TOURISM ESTABLISHMENT SURVEY REPORT

(2018)

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List of Abbreviation and Acronyms

GT Board	Gambia Tourism Board
GVA	Gross Value Added
SNA	System of National Accounts
TES	Tourism Establishment Survey
TSA	Tourism Satellite Account
UNDP	United Nations Development Programme
UNWTO	United Nations World Tourism Organization

Foreword

Measuring the economic contribution of Tourism in a country can be ambitious, as it is difficult to capture all the contributions of Tourism to an economy due to the cross cutting nature of the sector. This report presents the results of the 2018 Tourism Establishment Survey (TES) which will complement efforts towards the measuring of the contribution of Tourism in the country. It will also improve the availability of Tourism Statistics in The Gambia. The survey was conducted by the Gambia Bureau of Statistics (GBoS) in collaboration with the Gambia Tourism Board (GT Board).

The report mainly consist of data on revenue, expenditure, duration of operation, employment, gross operating profit as a percentage of turnover of specific Tourism sub-sectors, namely, accommodation, food, beverage and entertainment, transport operators, casinos and gaming centers, equipment hirers, retail shops/services and small tourism establishments such as tour guides, tourist taxi drivers, tourist attractions and bird watchers.

The Gambia Bureau of Statistics wishes to express its profound gratitude to United Nations Development Programme (UNDP) country office through the Project Implementation Unit (PCU) of the Ministry of Finance and Economic Affairs for providing funding to conduct the survey. We would also like to thank the United Nations World Tourism Organization (UNWTO), the consultant David McEwen for their support to conduct the survey.

We would also like to extend our heartfelt gratitude to the entire staff of the Bureau, the supervisors, and enumerators for their participation in the survey. We would also like to thank all the respondents who participated in the survey.

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Statistician General

Concepts and definition

Establishment: An establishment is defined as an enterprise or a unit of production that engages in one kind or one main kind of economic activity within a geographical location.

Food, Beverage and Entertainment: These include establishments that engage in the provision of food, drinks, beverages and entertainment for tourist outside of the main accommodation of the tourist.

Ground Tour Operator: The Ground Tour Operator is a firm or an individual who organizes tour of the tourists when they arrive in the destination. Usually the Ground Tour Operators have their own local transport system in the form of buses, trucks etc.

Gross Value Added: This is the difference between the values of goods and services produced (output) and the value of the intermediate goods and services (input) consumed in the course of production.

Tourist: A Tourist is a non- resident visitor who comes to the country for a pleasure trip, holidays, business, family affairs, mission, meetings, religious and any other purposes except those for which there is remuneration from within the country and stays at least for one night and not more than 365 nights in an accommodation in the country.

Tour Operator: This is an enterprise which offers package tours abroad.

Tourism: Can be described as the activities of a person travelling to and from his/her usual destination for not more than one year for either leisure, pleasure or other purposes.

Tourist Accommodation: A facility that regularly or occasionally provides overnight accommodation for tourists. It is divided into collective tourist establishments and private tourist accommodation.

Tourism Characteristic Sub-Industry: The sub specific industries under Tourism that provide service or products to tourists' example food, beverage and entertainment, accommodation etc.

Tourism Establishment Survey: Is a survey on Tourism establishments that aims to ascertain the supply side of tourism contribution. It targets specific establishments that provide services to tourists.

Tourism Satellite Account: Accounting system that helps to estimate Gross Value Added of the Tourism Sector and its contribution to the national economy.

CHAPTER ONE: INTRODUCTION

1.1: Background of the Survey

The Tourism Establishment Survey was conducted to improve on the availability of Tourism Statistics and thus provides key information for the Tourism Satellite Account (TSA). The survey is implemented with the objective of getting data from establishments that provide services to the tourist in various sub-sectors such as accommodation, food, beverage and entertainment, transport operators and other Tourism establishments such as casinos, betting centers, retail shops/services, tourist taxi drivers, and tour guides, tourist attractions and bird watchers.

The Gambia like most nations in the developing world has limited data on tourism indicators which makes the generation of the 10 tables of the TSA almost impossible. Thus, this survey is part of two surveys that will complement each other, wherein the, Tourism Establishment Survey as the first, will provide information on supply side statistics and the second one; visitors survey, will present the demand side statistics.

