday destination offering a wider range of attractions.
CHAPTER III
THE FUTURE OF TOURISM IN GAMBIA

As suggested above, Gambia's tourist future appears to lie in the expansion of the charter flight traffic during the winter season. The other types of tourist currently visiting Gambia do not seem destined to increase significantly - cruises as a form of holiday are likely to be seriously affected by rising transport costs, and there is nothing to suggest that overland tourism will grow substantially.

Among the factors likely to influence the further development of tourism in Gambia are the rate at which new hotels are brought into operation, the extent to which the prices of holidays in Gambia can be kept down in a context of rising costs, and the degree of success in diversifying the sources from which tourists are drawn.

a) Resource Constraints on Tourism Development

At present the majority of hotels in Gambia, including all the largest ones, cater only to the charter flight traffic. They open only during the charter flight season, and are virtually fully booked by the tour operators for that period. Most of the remaining hotels are at least partly used by the tour operators during the charter flight season. Thus a precondition of any significant further expansion of charter flight tourism, given the climatic limitations on any lengthening of the season, is the opening of additional hotels. This is not quite so straightforward a step as might be first thought, because the existing built-up areas along the coast are already exploited to the desirable limit, so that further tourism development
presupposes the opening up of new areas to the south. All the necessary infrastructure - roads, water and electricity supplies, sewerage systems, housing for hotel workers and their dependants - must be installed before any new hotel investments can take place, since these new areas at present have no development of urban facilities.

Plans have been prepared for this purpose, but their fruition will be dependent on outside financing, because the size of the investments involved would be disproportionate in relation to Gambia's budgetary or private resources.

For the same reason, the limited supply of local capital, much of the investment in new hotels must be expected to come from foreign investors. The possibility of attracting these will also be closely linked to the prospects for expanding tourism and the profits to be gained from it, discussed in further detail below.

Finally there are potential skilled labour scarcities which could also delay new hotel investment, and which again are discussed in subsequent sections of this report. For the moment it may be mentioned that additional hotel investment will presuppose an increased supply of skilled construction workers, for both infrastructure and hotel construction, and secondly there must be the means to supply increased numbers of qualified hotel staff.

b) Price Constraints on Tourism Development

From the foregoing paragraphs it is clear that the development of new hotels is one of the bottlenecks to be overcome if tourism is to be expanded.
Another difficult problem is that of holding down the prices of holidays in Gambia in the context of rising costs. As mentioned above the type of holiday which Gambia can offer puts it in direct competition with a number of Mediterranean destinations for European tourists. Gambia’s advantage is that it can offer such holidays at a season when its competitors are less attractive, but against this must be weighed Gambia’s greater distance from the sources of tourists, which implies a higher element of transport cost in the total cost of the holiday. With the recent substantial rises in fuel costs, the prices of holidays in Gambia must increase unless costs can be reduced significantly in other directions. The prospects for this do not appear very hopeful. Beginning with the 1974/75 tourist season there will be a bed tax on nightly tourist occupancy. To the extent that the industry depends on imports, e.g. of certain foodstuffs, for its supplies, this element of its costs is also likely to increase as a result of general world inflation (again, rising fuel costs will also be a factor). As yet, few hotel workers belong to trade unions, but if union membership increases during the next tourist seasons, this may be expected to result in increased pressure for higher wages, quite apart from domestic factors (higher local cost of living, etc...) also pushing in this direction.

Thus the general prospect is for increasing costs, and a large part of these increases will be due to factors outside the control of the tourist industry or the Gambian authorities.

This suggests that if prices of holidays to Gambia are to be kept down, this can only be done by cutting profit margins in the tourist industry. However a factor modifying this conclusion is that at least some of the forces making for higher costs (transport costs, costs of
imported goods consumed by the tourist industry) will to a certain extent also affect Gambia's potential competitors in the Mediterranean area. A final observation on this point therefore might be that maximum cost consciousness will be essential to permit profitable operation while minimising price increases of holidays in the Gambia in the near future. This presupposes in any case a certain reduction in existing profit margins.

c) Market Constraints on Tourism Development

The above conclusion leads on to a third condition for the further expansion of charter flight tourism in Gambia - the necessity of tapping additional sources of tourists. Hitherto Gambia has relied almost exclusively on Scandinavian countries as the sources of its tourists. The relatively small population of these countries, despite their high per capita income levels, makes it questionable how far they can continue to provide increasing numbers of tourists coming to Gambia (1). The immediately obvious alternative sources are the neighbouring North European countries, e.g. West Germany, the Netherlands, the United Kingdom, Belgium, Austria, and Switzerland. Of these West Germany as the wealthiest and most populous country perhaps offers the best prospect. The United Kingdom may offer a less interesting prospect because of the shorter annual holidays enjoyed by British workers as compared with most of their European counterparts, and because the habit of taking winter holidays is less developed. The other countries mentioned do not suffer so much from these disadvantages, but their smaller size implies a lesser potential as sources of tourists to Gambia.

(1) In this context it is worth considering that families with school age children must be largely excluded from the potential sources of tourists to Gambia because the tourist season does not coincide with the main school holidays in Europe.
### d) Prospects for Tourism Expansion

If we assume that Gambia has a 28 week tourist season from mid-October to the end of April, and that charter flight tourists each spend an average of two weeks in the country (2) this implies that each additional hotel bed can generate up to an additional 14 tourists per season.

Making the further assumption that full occupancy is not achieved at the beginning and end of the season, a safer figure might therefore be 12 additional tourists per additional tourist bed. This of course presupposes that the present arrangement, whereby tour operators and hotel operators negotiate a 100% occupancy of hotels over as much of the season as possible, is continued in new hotels.

Current building plans for new hotels in Gambia include a 225-bed hotel which should be completed during the 1974/75 tourist season and a 340-bed hotel complex on which work is hoped to start in July 1974. Assuming that the first of these projects can be completed for Christmas 1974, then an additional tourist capacity of 1800 can be created during the 1974/75 season. This supposes that eight two-week tourist holidays will be accommodated in the hotel during the remainder of the 1974/75 season. If the second project can similarly be completed in time for Christmas 1975, then it will on the same supposition create a further additional tourist capacity of 2,720 in the 1975/76 season, plus an additional 900 from a full

---

(2) As was mentioned earlier, the average length of stay was only 12.5 days in the 1972/73 season, implying that slightly more tourists can be accommodated than we have assumed but against this is the consideration that our assumption below of 12 tourists per bed per season may be slightly optimistic in relation to past occupancy rates. Therefore these two factors tend to cancel each other out.
season's operation of the 225-bed hotel. In addition there could be a further increase of some 2700 tourists if the first of the new hotels within the Bafuloto project came into operation during this season.

The implications of these figures need to be considered in relation to the previous rates of growth of the numbers of tourists, as shown in Table 4, which assumes overall rates of occupancy in future seasons similar to those achieved in the past.

Table 4. Growth of Charter Flight Tourism

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of tourists</td>
<td>8,031</td>
<td>15,584</td>
<td>20,343</td>
<td>23,600</td>
<td>29,800</td>
</tr>
<tr>
<td>% increase over previous season (rounded)</td>
<td>94%</td>
<td>31%</td>
<td>14%</td>
<td>26%</td>
<td></td>
</tr>
</tbody>
</table>

(1) Up to 30 April 1974. Before the most recent monthly figures were available, a total for the 1973/74 season of 21,800 tourists had been projected. This figure was arrived at by taking the increase recorded during the period October 1973-January 1974, as compared with October 1972-January 1973, and extrapolating this rate of increase to cover the whole of the 1973-74 season. In other words the rate of increase fell considerably during the latter part of the 1973/74 season, presumably due to the less settled economic conditions and rising prices. The implications of this for the future are worth pondering.
It is clear from these figures that the present slowing in the rate of new hotel construction is going to reduce appreciably the rate of increase of tourists in the next two seasons. In fact the situation may be even less healthy than the foregoing calculation suggests, because there is a possibility that the high occupancy rates assumed will not be realised, e.g. if holiday prices increase significantly as seems possible. The counter-consideration that the unused capacity among some of the hotels in Banjul city would permit greater numbers of tourists to be accommodated is probably relatively unimportant since most of these hotels are located away from the beaches and have a lower standard of facilities than the main tourist hotels, and hence would be less acceptable to most tourists.

A positive aspect of the impending slowing down of the rate of increase of tourist numbers is that during this period greater efforts can be made to diversify the future sources of tourists by advertising etc. The results of such efforts could then come to fruition after the 1975/76 season by which time a further expansion of new hotel-building could be taking place.

The prospects for new hotel-building after 1975/76 are dependent on the speed with which the necessary infrastructure is installed in the areas to be opened up for tourist exploitation. Present plans are for between 450 and 750 new beds to be added, in the form of new hotels, each year up to the early 1980s. Beyond this, the influence of cost-increasing factors must be kept to a minimum, and interesting market prospects in all the Northern European countries clearly demonstrated in order to attract hotel investors to take advantage of new infrastructure facilities as they become available. Only if all these conditions are satisfied is it reasonable to hope that there will be a further substantial growth in the Gambian tourism industry in its present form beyond the next two years. The implications of this conclusion for the future development of employment in the tourism industry are discussed in a later chapter.
CHAPTER IV

CURRENT EMPLOYMENT IN HOTELS

Total employment in hotels in Gambia has been between 1000 and 1100 persons during the 1973/74 tourist season, the figure varying slightly from month to month.