Meanwhile, one of the eight strategic priorities for the National Development Plan (NDP – 2018-2021) states: "*Government's goal is to make tourism a highly competitive and sustainable industry that is people and culture - centered that celebrates our cultural heritage and contributes to socioeconomic development. Key interventions will focus on policy reforms in aid of competitiveness; marketing for destination recognition and attractiveness; quality service delivery; enhanced security; product diversity; enhanced community participation and greater linkages with other sectors especially agriculture and natural resources, as well as promotion of the Gambia's biodiversity and rich culture through opening up the sector to rural and non-urban based locations. These measures will boost tourism arrivals, tap high value market segments and contribute to jobs and economic diversification*".

The Gambia Tourism Establishment Survey was funded by the United Nations Development Programme (UNDP) country office and technical assistance was provided by the United Nations

World Tourism Organization (UNWTO), thus a consultant was hired from the design of the survey to the production of the final report.

1.2: Objectives of the Survey

The survey was conducted to primarily generate the supply side indicators that will complement the demand side towards the development of the Tourism Satellite Account (TSA) for The Gambia.

The other objectives of the survey are;

- To be able to generate data that will help account for the contribution of the Tourism Industry to the economy in terms of Gross Value Added (GVA).
- To help determine the value of key measures of Tourism in the country in terms of employment, revenue generation, expenditure and gross operating profit as a percentage of turnover.
- To generate more variables for the development of tourism statistics, thus providing a framework of Tourism statistics indicators.

1.3: Sampling

1.3.1: Sampling frame and stratification

Probability sampling design requires a list or register of population elements from which the sample is drawn. Although in this Survey, there is no readily available sampling frame of all the establishments in the Tourism Sector, careful selection of the sample was done using the accurate alternative frame that was previously developed by the Gambia Tourism Board. As the largest employer in the tourism sector with an expected highest annual turnover than any other establishment, all the 51 hotels were included in the sample. Other establishments and addresses were listed by various industry domains. For example, all the bars and restaurants were listed as first domain; beach bars as second domain; guest houses, lodges and motels were the third; ground tour operators as the fourth; casinos, gaming and betting houses as the fifth; equipment hirers as the sixth; and retail shops and services comprise of the last domain. These domains were used as stratification variables to reduce variability in the frame and also increase precision of the estimates within the strata. Furthermore, simple random sampling was used to draw samples from each of the seven strata.

1.3.2: Sample Size

Considering that the true variability of the characteristic of interest in the population is unknown in advance, the sample size in this survey was computed taking into account the size of the entire establishments in the sector, the sample design and method of estimation and the response rate.

For each of the respective seven domains, the true proportion of turnover from international visitors by air is not quantified in the previous studies and therefore, an assumption of 0.5 was considered. Given that it's satisfactory if the true population proportion is within ±.10, an anticipated response rate of 0.70 was used to effectively achieve the desired precision for the estimates. Thus, the sample size for the survey is computed as follows.

$$n_0 = \frac{z^2 \times p \times (1-p)}{e^2}$$

$$n_1 = \frac{n_0 \times N}{n_0 + (N-1)}$$

$$n_2 = deff \times n_1$$

$$n = \frac{n_2}{RR}$$

Where;

z = a value corresponding to a desired level of confidence (a 95 per cent confidence level is assumed)

p = the proportion of turnover from international visitors by air is assumed 0.5

e = satisfied if the true population proportion is within ±.10 of the estimated

N = target population of establishments per stratum

n = required sample size (number of establishments) per stratum

deff = design effect of 0.80

RR =expected response rate (70 per cent response rate was assumed)

The resulting sample sizes for each of the domains after adjusting for the non-responses are presented in Table 1.1 below. Considering the importance of hotels in the industry, all the hotels were covered during the survey that is why they did not appear in table 1.1 below.