A useful distinction can be made between those hotels which are wholly concerned with the package tourist trade, those which also serve other travellers, and those which do not participate at all in package tourism. There are 5 hotels with 1427 beds which cater entirely to package tourists, another 5 hotels with 388 beds which cater partly to package tourists, and 3 small hotels with a total of 56 beds which are concerned only with local travellers. This last category is not discussed in detail here, since it appears to have no potential role to play in international tourism.

Table 5. Employment by Category of Hotel, 1973/74

<table>
<thead>
<tr>
<th>Category of Hotel</th>
<th>No. of hotels</th>
<th>No. of beds</th>
<th>No. of employees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wholly package tourist hotels</td>
<td>5</td>
<td>1427</td>
<td>821</td>
</tr>
<tr>
<td>Partly package tourist hotels</td>
<td>5</td>
<td>388</td>
<td>177</td>
</tr>
</tbody>
</table>

From Table 5 it may be seen that the wholly tourist hotels are significantly more labour-intensive than the other category, since they employ 0.58 persons per bed, whereas the other hotels employ only 0.46 persons per bed. It may reasonably be expected that this finding is relevant to the
further development of hotels in Gambia, because the equivalent ratio for each of the five tourist hotels lay within the range 0.49 to 0.66, a rather small variation.

Conversely, in the other, "mixed" group of hotels, employment ratios per bed varied between 0.22 and 0.84 employees.

The occupational breakdown of employment in the different types of hotels does not appear to vary significantly, except that as might be expected the larger hotels have more people involved in management and ancillary activities. Some 50% of the employment in hotels is in skilled jobs e.g. waiters, room-boys, barmen, reception staff, junior cooks, and maintenance personnel. Less skilled jobs include kitchen labourers, watchmen, gardeners, and cleaners, and these make up perhaps 40% of hotel employment. The remaining 10% include management and supervisory staff in the various departments of hotel work.

From the incomplete data available (only 7 of the 10 hotels were immediately able to supply a detailed breakdown of their employment by occupation), it can be estimated that some 100 of those employed in the 10 hotels covered by Table 5 are working in the above-mentioned managerial and supervisory categories. Between 60 and 70 of these are expatriates, but this number is gradually being reduced as qualified Gambian replacements become available. Some hotel managers claim that the higher costs of expatriate staff are a strong incentive to speed up this process as fast as possible, and in this context trainable Gambians are being sent abroad for training and experience.

Since most of the hotels close down completely, or considerably reduce the level of their activity, outside the charter-flight season the majority of their staff is therefore laid off for up to five months. The senior and/or more skilled employees are paid a retainer of up to one third of their.../...
normal salary during the close season, and small numbers of people are employed on maintenance and security work throughout this period. Also before and after the season there are periods of up to a month during which preparations for opening are being made, and the closing-down operation is being carried out, during which many of the staff are working on a full-time basis. The practice and experience of the different hotels vary somewhat in these matters, but all the managers interviewed reported that at least two-thirds of their workers had nevertheless remained with them through successive seasons. Figures supplied by the Labour Department for 1972 showed that the monthly numbers of applicants for jobs as hotel-workers showed marked peaks in June and again during September -October, at the end of one season and before the start of the next.

The training of the skilled categories of hotel staff has hitherto been mainly an internal affair for each hotel, under the guidance of its management, essentially through on-the-job training with the more experienced staff guiding the less experienced, and the gradual evolution of supervisory personnel. Since 1972 the hotel staff training project, under ILO auspices, has in part assisted the hotels in their in-service training, and also has organised a number of courses in such fields as housekeeping, restaurant and bar duties, front office work, and kitchen work. As far is known, almost all of the graduates of these courses have subsequently entered hotel work.

Another aspect of training has been the sending abroad of a few Gambians, recruited by the hotels, to gain training and experience to enable them to subsequently replace the expatriates in senior positions. This type of training is most easily provided by those hotels which are part of an international hotel chain, but the main limitation is the scarcity of sufficiently educated and qualified entrants able to absorb training at this level.

None of the hotels visited reported any significant number of vacancies,
so that it seems true to say there is no absolute shortage of hotel-workers below the managerial and supervisory level. The difficulties lie rather in the scarcity of Gambians to replace expatriates in senior positions, and the comparatively limited experience of many of the workers at the skilled level, i.e. the deficiencies of the present hotel labour force are qualitative rather than quantitative.
CHAPTER V

CURRENT INDIRECT EMPLOYMENT BASED ON TOURISM

Apart from the employment created in hotels, tourism is also a generator of jobs in other sectors of the economy concerned with the provision of goods or services required by the tourists. In most of these sectors the demand from tourists represents only a part, and sometimes only a minor part, of the demand for their output. Nevertheless the existence of the tourism industry has the effect of increasing production and employment in these sectors beyond what it would be in the absence of tourism.

a) Restaurants, Bars, Night-Clubs and Entertainments

In this sector the restaurants, bars, and night-clubs located in the hotels are not included, since their staff are considered to be part of the hotel labour force. Apart from the night-clubs, restaurants and bars located predominantly in Banjul itself, there are also several troupes of entertainers who put on shows for tourists, usually in one of the clubs or hotels, and finally there are the village festivals arranged for tourists.

As far as the restaurants, bars, and night-clubs are concerned, their clientele are drawn only partly from the tourists, e.g. two of the larger night-clubs more likely to be patronised by tourists both reported that a majority of their patrons were Gambians. An exception to this generalisation is one large night-club which caters almost entirely to tourists, since its main activity is arranging dance displays. The total employment in some dozen establishments in the night club, restaurant and bar category is between 100 and 150 persons according to season.
In addition some night-clubs make contract arrangements with bands on certain nights of the week, and in this way perhaps another 50 persons may find at least part-time employment as night-club musicians. Given the seasonal variation in employment (higher during the tourist season), and the possibility that some of the establishments may have been started mainly in the hope of gaining tourist patronage, it seems reasonable to ascribe at least one-third of the employment directly to the influence of tourism. This implies that tourism has directly created some 50 jobs in these establishments, and so doubt it also is the source of a part of the income of the remainder of those thus employed.

In the case of the entertainment troupes and village festivals, these activities are intended primarily for the tourists. They cannot be described as providing full-time employment for those participating, but they do represent a source of income, and in some cases the sole source of income for those dancers not otherwise employed. Hence in this case it is less meaningful to speak in terms of additional jobs created. Rather tourism may be considered as a supplementary income source, and in the case of the village festivals the receipts can be used by the village to finance community improvements rather than to pay the individual performers.

b) Travel Agencies and Tour Operators

The tour operators are the middlemen of the tourism industry in Gambia. They sell holidays to potential tourists in the markets in Europe, organise their transport to and from Gambia, arrange with the hotels for their accommodation, and offer local tours to the tourists while they are in Gambia. The travel
agencies are basically providers of local transport facilities for the tours sold by the tour operators. These facilities include buses, ships, and one camp located up the river which is used for overnight stops by groups of tourists. In addition the travel agencies also provide transport facilities for the tourists from cruise ships, and organise some of the entertainments arranged for tourists.

The tour operators employ rather few staff in Gambia, and these are almost all non-Gambian tourist guides. Thus the largest operator has between 10 and 14 Scandinavian guides at any time during the season, and 2 Gambians working part-time as guides. Another large operator has 7 Scandinavians and 1 Gambian working as guides. The tour operators claim that they can only employ as guides people who are completely fluent in the Scandinavian languages spoken by the vast majority of the tourists, which they say virtually rules out the employment of Gambians in this capacity.

By contrast the travel agents employ mainly Gambians, their expatriate employment being limited to some management and technical staff, but Gambians are now participating in these capacities too. Total employment in the three main travel agencies concerned with tourists (there are other smaller travel agencies mainly meeting the local demand) is 85 persons, of whom 11 are non-Gambians. In addition the camp in the interior of the country which accommodates tourists overnight while they are on tours employs 26 people, 2 of whom are non-Gambians. Since the major activity of the tourist agencies is the provision of transport, this is reflected in their pattern of employment. The Gambian guides employed are mainly acting as assistants to the expatriates working for tour operators. One of the agencies mentioned the lack of an accountant, but otherwise there
appears to be no special shortage of staff, except for the replacement of expatriates.

In sum, tourism in the Gambia is directly responsible for the creation of at least 150 jobs with tour operators, travel agencies, and kindred activities.

Table 6. Employment in Travel Agencies by Nationality and Occupation

<table>
<thead>
<tr>
<th></th>
<th>Management</th>
<th>Engineers</th>
<th>Drivers</th>
<th>Mechanics</th>
<th>Ships Capt.</th>
<th>Ships Crews</th>
<th>Guides</th>
<th>Security &amp; Maintenance</th>
<th>Clerical</th>
<th>Accounts</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gambian</td>
<td>2</td>
<td>-</td>
<td>24</td>
<td>4</td>
<td>-</td>
<td>11</td>
<td>12</td>
<td>18</td>
<td>3</td>
<td>1</td>
<td>74</td>
</tr>
<tr>
<td>Expatriate</td>
<td>4</td>
<td>2</td>
<td>-</td>
<td>-</td>
<td>2</td>
<td>-</td>
<td>1</td>
<td>-</td>
<td>2</td>
<td>1</td>
<td>11</td>
</tr>
<tr>
<td>Total</td>
<td>6</td>
<td>2</td>
<td>24</td>
<td>4</td>
<td>2</td>
<td>11</td>
<td>13</td>
<td>18</td>
<td>5</td>
<td>1</td>
<td>85</td>
</tr>
</tbody>
</table>

Source: Data provided by the employers.

c) Taxi Services.

As yet Gambia has no public transport system. The only buses in the country are those used by travel agencies and other private operators, which are hired out for specific purposes, e.g. as school buses. To bridge this gap in public facilities a large number of private taxis are in operation. Obviously a major part of the demand for taxis derives from the needs of the local population, both for travel in the area around Banjul, and for longer-distance journeys throughout the country. Equally though there is also a
significant tourist demand for taxis, because the major tourist hotels are all
some way from Banjul and from one another, and also from other local tourist
attractions such as the Abuko Game Reserve.

Table 7. Taxis Operating in Gambia

<table>
<thead>
<tr>
<th></th>
<th>Newly Registered</th>
<th>Licences Renewed</th>
<th>Total Operating</th>
</tr>
</thead>
<tbody>
<tr>
<td>1971</td>
<td>108</td>
<td>546</td>
<td>654</td>
</tr>
<tr>
<td>1972</td>
<td>112</td>
<td>658</td>
<td>770</td>
</tr>
<tr>
<td>1973</td>
<td>158</td>
<td>760</td>
<td>918</td>
</tr>
<tr>
<td>1974 x</td>
<td>47</td>
<td>927</td>
<td>974</td>
</tr>
</tbody>
</table>

x From 1.1.1974 to 21.3.1974 only.

Source: Licensing Office, Police Headquarters, Banjul.

There is no information available on the proportion of taxi custom
which comes from tourists.

An attempt has been made to give special licences to certain taxis to carry
fares tourists at agreed/for given journeys, but it is not clear that such taxis
operate only for the tourists, and it is certainly true that other taxis
also pick up tourists whenever they can, in the hope of being able to charge
higher than normal fares (1).

(1) The operation of this system has also run into difficulties because of
the rapid increase in fuel costs, which invalidates the previously agreed
fares.
Thus there seems to be no way of easily identifying the proportion of taxi operations which is based on tourist demand. All that can be said is that of the 1,000 or so taxi-drivers operating in Gambia (assuming only one driver per taxi, which may itself be an under-estimation), a significant number derive at least part of their income from the tourism industry.

d) Production and Sale of Handicrafts and Souvenirs

It is estimated that during the 1972/73 tourist season, air charter tourists spent approximately 1.25 millions of delasis or U.S. dollars 735,000 on souvenirs (1), making this their second largest item of expenditure after hotel accommodation. To this must be added the expenditure on handicrafts by cruise ship tourists, not to mention local consumption and exports. Hence the production and sale of handicrafts and souvenirs is a significant economic activity, especially when it is further considered that there has as yet been no systematic effort to exploit potential export markets.

The main components of handicraft production for sale to tourists are wood carvings, tie-dyed garments and materials, and jewellery. Other items are produced, e.g. leather goods and pottery, but on a much smaller scale. In addition there are other handicraft products, e.g. woven cloth, which are sold primarily to local customers, who also purchase a proportion of the types of articles made mostly for sale to tourists.

As far as can be ascertained, there has been no systematic attempt by the Gambian authorities to analyse the functioning of this sector of the economy, or even to assess the scale of its operations. Hence the available

---

Data are fragmentary, and essentially limited to the information derived from visits to some of the more important producers and sellers of handicrafts.

A leading goldsmith in Banjul estimated that some 75% of his business was done with tourists. His eight workers were all Senegalese, and this was attributed to the lack of any training facilities in Gambia for this type of skilled work. A producer of tie-dyed materials and garments in Serrekunda employed during the tourist season some 50 workers, mostly women, working in two shifts. Outside the tourist season, only half this number of workers was employed. Most of the production was sold to the handicraft-sellers, who then sell it mainly to tourists, but a very small proportion was being exported directly. There are a number of other smaller producers of tie-dyed articles in and around Banjul, but no estimates of their numbers or employment are available. In Brikama, one entrepreneur was engaged in both wood-carving and cloth-weaving, employing up to ten workers in each trade, the numbers reaching their maximum during the rainy season. Some 70% of the wood-carvings were thought to be bought by tourists, but the woven cloth was mainly for local consumption. Another activity of this entrepreneur was the collection and sale of antiques, presumably again mainly to tourists. According to this entrepreneur there are active in Brikama, which is known as a centre of these trades, some 150 wood-carvers and 200 weavers.

On the sales side, at the Craftsmen's Market and its environs in Banjul there are over a hundred stalls selling handicrafts, some of them employing more than one person. Only some 20 to 30 of these stalls remain open outside the tourist season. In addition, there are several other small locations for sellers of handicrafts close to the major tourist hotels. Thus it seems reasonable to estimate that at least 200 persons are deriving their main income from the sale of handicrafts to tourists during the tourist season.
From the various fragmentary pieces of information referred to above concerning the producers of different types of handicrafts for eventual sale to tourists, some 180 persons can be identified as earning their living from such handicrafts production. Since this information is very incomplete, it may be speculated that a minimum of 300 persons are thus employed (1). This excludes those categories of handicraft producers, such as the weavers, whose output is primarily for the domestic market. Employment in this field appears to be somewhat less seasonal than in most activities pertaining to tourism.

Although there are numerous individuals involved in this activity, there appear to be no formal training arrangements for new entrants, though one of the entrepreneurs interviewed mentioned having a number of trainees. But this appears to be simply a period of learning by doing, without pay but with some provision of food by the entrepreneur.

In general handicraft production and sales, whether for sale to tourists or to the local population, or for direct export, can be considered as one of the least-investigated sectors of economic activity, but in view of its apparent importance as a source of employment and income, this situation badly needs rectification. This point will be discussed in greater detail in the conclusion of the report.

(1) By way of comparison, it may noted that in Fiji, with a population only slightly larger than that of Gambia, it was recently estimated that 3-5,000 women and 4-500 men were engaged part-time in various forms of handicraft production. This implies the possibility that our figures for Gambia may be significantly underestimated. See ILO Report to the Government of Fiji on Handicrafts Marketing Development. Geneva 1973, p.6 (ILO/TAP/Fiji/R.1)
e) The Cultivation and Supply of Foodstuffs for Tourist Consumption

Potentially one of the significant employment-creating effects of tourism derives from its requirements of supplies, in particular foodstuffs and beverages, but also such items as furniture and fittings in hotels. Among the major items of consumption by tourists are meat and fish, eggs, poultry, fruits and vegetables, and a range of beverages. Given the very limited diversification of the Gambian economy, only certain of these products are currently produced locally.

According to the managers of the main tourist hotels, almost all the meat, and all the fish they use are locally produced or caught, the former apparently at the cost of restricting supplies to the local domestic market during the tourist season. The hotels also get some of their eggs from local producers, but many fruits and vegetables are purchased from Senegalese growers, or from abroad. A difficulty here is that the harvesting season in Gambia for products such as tomatoes and green vegetables only partly coincides with the tourist season, the local supplies only beginning to be available in December.

In theory it should be possible to estimate the employment-creating effect of the tourist demand for different locally-produced foodstuffs, given knowledge of (a) the amounts of the different products consumed by the tourists, and (b) the labour-in puts required from growers to produce such an output. Unfortunately very little information is available on either of these points. The hotels know how much they spend on purchase of supplies, but can seldom
give details of the quantities represented by these expenditures (1). Except in the case of onion production, no close study has been made of labour inputs in vegetable production in Gambia.

In this situation, not even a guess as to the employment-creating effects of tourist consumption of locally-produced foodstuffs is possible. Nevertheless a few general observations on the subject can usefully be made. There is some evidence that, following the growth of tourism, increasing numbers of Gambians are turning to the production of different types of vegetables for supply to hotels, e.g. lettuce, tomatoes, potatoes, cabbage. Also the tourist industry has proved a useful source of demand for the existing production of various fruits such as oranges, mangoes, and limes, which perhaps were not previously commercially exploited. In addition other fruits such as strawberries are beginning to be grown to supply the tourist market.

That much more still needs to be done in this direction is illustrated by the frequency with which hoteliers referred to the need to obtain from Senegalese growers products not in sufficient supply locally. Perhaps the Gambian authorities could usefully examine the Senegalese experience, both with a view to increasing the supply of foodstuffs required for the tourist industry, and more importantly for developing an export capability vis-à-vis the European winter market. The problems to be examined are not only the horticultural ones of ensuring a regular supply of high-quality produce, but

(1) In any case a proportion of this expenditure goes on feeding the hotel staffs, and this presumably should be discounted in any calculation, since these people would have purchased food for themselves locally if not working in the hotels.
also the economic and institutional ones of establishing the necessary storage, transport, market and possibly processing facilities. Virtually nothing has yet been done in these latter respects, e.g. there has been a successful drive to promote onion-growing, but no comparable endeavour to arrange storage and marketing facilities.

In the case of other types of products consumed by tourists, the local supply capacity is equally undeveloped. The only beverages produced commercially in Gambia are soft drinks and the influence of tourist demand is reflected by a small seasonal employment increase at the main bottling company's factory. There is discussion as to whether or not Gambia can support a brewery, but in the interim it may be asked whether it would not be cheaper to import beer from neighbouring producers, e.g. Senegal and Sierra Leone, instead of from Europe as is the case at present.