Table 1.1: Allocation of sample to strata by establishment, 2018

Establishment	N	n	Sample size, n
Bars and Restaurants	122	61.6970	62
Beach Bars	46	35.7981	36
Guest Houses/Lodges & Motels	149	67.0146	68
Ground Tour Operators	31	26.9959	27
Casinos, Gaming & Betting Houses	23	21.3866	22
Equipment Hirers	44	34.7342	35
Retail Shops/ Services	39	31.9355	32
Total	**454**		**282**

This means that the establishments for the survey totaled to 333 (i.e. inclusive of hotels).

Table 1.2: Response rate by Tourism Characteristic industry, 2018

Tourism Industry Characteristic	Establishments Interviewed	Respons e Rate	Non-contact Rate[1]	Refu sed
Accommodation; hotels, lodges, guest houses	87	73.7	22.8	4.2
Food, beverage and entertainment	64	65.3	27.6	7.1
Transport Operators; Ground Tour Operators	23	85.2	11.1	3.7
Sporting and Recreational Activities; Casinos, Gaming & Betting Houses	8	36.4	63.6	0.0
Transport Equipment Rental ;Equipment Hirers	19	54.3	45.7	0.0
Retail Shop /service	21	65.6	34.4	0.0

[1] These were the establishments that were either closed or could not be traced during the survey.

1.3.3: Weighting

Establishments were selected from each stratum. Weights were computed by taking the inverse of the product of the probability of selection at each stage. In order to compensate for distortions introduced by the sample design and non-response, weights were used in this survey to adjust the distribution of the sample to match the population distribution. The final weights were then applied to the sample data in order to compute the estimates.

1.3.4: Individual as the primary sampling units

A list of names, addresses and contacts of individuals who work as tourist taxi drivers, bird watchers, tourist attractions, and official tourist guides was given by the GT Board. This list formed the second frame. It should be noted that the primary sampling unit in the first frame is establishment while in this current frame, the unit is the person. The frame consists of six hundred and ten persons. In this case, a sample size of ninety-five was recommended as per the parameters in the formula above.

1.4: Training

Five days training of 25 enumerators and 5 supervisors was conducted from the 17th to the 21st of December 2018. Mock interviews in English and in both Mandinka and Wollof local languages were conducted during the training to enable the enumerators to practice and enhance their understanding of the tools and to have a common understanding of the translation of the terminologies in case the respondents cannot speak English. On the 4th day of the training which was the 20th of December, 2018. A pretest was conducted in establishments that were not part of the sample and the purpose was to enhance the understanding of the field staff and the last day of the training was used to review the outcome of the pretest. Comments on the questionnaire that emanated from the pretest were incorporated in the tools.

1.5: Data Collection

The survey was conducted in two phases. The first phase of the exercise was done as per the consultant's advice. The first phase lasted for five days and the teams administered the questionnaires for casinos, gaming, equipment hirers and small establishments such as tourist taxi drivers and bird watchers, which were for the relatively smaller establishments. This was to monitor the flow of the questions and how the respondents will react for better planning in the second phase of the exercise. The second phase lasted for 15 days making it a total of 20 days of data collection involving 5 teams. Each team consisted of a supervisor and 4 enumerators. There were two field coordinators, one from GBoS and the other from the Gambia Tourism Board to coordinate the data collection exercise.

Limitations of the Survey

- Some establishments were closed or were not in business during the survey. This affected the response rate even with the extra amount of effort and time spent on call backs.
- There was also little or no corporation of the sampled establishments during the survey; this led to a number of refusals.
- The sampling frame of the small tourism establishments was mostly centered on tourist taxis this makes the sample to have few establishments like tourist attraction centers and craft markets. The nature of some of the establishments like supermarkets and travel agencies which mainly serve the locals made it difficult to capture them. This in total made the total number of establishments covered to be small.