To some extent the hotels have utilised local materials and designs for their fittings, but conceivably much more could be done in this direction, especially if some reasonably attractive furniture could be produced locally.

In general the area of supplies to the tourist industry is one of the least investigated with regard to its potential for employment creation. Since in most cases the goods which can be supplied would represent only a marginal addition over and above the supply generated by local demand, it can be hypothesized that there is more often scope for increasing the incomes of those producers already satisfying domestic demand, rather than for the creation of new enterprises. However, existing enterprises may find a need to take on extra labour to cover the contingencies raised by the satisfaction of the tourist industry's demand.
f) Construction. (1)

The development of a tourist industry generates appreciable requirements for new construction. In the first instance this relates to the building of new hotels and other tourist facilities but in addition (and this is likely to be particularly the case in future in Gambia) significant infrastructural investments may also be required.

Hitherto the development of new hotels has taken place in close proximity to the main commercial and residential areas of Banjul and Kombo St. Mary. This implies that a minimum of additional infrastructure was required in association with the construction of these hotels, since the areas were already generally settled. Further hotel development can only take place in relatively unsettled areas, which will necessitate provision of a full range of infrastructure (roads, water, electricity, telephone, etc.), before hotel building can begin. Since such a scale of investments cannot be economically justified for tourism development alone, they are being conceived as part of a systematic urban development associated with the new tourist areas.

Currently these investment schemes are still in the future. For the moment, as was indicated in Section II (d) above, continuing development of the tourism industry is on a very small scale, only one hotel being under construction in March 1974, and in this case the tempo of building activity appeared to be at a low level (2). Nor do there currently appear to be any

---

(1) On this subject generally, see C.J.B. White, Manpower Aspects of the Gambian Construction Industry, London, FCO/ODA, November 1973

(2) White, op.cit. Table 5, estimates that some 200 workers will be required in the final stages of building this hotel.
infrastructural investments in progress associated within hotel construction. Thus construction employment generated by tourism development is currently at a minimum as compared with recent years, or what is likely in the future if the proposed developments are undertaken. The future employment likely to be generated by hotel construction is discussed in chapter VI of this report.

g) Conclusions about current indirect employment derived from tourism development

From the foregoing sections it is clear that some hundreds of people are gainfully employed as a result of tourism in Gambia, in addition to the direct employment in the hotels. Apart from those people who are wholly employed in activities based on tourism, there are also many others who derive a significant part of their income from tourism, though this may not be their primary source of income, e.g. among the taxi-drivers and those who supply various foodstuffs and other commodities to the hotels. With the information currently available it is not possible to quantify all the indirect employment effects of tourism, but those that have been identified include some 50 workers in restaurants and night-clubs, some 150 employees of tour operators and travel agencies, as many as 500 people engaged in the production and/or sale of handicrafts and souvenirs, and a fluctuating number, currently probably under 50, employed in hotel construction.

The growth of tourism is also responsible for the creation of a number of jobs in the public services. There are 10 people on the staff of the Tourist Office, and another seven working in the Hotel Training Centre (1).

The Gambia Police Force has had 26 men permanently deployed on tourist security duties at the main hotels and beaches during the 1973/74 tourist season. It may also be surmised that the growth of tourism has necessitated increases in staff employed on immigration and customs control.

On another level, no consideration has been given to the multiplier effects on the Gambian economy of consumption expenditures by the more than 2,000 people (the categories mentioned above plus some 1100 working in hotels) employed directly or indirectly as a result of tourism. This in turn must generate substantial incomes for the recipients of these expenditures and also presumably a number of additional jobs, but there is no immediate way of identifying the extent of these effects.
CHAPTER VI

ADDITIONAL EMPLOYMENT LIKELY TO BE GENERATED BY THE FURTHER EXPANSION OF TOURISM

As was mentioned earlier, the expansion of tourism in Gambia has ended its initial phase with the complete utilisation of the most suitable hotel sites in the Banjul and Kombo St. Mary areas. It may now be said to be marking time pending the implementation of the far-reaching schemes for infrastructural investment within the context of the Bafutoto Project. Once this programme of investments is initiated, new hotel construction will also be able to continue on an increasing scale. Thus the immediate prospects of increases in employment resulting from the further development of tourism are limited but after an interval of several years the prospects could become more promising.

a) Additional Employment in Hotels

One new hotel is currently under construction, and another is expected to start construction in July 1974. Beyond this there is a whole programme of new hotel construction to be spread over the ensuing years, but dependent on the implementation of various items of infrastructural investment.

In these circumstances it is possible to establish a forecast of new hotel manpower requirements on the basis of assumptions as to starting dates and length of construction of hotel projects, a coefficient of extra employment per additional bed, and wastage from hotel employment due to occupational change, death, retirement etc. From this it is then possible to work out future hotel staff training needs, given assumptions about the occupational structure of hotel employment, and the rate of wastage during training.
Under the Bafuloto Project a whole series of hotel building projects has been set out, complete with starting dates and construction periods. Unfortunately the timing of their implementation has been postponed by the delays involved in arranging external financing. If this problem can be resolved during 1974, then a revised schedule might look something like that set out in Table 8 below. (In the event that completion of the financial arrangements was further delayed, it would be an easy matter to reschedule this whole table, and arrive at a different timing for future employment creation and training needs.) In Table 8 it is assumed that each additional bed requires 0.6 additional workers, or alternatively that each additional worker will permit the operation of 1.6 additional beds. This is in accordance with our findings as to the current worker/bed ratio in the existing tourist hotels, set out in Chapter IV above. Gambia's experience in this respect seems to be typical of that in other developing countries, where 1-2 extra beds create one new job. (1)

Table 8. New hotel building and employment creation.

<table>
<thead>
<tr>
<th>Site</th>
<th>Starting Date</th>
<th>Construction Time(months)</th>
<th>Finishing Date</th>
<th>Beds</th>
<th>Staff Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Next to Bungalow Beach Hotel</td>
<td>Started</td>
<td>?</td>
<td>December 1974?</td>
<td>225</td>
<td>135</td>
</tr>
<tr>
<td>German-financed project of Kotu</td>
<td>1.7.74</td>
<td>?</td>
<td>1.1.76 ?</td>
<td>340</td>
<td>204</td>
</tr>
<tr>
<td>Kotu Point</td>
<td>1.11.74</td>
<td>14</td>
<td>1.1.76</td>
<td>500</td>
<td>300</td>
</tr>
<tr>
<td>Kotu Beach</td>
<td>1.7.75</td>
<td>16</td>
<td>1.11.76</td>
<td>300</td>
<td>180</td>
</tr>
<tr>
<td>Kotu Point</td>
<td>1.7.75</td>
<td>15</td>
<td>1.10.76</td>
<td>250</td>
<td>150</td>
</tr>
<tr>
<td>Kotu Beach</td>
<td>1.4.76</td>
<td>12</td>
<td>1.4.77</td>
<td>200</td>
<td>120</td>
</tr>
<tr>
<td>Kotu Beach</td>
<td>1.7.76</td>
<td>15</td>
<td>1.10.77</td>
<td>300</td>
<td>180</td>
</tr>
<tr>
<td>Kotu Point</td>
<td>1.1.77</td>
<td>15</td>
<td>1.4.78</td>
<td>250</td>
<td>150</td>
</tr>
<tr>
<td>Kotu Beach</td>
<td>1.7.77</td>
<td>13</td>
<td>1.8.78</td>
<td>200</td>
<td>120</td>
</tr>
<tr>
<td>Kotu Point</td>
<td>1.10.77</td>
<td>15</td>
<td>1.1.79</td>
<td>250</td>
<td>150</td>
</tr>
<tr>
<td>Brufut A</td>
<td>1.4.78</td>
<td>15</td>
<td>1.7.79</td>
<td>300</td>
<td>180</td>
</tr>
<tr>
<td>Kotu Point</td>
<td>1.7.78</td>
<td>15</td>
<td>1.10.79</td>
<td>250</td>
<td>150</td>
</tr>
<tr>
<td>Brufut A</td>
<td>1.6.79</td>
<td>12</td>
<td>1.6.80</td>
<td>200</td>
<td>120</td>
</tr>
<tr>
<td>Brufut A</td>
<td>1.7.79</td>
<td>16</td>
<td>1.11.80</td>
<td>300</td>
<td>180</td>
</tr>
<tr>
<td>Kotu Beach</td>
<td>1.10.79</td>
<td>15</td>
<td>1.1.81</td>
<td>250</td>
<td>150</td>
</tr>
<tr>
<td>Brufut A</td>
<td>1.9.80</td>
<td>13</td>
<td>1.10.81</td>
<td>200</td>
<td>120</td>
</tr>
<tr>
<td>Kotu Beach</td>
<td>1.10.80</td>
<td>15</td>
<td>1.1.82</td>
<td>250</td>
<td>150</td>
</tr>
<tr>
<td>Brufut B</td>
<td>1.1.81</td>
<td>15</td>
<td>1.4.82</td>
<td>300</td>
<td>180</td>
</tr>
</tbody>
</table>

Sources: C.J.B. White, op.cit, App.III, Table 2, p.46., Bafuloto Project.
From Table 8 it can be seen that there will be 2919 new jobs to be filled in hotel employment between 1974 and 1982. Since the ratio of jobs to beds on which this calculation is based is itself an approximation, it may therefore be said as a general guide that some 3,000 additional jobs may be created in hotel employment in the next 8 years, always on the condition that the new hotel building projects do go ahead more or less according to the schedule used in Table 8.