CHAPTER TWO: ACCOMODATION ESTABLISHMENTS

2.1: Introduction

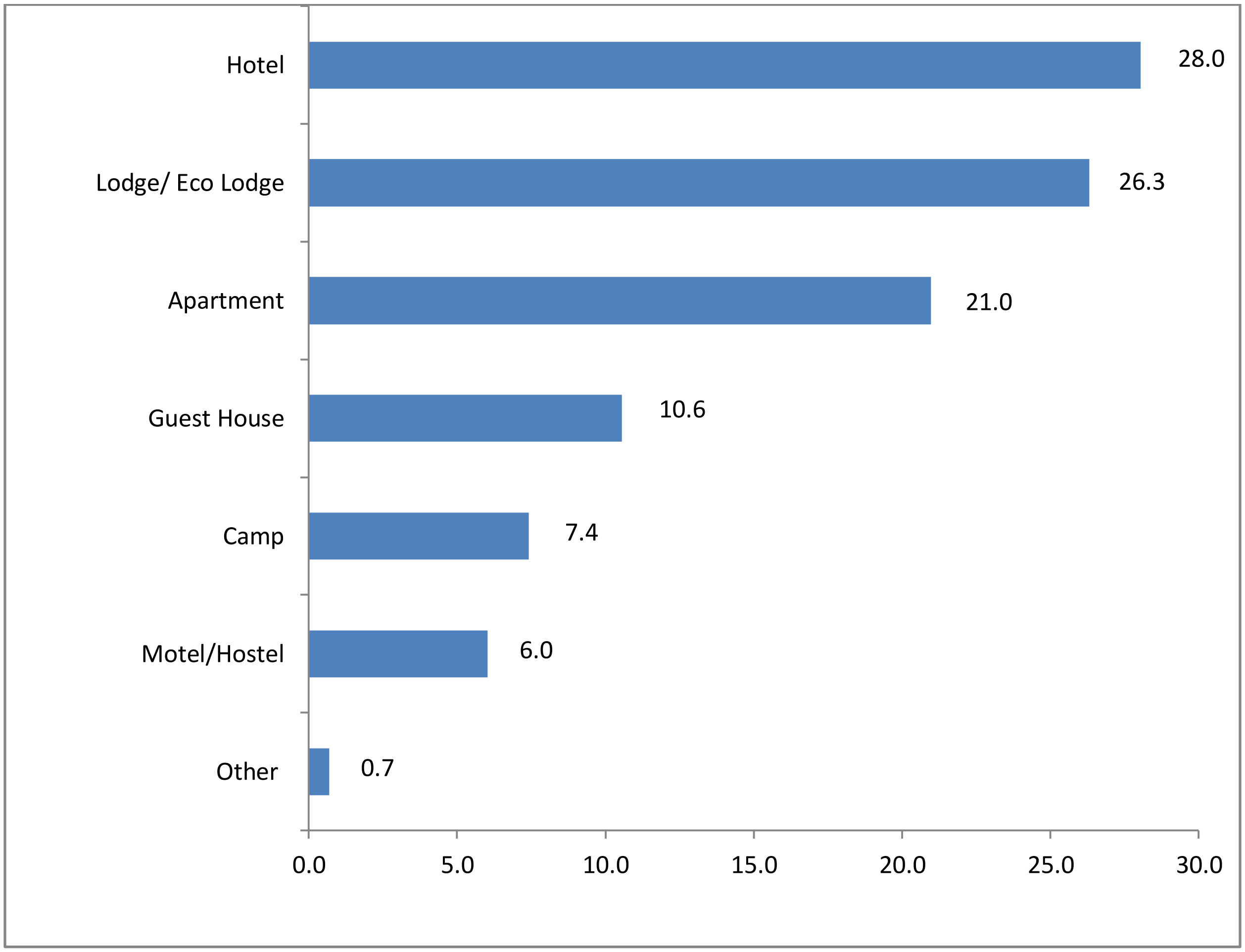
Tourist accommodation refers to any facility that regularly or occasionally provides overnight accommodation for tourists according to the United Nations World Tourism Organization (UNWTO). Accommodation establishments are key variables in the Tourism Sector and to a large extent influence the development of tourism in many destinations to which The Gambia is no exception. For instance, facilities offered by accommodation establishments and the quality and standard of services could be a catalyst to attracting more visitors by enhancing their appeal; provide more employment opportunities; and most importantly increase the tourism's contribution to Gross Domestic Product (GDP).

Although hotels are the first things that comes to mind when accommodation is mentioned in tourism; there are however other major accommodation establishments that are important in promoting tourism. These include; lodge/eco lodge, apartment, guest house, camp, and motel/hostel.