However the tempo of new job creation will not be even throughout the period, as the different hotel projects are of different size and have varying gestation periods. Table 9 shows the numbers of new jobs to be created in each tourist season, if the above schedule of construction is followed.

<table>
<thead>
<tr>
<th>Season</th>
<th>New Jobs</th>
<th>Suggested Starting Dates</th>
</tr>
</thead>
<tbody>
<tr>
<td>1974/75</td>
<td>135</td>
<td>1.1.75</td>
</tr>
<tr>
<td>1975/76</td>
<td>504</td>
<td>1.1.76</td>
</tr>
<tr>
<td>1976/77</td>
<td>450</td>
<td>1.10.76-150, 1.11.76-180, 1.4.77-120</td>
</tr>
<tr>
<td>1977/78</td>
<td>330</td>
<td>1.10.77-180, 1.4.78-150</td>
</tr>
<tr>
<td>1978/79</td>
<td>270</td>
<td>1.10.78-120, 1.1.79-150</td>
</tr>
<tr>
<td>1979/80</td>
<td>330</td>
<td>1.10.79</td>
</tr>
<tr>
<td>1980/81</td>
<td>450</td>
<td>1.10.80-120, 1.11.80-180, 1.1.81-150</td>
</tr>
<tr>
<td>1981/82</td>
<td>450</td>
<td>1.10.81-120, 1.1.82-150, 1.4.82-180</td>
</tr>
</tbody>
</table>

The creation of new hotel jobs on the scale shown in Table 9 implies the need for a considerable training effort. In order to determine the dimensions of this effort a number of other factors must be taken into account. Not all of those who will be employed in the new hotels will require any special training, since some will be working in unskilled jobs, e.g. cleaners, gardeners,
watchmen, kitchen labourers. Similarly, if Gambians are to immediately take
over the management and supervisory positions in the new hotels, they can best
receive some training and experience abroad beforehand.

The training facilities to be provided in Gambia will thus be for
the various types of skilled workers, e.g. waiters and stewards, room-boys and
chambermaids, barmen, junior cooks, receptionists, laundry staff.
This category of skilled workers may be expected to represent some 50% of
those employed in a hotel of the type operating in Gambia. This estimate is
based on the structure of employment in the existing Gambian tourist hotels,
and also on the fact that some 40% of those employed in the Tunisian hotel
industry in 1971 fell into this skilled category. (1) Since the Tunisian
industry has been in existence somewhat longer, it may be expected to be able
to operate with a slightly lower ratio of skilled workers to total employed,
based on the assumption of greater experience among those employed.

However the number of training places to be provided will be more than
50% of the new jobs to be filled, because allowance must also be made for
wastage of those who fail to complete their training successfully, or drop
out part of the way through training. In addition, an increasing allowance must
be made for wastage among the existing stock of those already employed in skilled
jobs in hotels, who leave either to seek different types of work, or because
of natural wastage due to sickness, age, or death, or as a result of promotion
to supervisory positions in the hotels. Making allowances for all of the factors
mentioned in the foregoing paragraphs, we can arrive at estimates of the number
of training places that must be provided for hotel training in successive years.

(1) Erbes, op.cit.p.21
This information is set out in Table 10 below. Again it must be cautioned that these estimates are calculated in relation to a schedule of hotel building.

Table 10. Training in the Gambian Hotel Industry, 1974, 1982

<table>
<thead>
<tr>
<th>Season (1)</th>
<th>1. New Jobs (from Table 9 above)</th>
<th>2. 50% of skilled jobs needing training</th>
<th>3. 5% wastage among trainees</th>
<th>4. 10% wastage among exist. employees in jobs requiring training (2)</th>
<th>5. New Train. Places to be provided (2+3+4)</th>
<th>6. Total Employment in Gamb. Hotels</th>
</tr>
</thead>
<tbody>
<tr>
<td>1974/75</td>
<td>135</td>
<td>68</td>
<td>3</td>
<td>55(3)</td>
<td>126</td>
<td>1.235</td>
</tr>
<tr>
<td>1975/76</td>
<td>504</td>
<td>252</td>
<td>13</td>
<td>62</td>
<td>327</td>
<td>1.739</td>
</tr>
<tr>
<td>1976/77</td>
<td>450</td>
<td>225</td>
<td>11</td>
<td>87</td>
<td>323</td>
<td>2.189</td>
</tr>
<tr>
<td>1977/78</td>
<td>330</td>
<td>165</td>
<td>9</td>
<td>110</td>
<td>284</td>
<td>2.519</td>
</tr>
<tr>
<td>1978/79</td>
<td>270</td>
<td>135</td>
<td>7</td>
<td>126</td>
<td>268</td>
<td>2.789</td>
</tr>
<tr>
<td>1979/80</td>
<td>330</td>
<td>165</td>
<td>9</td>
<td>140</td>
<td>314</td>
<td>3.119</td>
</tr>
<tr>
<td>1980/81</td>
<td>450</td>
<td>225</td>
<td>11</td>
<td>156</td>
<td>392</td>
<td>3.569</td>
</tr>
<tr>
<td>1981/82</td>
<td>450</td>
<td>225</td>
<td>11</td>
<td>179</td>
<td>415</td>
<td>4.019</td>
</tr>
</tbody>
</table>

(1) Assuming that training periods of 3 to 6 months before beginning work are desirable, the actual starting dates of training courses during each season can be related to the scheduled opening dates of new hotels when these are finalised. No attempt has been made at this stage to subdivide the training places provided among different courses, e.g. restaurant and bar, front office, etc. Detailed planning at this level can best be carried out in close co-operation with the industry as the characteristics of each project are known.

(2) i.e. 10% of the 50% of hotel workers assumed to be in skilled jobs requiring training, or in other words 5% of the cumulative total of hotel employment in successive seasons.

(3) i.e. 5% of the approximately 1100 employees in hotels during the 1973/74 tourist season.
which is not yet certain. Thus the timing of training may well have to be changed but the principles on which the calculations are made will not alter, so that the relevant adjustments should not be difficult to make.

In preparing this type of forecast of training requirements there is an implicit assumption that an initial period of formal training is a desirable prerequisite for future workers in those types of hotel work designated as skilled. But the graduate of such a training course is not immediately a fully qualified worker able to function independently. It can be assumed that he still requires one or even two seasons working under close supervision to become fully experienced.

A quantitatively less significant training effort, but one which is equally vital for the successful development of new hotels in Gambia, is necessary for the supervisory and managerial levels of hotel employment. At these levels the current supply of qualified Gambians is very limited, and in order to be fully efficient a much greater element of experience is involved so that it must necessarily take some time to expand the supply from local sources. It may be assumed that some 10% of the employment in a tourist hotel is in the supervisory and managerial categories (1), with some tendency for the percentage to be reduced slightly in smaller hotels, due to less subdivision of tasks, the smaller numbers of staff to be supervised, and the lesser weight of administration.

Applying this 10% ratio to the employment created by new hotel developments and taking into account existing hotel employment, Table II gives estimates of the requirements for new supervisory and managerial staff in successive seasons, together with the cumulative total of employment in these categories.

(1) This is the situation in the existing Gambian tourist hotels, and data for other countries are similar.
Table 11 - Employment of managerial and supervisory staffs in Gambian hotels

<table>
<thead>
<tr>
<th>Seasons</th>
<th>New Requirements</th>
<th>Total Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>1973/74</td>
<td>110</td>
<td></td>
</tr>
<tr>
<td>1974/75</td>
<td>123</td>
<td></td>
</tr>
<tr>
<td>1975/76</td>
<td>173</td>
<td></td>
</tr>
<tr>
<td>1976/77</td>
<td>218</td>
<td></td>
</tr>
<tr>
<td>1977/78</td>
<td>251</td>
<td></td>
</tr>
<tr>
<td>1978/79</td>
<td>278</td>
<td></td>
</tr>
<tr>
<td>1979/80</td>
<td>311</td>
<td></td>
</tr>
<tr>
<td>1980/81</td>
<td>356</td>
<td></td>
</tr>
<tr>
<td>1981/82</td>
<td>401</td>
<td></td>
</tr>
</tbody>
</table>

According to the Tourist Office, there were in December 1973 64 expatriates working in Gambian hotels, but only 7 Gambians training abroad. It seems clear that, if the necessarily high standards required for supervisory and managerial staff are to be maintained, and at the same time the employment of Gambians in these capacities is to be increased, there must be both a continuing reliance on expatriates to fill a significant proportion of the new posts, at least initially, and also a greatly increased training programme for Gambians at these levels. These questions are discussed in more detail in the next chapter on Gambianisation and training.
In concluding this discussion of future employment to be generated by new hotels, it can be said that some 3000 new jobs may be created up to 1982, requiring a substantial training programme for skilled hotel workers, and a much increased emphasis on managerial and supervisory level training for Gambians. Again, all this presupposes that the proposed schedule of new hotel-building is adhered to. If it is not, but is nevertheless implemented eventually, the scope of the above proposals will remain unchanged, but their suggested timing will have to be altered.

b) Additional Employment in Activities Dependent on Tourism

It is much more difficult to produce any definite information about the future employment in activities dependent on tourism, precisely because they are dependent activities. Therefore anything that can be said is conditional also on the building of new hotels permitting increases in the numbers of tourists, and on the timing of such developments. A further difficulty derives from the lack of knowledge about current employment in some of the activities dependent on tourism. Thus much of what is said below can be accepted only with considerable reservations, which have been expressed wherever possible. Future employment in dependent activities is discussed in the order that they were considered in chapter V above.

i) Restaurants Night-Clubs and Places of Entertainment

It is already true that many of the existing restaurants, night-clubs and similar entertainments do not obtain much custom from tourists, and this is most likely because of their distance from most of the tourist hotels, and perhaps the quality of their facilities. The former factor will be further
reinforced as new hotels are built, because these will be even further away from the currently available places of entertainment which are mostly in Banjul itself. Therefore it seems unreasonable to expect any significant increases in employment in the existing restaurants, night-clubs, etc., as a result of the hoped-for expansion of new hotels. A second possibility is that new restaurants and night-clubs will grow up in the new tourist areas. This may be expected to happen because of the likelihood that a significant proportion of tourists will wish to seek some of their entertainment outside their own and similar hotels. Indeed the net effect of such developments may be negative for some of the existing establishments, because a proportion of their local clientele might transfer their custom to the newer establishments.