Given that there are different types of accommodations, namely; hotel, lodge/eco lodge, apartment, guest house, camp, motel/hostel and others, the analysis sought to establish the distribution of accommodation by type of business. Figure 2.1 shows that most of the accommodation types were hotels with 28 per cent, followed by lodges/ eco lodges with 26.3 per cent and apartments accounted for 21 per cent. Guest houses, camps and motels/hostels accounted for 10.6 per cent, 7.4 per cent, and 6 per cent respectively of the accommodations. And the other category (0.7%) include timeshare[2] which is distinguish from the other forms of accommodation as it includes renting or owning a specific accommodation for a specific period of time.

[2] Represents the other type of accommodation in this chapter, it is different from the other types of accommodations.

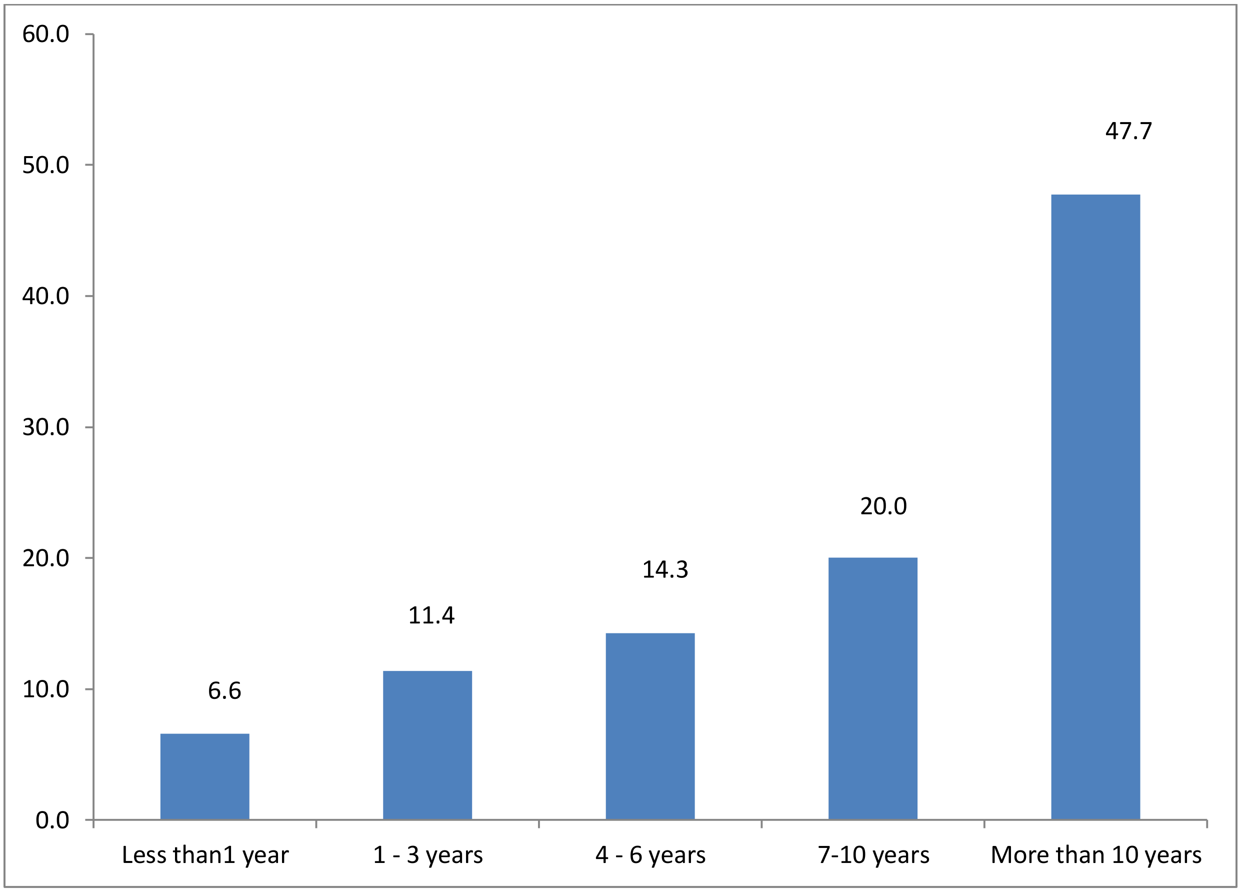
Figure 2.1: Percentage distribution of accommodation establishments by type of accommodation, 2018