Attempting to put any precise figure on future growth of employment in places of entertainment dependent on tourism appears very difficult, given the dependence of such employment on the growth of new hotels which may or may not have night-clubs of their own. One large existing night-club and restaurant which primarily serves tourists employs some 30 people. If we assume that a similar establishment could be expected to open in the Kotu area as it develops, and another in the Brufut area, together with a few smaller establishments offering simpler amenities and catering partly to the local clientele, then it can be expected that up to 100 extra jobs may be created in places of entertainment outside the hotels as a result of tourism growth during the next decade. This is obviously a very hypothetical figure, and the timing of the creation of any such new jobs cannot be forecast at this stage.

ii) Travel Agencies and Tour Operators.

Future growth of employment under this heading will depend in large measure on the numbers of tourists coming to Gambia in future years. An upper
limit for the future numbers of air charter tourists may be established by reference to the completion dates and capacities of new hotels. Assuming that each additional bed will serve 12 additional tourists each season, and using the schedule of completion of new hotels shown in Table 8 above, the numbers of air charter tourists coming to Gambia could be as high as shown in Table 12 below (2).

Table 12. Maximum Numbers of Air Charter Tourists Visiting Gambia in the Future.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourists</td>
<td>20,400</td>
<td>23,600</td>
<td>29,800</td>
<td>39,800</td>
<td>45,800</td>
<td>54,400</td>
<td>62,000</td>
<td>69,400</td>
<td>75,400</td>
</tr>
</tbody>
</table>

x) Estimate based on figures to 30 April 1974.

Certainly if the existing and proposed new hotels are to operate profitably in the coming seasons it is desirable that figures for tourist arrivals by air charter approximating to those in Table 12 should be achieved.

(1) See Chapter III (d) above, for discussion of this assumption.

(2) Tourists coming by ship or overland are ignored in this discussion, because their impact on the demand for tourist services is insignificant compared to that of the air charter tourists.
The major activities of both tour operators and travel agencies in Gambia are the sale and operation of one-and two-day tours to various destinations in Gambia and Senegal. In general, the tour operators employ the guides, while the travel agencies employ the other categories of workers involved in the provision of tours, e.g. drivers, mechanics, engineers, as well as some guides. The numbers of tourists and the numbers of tours sold to them may be compared in Table 13.

Table 13 - Tours Taken by Air Charter Tourists

<table>
<thead>
<tr>
<th>Season</th>
<th>1971/72</th>
<th>1972/73</th>
<th>1973/74</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourists</td>
<td>8,031</td>
<td>15,584</td>
<td>20,400 x</td>
</tr>
<tr>
<td>1-Day Tours</td>
<td>14,791</td>
<td>21,426</td>
<td>39,184</td>
</tr>
<tr>
<td>2-Day Tours</td>
<td>3,569</td>
<td>4,658</td>
<td>5,362</td>
</tr>
</tbody>
</table>

x Estimate based on figures to 30 April 1974.


From Table 13 it can be observed that during the 1973/74 season almost every air-charter tourist took two one-day tours, and every fourth tourist also took a two-day tour.

The data in Table 13 are not sufficient to establish a clear pattern between the numbers of tourists and tours taken, though it is noticeable that one-day tours are increasing faster than two-day tours. But if the projected increase in numbers of tourists comes anywhere near fruition, a very substantial increase in the demand for tours must be anticipated. At the current rates of demand, by the 1981-82 season there might be a requirement for as many as 150,000 one-day tours and 15-20,000 two-day tours.
The great majority of tours operated in Gambia use motor-coaches as the means of transport, each one requiring a driver and one or two guides while running, and of course some maintenance and security staff while at the garage.

Even if somewhat larger and more modern coaches then those presently in use are introduced, it is hard to believe that the suggested increase in demand for tours can be satisfied without something like a doubling of the number of coaches currently in operation (this would also imply a significantly higher rate of utilisation of coaches then has been achieved hitherto). Since drivers, guides and maintenance staff make up the largest categories of staff currently employed by tour operators and travel agencies, there will need to be at least commensurate increases in their employment too. (If the utilisation rate of coaches is significantly increased, it may begin to be necessary to provide more than one crew per coach).

Another consideration is that if additional tour operators are to be attracted into marketing holidays in Gambia, which it was suggested in Chapter III, will be necessary if more diversified sources of tourists are to be tapped, they will also find it necessary to employ their own guides. Thus a reasonable expectation would be that the numbers employed in the tour operation and travel agency sector are likely to double from 150 to 300 by the 1981/82 season, and most of this increase will be in respect of coach drivers and tourist guides, with limited additional requirements in such activities as vehicle maintenance, management, and office staff. The orders of magnitude of the needs in the main occupations might be an extra 40 drivers and 80 tourist guides, but the precise timing of these needs cannot yet be foreseen.

If there were also to be an expansion in the numbers of fishing or river tours sufficient to need the services of additional vessels, then there...
would of course also be a need for additional ships' crews, but it is not possible at the moment to make any judgements about the timing or extent of such a demand, though it is unlikely to be large.

iii) Taxi Services

There are at present approximately 1000 taxis licenced to operate in Gambia, this large number being due to the absence of public transport. If a public transport system is started, as is now being discussed, then a significant proportion of existing taxis will lose their business. Thus although an expanding number of tourists would be a source of increasing taxi business, the loss of business due to the introduction of public transport would counteract this. The safest assumption in the future would therefore appear to be that there will be no overall increase in the requirements for taxi-drivers as a result of the continuing expansion of tourism. Rather the existing taxis will obtain an increasing proportion of their custom from the growth of tourism.

iv) Production and Sale of Handicrafts and Souvenirs.

An expansion in the numbers of tourists visiting Gambia on anything approaching the scale suggested in Table 12 above must imply a substantial increase in tourist demand for handicrafts and souvenirs. As was pointed out in Chapter V(d) above, expenditure by tourists on these items represents one of their most important outlays while in Gambia. Unfortunately the lack of information about current employment in this sector, particularly on the production side, makes it impossible to give any meaningful estimate of future employment likely to be created by the further expansion of tourism.

At this point we can only reiterate the need for a detailed study of the current nature and extent of handicraft sales and production activities as a prerequisite for evaluating their scope for expansion.
This is particularly important because there is some evidence that this is one area of employment dependent on tourism which is less seasonal in nature, and hence offers possibilities of continuous income.

On the sales side it may be suggested that each of the new tourist areas (Kotu, Brufut, etc.) will require the establishment of a main scales point similar to the Craftsmen's Market in Banjul, and perhaps smaller marketing points in the vicinity of each group of hotels. On this basis, and in relation to the current estimate of 200 people deriving their income from sales of handicrafts, perhaps 100 additional such jobs might be created in the Kotu area by 1979 and a similar number later in Brufut. Against this must be kept in mind the possibility that some of the existing sellers in Banjul might choose to transfer their place of activity to one of the new areas in the hope of a better market, thus limiting the net increase in employment.

v) The Cultivation and Supply of Foodstuffs for Tourist Consumption

As with handicrafts, food production is another sector about which there is very little current information. It is clear that a substantial increase in the number of tourists will commensurately increase the demand for various types of supplies consumed by tourists, but it is not clear that this demand will be able to be met from domestic sources.

The supply of fish can probably be expanded to meet foreseeable requirements, but it is already apparently difficult to satisfy both the tourist and domestic demands for meat from Gambian sources. In the case of fruits and vegetables, expansion of production has already taken place in response to tourist demand, and this may presumably continue, though whether to the extent of obviating the need for imports is doubtful, given...
the different timings of the tourist season and the production season.

Hence there is clearly likely to be an increase in domestic suppliers' incomes, and importers' incomes also, as a result of the prospective growth of tourism, and this may also create extra jobs too. But as with the handicraft sector, no meaningful estimation of the extent of such influences can be made with the current lack of knowledge. Again there needs to be a detailed study of the nature and extent of these types of supply activities, for both domestic and tourist consumption, as a prerequisite for estimating their future development prospects.

vi) Construction

The further development of tourism is wholly dependent on the building of new hotels, and this presupposes a significant employment of construction workers. Estimates of the labour inputs required for this purpose are already available. (1) According to these estimates a construction labour force of between approximately 250 and 800 men will be required at different periods between 1973 and 1980 for the building of new hotels. The numbers will fluctuate in accordance with the scheduling of different projects, and seasonal peaks and troughs in construction activity due to weather conditions and the influence of competing labour demands. The initiation of this programme of new construction is already delayed by at least a year, so the suggested pattern of employment could become valid until 1981 at least.

At least 50% of the labour required for hotel construction is expected to be unskilled, and between 15 and 45 supervisors and foremen will be required in proportion to the anticipated employment.

(1) See White, op.cit. especially pp. 12-15 and Appendix VI.
Among the skilled workers the largest category is masons, for which demand is expected to fluctuate between 60 and nearly 200. From 20 to 70 carpenters are expected to be required at different times, and smaller numbers of other skilled workers (electricians, plumbers, etc.)

It is expected that, if the different hotel building projects take place in the intended sequence, then the demand for construction manpower will change slowly from quarter to quarter, with no undue bunching at any particular time, and permitting an appreciable continuity of employment for a significant proportion of the workers. But this supposition takes no account of competing demands for construction workers.

Two such may immediately be identified. Firstly, the precondition for new hotel construction is new infrastructural investment in the new tourist areas. No analysis of the labour inputs this will require has been made, though if a similar phasing of activity to that proposed for hotel building is followed, it will not be too large. Also such activities as road-making, cable-laying etc. will not compete so directly with hotel-building for workers except at the unskilled and supervisory levels. At the unskilled level there should be no scarcity provided wages are competitive, but it is likely that there will be difficulty in finding sufficient numbers of supervisors and foremen. In this respect the relevant recommendation of the White Report (1), that PWD facilities for supervisory training be made available to the private sector also, seems the most sensible course to follow. There may be less competition for skilled workers between hotel and infrastructural investment, because to an appreciable extent different skills are required. Those expected to be most in demand for hotel-building have already been mentioned, but in the case of infrastructural investment the skills most likely to be needed are those of various types of plant operators, and perhaps wiremen.

(1) White, op.cit. p.31.
The second potential source of competition for hotel construction workers could come from within the industry itself, as a result of the need which will soon begin to appear for refurbishing and remodelling some of the existing hotels. After a few years of intensive tourist occupation, hotels will be in need of extensive repainting and repair, and no doubt managements will at the same time wish to reconstruct or upgrade some of their facilities. Although the tourist hotels keep a few maintenance staff of their own, these people are occupied with routine repairs.

Such comprehensive refits and modernisations will necessarily have to be undertaken outside the tourist season and will require substantial labour inputs, involving the same skills as those required in hotel construction. It is therefore unfortunate that most of the peak periods of demand for hotel construction workers, as forecast by White (1), also fall outside the tourist season. Thus a possibility of periodic shortages of some types of skilled workers must be anticipated, not immediately but perhaps in three or four years as some existing hotels find it necessary to undertake extensive refits, both for the reasons mentioned above and also as a means of maintaining their competitive position with the newer hotels then coming into operation.

In sum therefore, new hotel construction is expected to occupy a fluctuating number of workers, ranging from 250 to 800, for the foreseeable future, and there is also a growing likelihood of the need for a significant additional labour force for the refitting and modernisation of existing hotels outside the tourist seasons. The additional labour required for infrastructural investment in the tourist areas is not considered as a demand generated by tourism, since these investments are expected to be undertaken for general development purposes, and tourism will only be one, albeit a major one, of their beneficiaries.

(1) White, op.cit. Tables 5 and 6.
A number of expatriates are working in the tourist industry in Gambia, and also in some of the activities dependent on tourism. They are found primarily in management and supervisory positions in the hotels, managing tour and travel agencies and working as tourist guides, and to a limited extent operating places of entertainment. The expatriate interest in the construction industry is not considered here since this is largely independent of tourism.

a) Hotel Managers and Supervisors

There are between 60 and 70 expatriates currently working in the hotels, which suggests that some two-thirds of the managerial and supervisory staff are foreigners. Against this, at the end of 1973 only 7 Gambians were undergoing hotel management training abroad. Furthermore, as was shown in Table 11 above some 300 new jobs for managerial and supervisory staff may be created as a result of the hotel-building programme.

Given these factors, what are the expectations that Gambianisation at these levels can be extended significantly in future years? A first point to consider is that the tourist industry is international, both in the nature of its business, and in its structure. Many of the hotels in Gambia are foreign-owned, as is the case in most other countries too. Also it is common all over the world for posts such as those of hotel manager and head chef to be filled by foreigners, in particular nationals of those European countries which have a long tradition as tourist destinations, or from which there is a great tourist outflow.

These people have the advantage of long experience of tourism, an indispensable quality for senior hotel staff, and also are likely to be more familiar with
the countries from which the tourists come, and hence the nature of their expectations. Thus it is suggested that it is not necessarily the best policy for Gambia to aim at total indigenisation of top-level hotel staff. A far greater degree of indigenisation than at present is certainly desirable, and it is necessary to see how much progress in this direction can reasonably be expected.

An average of 35 to 40 new managerial and supervisory posts in hotels should be created per annum up to 1982 if the hotel-building programme goes ahead as planned.

In addition it must be assumed that there will be some wastage among existing hotel managerial and supervisory staff, though the numerical implication of this will be small.

The necessity of both training and job experience before appointment to such posts implies that recruits for these positions must be identified several years beforehand. The stock of Gambians with the necessary education is small during the 1973/74 academic year there are some 40 sixth-formers and 428 in the upper and lower fifth forms (1), and these figures are not significantly different from preceding years. From this pool must be satisfied the high-level manpower needs of the public service, education and the private sector generally.

Taking into consideration the desirability of an education to at least GCE standard as a pre-requisite for high-level hotel work, and the generally rather poor examination results of recent years (2), it must be doubted whether Gambia will be able in the near future to find adequate numbers of qualified school-leavers willing to enter hotel work at this level. (It must be borne in mind that hotel work may appear a less attractive alternative to the better-educated

---

(1) Gambia, Education Statistics 1973/74, Banjul, December 1973, Table 3 G
(2) Ibid, Tables 7D, 7E, 7F.
school-leavers than a public service career or teaching, due e.g. to the seasonal nature of the work, and its relative novelty in Gambia.) The implication is that there will be a significant continuing requirement for expatriate managerial and supervisory staff, even if there is a substantially increased and successful effort at recruiting more Gambians.

The means to be followed in training Gambians as future managers and supervisors include on-the-job training in Gambian hotels, formal training courses abroad, and experience in hotels abroad. Some elements of all these forms of training are desirable.

On-the-job training in Gambia is a desirable first stage of training as it permits the management or supervisory trainee to familiarise himself with his future working milieu, and also gives him a knowledge of the work of his future subordinates, the practice of which must form a part of such training. Formal training in an institution abroad is the next stop, to provide the theoretical background and knowledge for the trainee's future work. It is not suggested that Gambia should attempt to establish its own training facilities at this level, because (a) the potential demand is too small to permit their economic operation, and (b) the undoubted advantages of international experience would thereby be lost. The final stage of training is to work in hotels abroad, combining on-th-job training with the gaining of experience. Already some of the hotel companies operating in Gambia make use of the fact that Gambia's tourist season does not overlap that of the Mediterranean area to rotate some of their top staff between their hotels in the two areas, thus providing continuity of employment and variety of experience. Government should encourage all hotel operators to follow this practice in training their Gambian managers and supervisors wherever possible. Another useful procedure would be to send such
Gambians for short periods of experience in hotels in the countries from which
most of the tourists coming to Gambia originate. This can facilitate their
understanding of the needs of their future clientele, and where no direct
commercial links between hotels in the two countries exist it might be arranged
under government auspices.

b) Tourist guides

One of the highest concentrations of expatriate employment is among the
tourist guides employed by the tour operators. The operators defend this
position by arguing that only nationals of the countries from which the tourists
come have an adequate command of the tourists' mother tongues and hence can be
satisfactory guides. It is true that tourists require a guide who speaks their
language fluently, and that few if any Gambians are yet in this position with
regard to the Scandinavian languages for which the current demand is highest,
though many Gambians have by now picked up a limited knowledge of Swedish. But
for the tour operators there is another advantage in using Scandinavian guides,
since during the Gambian slack season they can use these guides at some of
the other tourist destinations to which they operate, e.g. in the Mediterranean.

There seems no reason why, with sufficient training, Gambians should not
become proficient in a variety of European languages, and hence able to work
effectively as tourist guides. The necessity is for a thorough grounding in one
of the languages used by tourists, preferably in the country where it is spoken,
together with voice and speech training, and study of the country whose
language is being learnt. On return to Gambia it is also desirable that
trainee guides should further develop their own knowledge of their country and
its customs and culture. The prerequisite for such a training will again be at
least successful completion of secondary education, another call on the limited
pool of educated Gambians. To replace the existing expatriates and cater to the needs of an expanding number of tourists drawn from a wider variety of countries as set out in Chapter VI Section (b) (ii) above, up to 100 Gambian tourist guides are likely to be necessary by 1982. In the light of estimates of the numbers of tourists expected to come from different sources in the future the Gambian authorities may attempt to arrange for scholarships for language studies by Gambians to be granted in each of these countries to the extent necessary.

c) Restaurant and Night Club Operators

Several of the more important restaurants and night-clubs are operated by expatriates, and Gambians in competing establishments feel handicapped by their own lack of business expertise, and also claim that the authorities do nothing to help them develop their (indigenous) enterprises. Whether or not there is any truth in the latter claim is outside the concern of this report, but it would in general be a useful step to initiate courses of elementary business training to facilitate the rise of small-scale indigenous entrepreneurs, both in the tourism sector and in other sectors of the economy. The Gambia Commercial and Development Bank might also be asked to assist further in the financing of indigenous small-scale enterprises, once it was satisfied with the abilities of the intending entrepreneurs.

d) Training for skilled hotel workers

Extensive reference to this subject has been made above in Chapter VI, Section (a). The problem is not one of replacing expatriates but of creating a sufficient number of skilled Gambian workers to meet the demands of an expanding tourist industry.
As was suggested above (Table 10), nearly 2500 new training places will need to be provided in the period up to 1981/82 if the anticipated staffing needs of new hotels and replacement needs in existing hotels are to be fully met with regard to skilled workers. The types of staff included in this context are waiters, barmen, receptionists, junior cooks, and room-boys and chambermaids. The length and content of the training to be given can best be decided in consultations between the authorities and representatives of the tourist industry. They should also decide the numbers to be trained in each occupation. There will probably be a concentration of training during the May-September period, i.e. outside the tourist season, when there is the possibility that trainees can do some of their practical training in unused hotels. Given the likely scale of the training effort needed, an interesting possibility would be the establishment of a demonstration hotel attached to the training institution (1).