2.2: Duration of Operation

Figure 2.2 shows percentage distribution of accommodation establishments by the number of years they have been in operation. Most of the establishments have been in operation for more than 10 years (47.7 %), followed by establishments in operation between 7-10 years (20 %). Slightly more than 14 per cent and 11.4 per cent of the establishments had been in operation between 4-6 years and 1-3 years respectively. Establishments that have been in operation for less than 1 year accounted for the lowest proportion of about 7 per cent.

Figure 2.2: Percentage distribution of accommodation by years in operation, 2018



2.3: Activities

As accommodation establishments do render other services apart from rooms they provide to guests, table 1 shows analysis of other types of activities offered by the establishments. Majority of the hotels, about 93 per cent provided restaurant services, while 46.3 per cent and 51.2 per cent of the hotels offer both spa/massage therapy and renting of business space respectively.

About 73 per cent of the camps offer transport services, 29.3 per cent and 28 per cent of the hotels and apartments offer transport services respectively to the guests. For lodges/ eco lodges, 61.1 per cent offer restaurant services, and a quarter offer transport services. As expected spa/massage therapy, retailing, and renting of business space are services barely offered by lodges/ eco lodges. Motels/ hostels only provided retailing services, which accounted for 22.2

per cent and the guest houses provided only restaurant services, which accounted for13.3 per cent.

Table 2.1: Percentage distribution of accommodation by type of activities, 2018

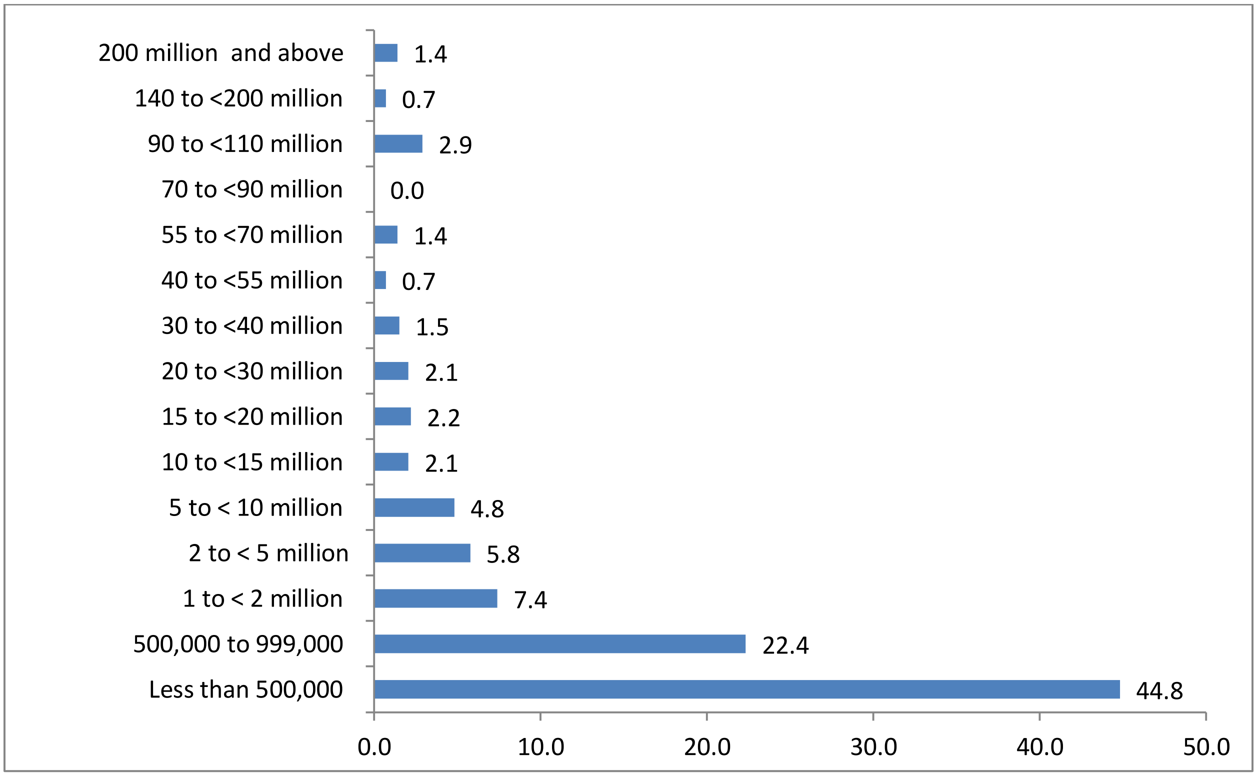
Types of Accommodation	Activities						
	Restaurant	Spa/ Massage Therapy	Transport	Retailing	Renting of Business Space	None	Other
Hotel	92.7	46.3	29.3	39.0	51.2	7.3	14.6
Camp	72.7	0.0	72.7	36.4	9.1	9.1	0.0
Lodge/ Eco Lodge	61.1	5.6	25.0	5.6	8.3	36.1	0.0
Motel/Hostel	0.0	0.0	0.0	22.2	0.0	77.8	22.2
Apartment	16.0	0.0	28.0	8.0	16.0	40.0	0.0
Guest House	13.3	0.0	0.0	0.0	0.0	86.7	0.0

2.4: Turnover of Accommodation Establishment

The findings of the survey shows that most of the accommodations (44.8%) had turnover less than GMD 500,000, of which lodges/eco lodges accounted for 35.2 per cent, apartments - 21 per cent, and hotels - 11 per cent. This is followed by accommodations with turnover between GMD 500,000 - GMD 999,000 of which lodges/ eco lodges accounted for the majority with 27 per cent, followed by apartments and guest houses with 23 per cent and 20 per cent respectively. Apartments constituted majority of accommodation establishments with turnover between GMD 2 to < GMD 5 million (52%).

Accommodation establishments with turnover between GMD 90 to < GMD 110 million accounted for 2.9 per cent, and those with turnover between GMD140 to <GMD 200 million and GMD200 million or above accounted for 0.7 per cent and 1.4 per cent respectively (see Figure 2.3).

Figure 2.3: Distribution of turnover (GMD), 2018

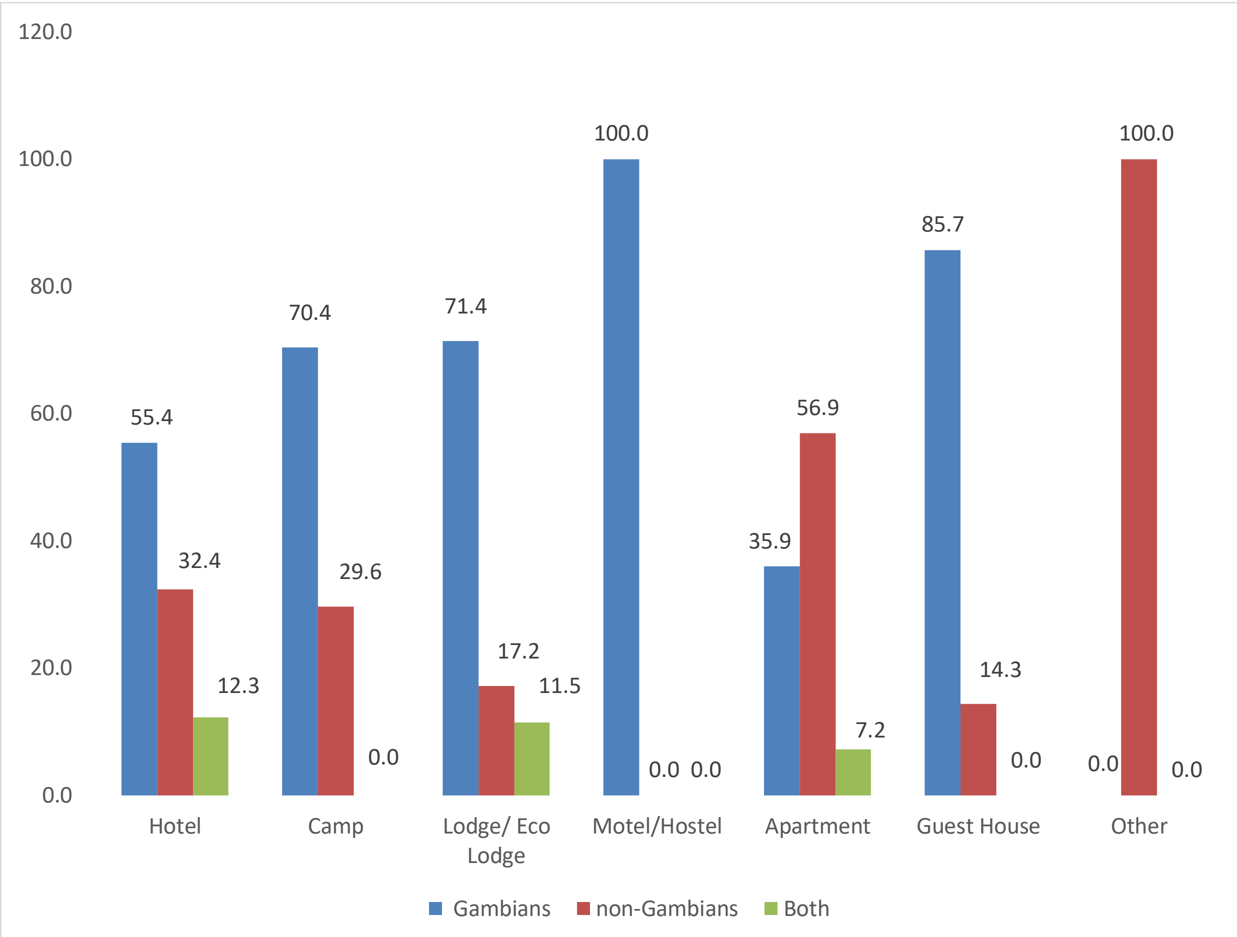


2.5: Nationality of Main Shareholder(s)

Overall, 62.1 per cent of the accommodation establishments had Gambians as main shareholder(s); 29.9 per cent had non- Gambians as main shareholder(s); and 8 per cent had both Gambians and non- Gambians as main shareholder (s).

With the exception of apartments which had majority of main shareholder(s) as non- Gambians, all other accommodation establishments had more than half of their main shareholders as Gambians. Figure 2.4 shows that hotels and lodges/ eco lodges had the highest proportion of main shareholders as both Gambians and non-Gambians with 12.3 per cent and 11.5 per cent respectively. All the motels/hostels were mainly owned by Gambians. The other is timeshare and is mainly owned by non-Gambians.