The proposed scale of development of the tourist industry, and the consequent training need justifies the establishment of a permanent training facility for skilled workers. Given the scarcity of suitably qualified Gambians, and the competing demands for their services, it is likely that initially at least the majority of the training staff will be non-Gambians.

Considering the relatively low educational qualifications, probably at best an incomplete secondary education, with which Gambian entrants to skilled hotel work may be expected to be equipped, the provision of at least basic training before starting work will be desirable.

Beyond this a combination of work under close supervision, essentially a form of on the job training, and some further formal training, will probably be considered necessary for the production of a skilled worker able to work without constant close supervision.

e) Other Hotel Workers

It is assumed that for the unskilled categories of hotel workers, e.g. kitchen labourers, cleaners, gardeners, watchmen, no special training is necessary. The hotels themselves can arrange that such workers are initially under close supervision.

Another small category of workers not hitherto mentioned are those carrying out maintenance work in the hotels, e.g. carpenters, plumbers, electricians, etc. Their numbers are small, and their work will not be dissimilar from what it would be in any other type of establishment, so that it is not thought they would require any special training in the context of the tourist industry. Rather their training should be considered as part of the training effort for the provision of skilled tradesmen.
a) Conclusions

The hitherto rapid growth of air charter package tourism (1) in Gambia may be expected to slow down during the next two seasons, basically because of the slowing-down in new hotel-building, but perhaps also due to rising costs of holidays and the limited progress so far made in seeking new sources of tourists. These latter factors would be reflected in declining rates of occupancy in the existing hotels.

Rapid further growth of the industry after say the 1975/76 season will depend in the first instance on the progress made in infrastructural investment programmes in the areas earmarked for further tourist development, and subsequently on the success in attracting investors to build new hotels in these areas once they have been opened up. Contributory factors in this process will be the success in minimising the tendency to rising costs implicit in a context of rising world prices, and the exploitation of additional sources of tourists, over 90% of whom currently come from the Scandinavian countries.

If the hotel-building programme which has been proposed in the context of the Bafuloto Project takes place without any further delays, then the numbers of air-charter tourists coming to Gambia could rise to 40,000 in the 1976/77

(1) Tourists arriving on cruise ships and overland are not considered further here, since as mentioned in the body of the report they form an insignificant part of the total, and have a minimal impact on employment generation.
season, over 60,000 in 1979/80, and 75,000 in 1981/82. These are maximum figures, the extent to which they are realised will depend on the progress made in increasing sales of holidays to tourists.

Currently the hotels in Gambia employ some 1100 persons, of whom 10% are managerial and supervisory staff (about two-thirds expatriate), 50% are skilled workers (barmen, waiters, cooks, receptionists, room-boys, etc.), and the other 40% unskilled (kitchen labour, cleaners, watchmen, gardeners etc.). The majority of these workers are laid off for several months outside the tourist season. Training hitherto has been mainly of the in-service variety. Few vacancies are reported, the shortcomings of the current labour force being qualitative rather than quantitative.

The growth of tourism has had employment-creating effects in a number of activities outside the hotels. These effects have taken the form of creation of extra jobs, and also of creating additional income for those providing products and services sought by tourists. Among the jobs whose creation may be ascribed to tourism are some 50 in places of entertainment, 150 with tour operators and travel agencies, perhaps 500 in the production and sale of handicrafts and souvenirs, up to 50 jobs in the public sector, and 50 in construction, though this latter figure is currently at its lowest point.

In addition tourist demand provides a significant part of the income of the 1000-add taxis now operating in Gambia, and of the local producers of various foodstuffs consumed by tourists.

Tourism may also have been responsible for the creation of extra employment in these latter directions, but the extent of any such effect cannot readily be identified.

The future expansion of employment in the hotels and in activities based on tourism is dependent on new hotel-building, which in turn will require extensive infrastructural investment in the areas to be developed for tourism.
If these developments take place as scheduled then almost 3000 new jobs will be created in hotels between 1974 and 1982 (Table 8.). The structure of this employment is expected to be similar to that in the existing tourist hotels. The creation of these jobs will not take place at an even pace throughout the period, but will be related to the completion dates of the various new hotels (Table 9). Assuming a similar structure of employment to that in the existing tourist hotels, and making allowance for wastage among the existing hotel labour force for various reasons, it can be estimated that Gambia will need to provide almost 2500 new training places for skilled hotel workers during the 1974-82 period. The number of these places to be provided each season will vary according to the imminent completion of new hotels (Table 10).

There will also be a requirement over the same period to train new managerial and supervisory staff for the hotels, generally to be carried out abroad. Some 300 such new staff will be required (Table 11), but it is to be doubted whether Gambia has sufficient reserves of well-educated recruits to the labour force to be able to fill all these positions, implying the continuing existence of an expatriate element in hotel employment at this level.

Estimates of future employment creation in activities dependent on tourism are necessarily more hypothetical. There might be up to 100 new jobs in places of entertainment as a result of the further expansion of tourism up to 1982, some 150 extra jobs with travel agencies and tour operators, 100 additional jobs in handicraft-selling, and currently unidentifiable increases in employment among handicraft producers and the producers and suppliers of foodstuffs etc., to the hotels. Finally hotel construction should require between 250 and 800 construction workers at different times, and there will begin to be a significant further need for such workers for the refitting and modernisation of existing hotels.
The training implications of the expansion of tourism, taking into account the desirability of "Gambianising" the industry as far as possible, are as follows. (1) At the managerial and supervisory level in hotels there are 60-70 expatriates to be replaced, 300 new jobs to be filled up to 1982, and a small additional allowance to be made for wastage, implying a need to train up to 400 Gambians at this level, preferably overseas. It is doubtful whether Gambia can find this many qualified trainees, taking into account the need to satisfy other high-level manpower requirements, so that an element of continuing expatriate employment is likely. Nevertheless Government should seek to stimulate as far as possible the training abroad of Gambians for this type of employment, in conjunction with the hotel industry. (ii) Intensive training abroad in languages should be provided for up to 100 Gambians up to 1982 who can then become competent tourist guides. This training programme will compete with that for hotel managerial and supervisory staff for qualified Gambian entrants. (iii) The government could usefully provide training and if possible credit facilities for small-scale indigenous entrepreneurs, to facilitate their entry into the tourism industry as well as other sectors of the economy. (iv) The scale of the proposed training programme for skilled hotel workers (up to 2500 training places 1974-82), implies the need to establish a training facility for this purpose, probably to be staffed mainly by expatriates. A demonstration hotel could usefully be established in conjunction with this enterprise. Both basic and refresher training courses will be needed, for such categories as waiters, barmen, cooks, receptionists and room-boys.

b) Recommendations

1. As soon as possible, the Government should begin the infrastructural investments proposed within the context of the Bafuloto Project, and seek investors willing to construct hotels on the new sites thereby opened up.
2. Efforts should begin immediately to seek new sources of tourists in Europe. This might be done through Tourist Office officials, perhaps attached to Gambian diplomatic missions in Europe, or by hiring the services of a publicity and tourist agency, or both.

3. a) An institution to carry out the training of skilled hotel workers should be established. Details of the suggested scale and nature of this enterprise are contained in the body of this report.

   b) Arrangements should be made for the training abroad of potential Gambian managerial and supervisory staff for the hotels, to the extent that qualified trainees can be found.

   c) Training arrangements abroad are also needed for tourist guides, mainly for the study of European languages.

   d) Training in business practices, and if possible some credit facilities, should be provided for indigenous entrepreneurs wishing to enter the tourism industry.

4. A detailed study should be made of the handicrafts sector - its extent and organisation for production and sales, both to tourists and Gambians, its export possibilities, and its training needs and financial requirements. From the findings of such a study, Government can decide what measures it may take to assist the further development of the sector.

5. A survey of food production (other than staples) is highly desirable as a prerequisite for measures aimed at reducing the import of food for tourist consumption, and stimulating production for local consumption and export. The areas of special interest in this respect are fruits, vegetables, potatoes, meat, poultry and eggs.
6. More modern and more comfortable tourist buses are needed as an added stimulant to tourists to take local excursions while in Gambia.

7. A museum showing both the history and everyday life of Gambia would be a useful tourist attraction, as well as an educational facility for young Gambians.