Figure 2.4: Percentage distribution of accommodation by nationality of main shareholder(s), 2018



2.6: Employment

2.6.1: Employees of the Accommodation Establishments

Employment is an important indicator in measuring the value of Tourism in an economy. Accommodation establishments are naturally expected to employ a large share of the sector given the numerous services they offer to the guests. The table below shows the distribution of employees by work status, nationality and sex of the accommodation establishments.

The data in the table below shows that the total number of persons employed by the accommodation establishments was 5,312 of which 5,153 were Gambians and 159 non-

Gambians. Out of the Gambians employed, 3,365 were males, and 1,788 were females. For the non-Gambians, 106 were males and the remaining 53 were females.

On work status, 4,769 persons employed were on full time, while 543 were part time/casual workers. Gambians employed full time were 4,637, of which 3,088 were males and 1,549 were females.

Table 2.2.1: Distribution of employees in accommodation establishments by type of contract, nationality and sex, 2018

	Full Time			Part Time/ Casual			Total		
Nationality	**Male**	**Female**	**Sub-Total**	**Male**	**Female**	**Sub-Total**	**Male**	**Female**	**Total**
Gambian	3, 088	1,549	4,637	277	239	516	3,365	1,788	5,153
non-Gambian	103	30	133	3	23	26	106	53	159
Total	**3,191**	**1,578**	**4,769**	**280**	**263**	**543**	**3,471**	**1,841**	**5,312**

2.6.2: Seasonal Employees

Voluntary work is a common practice in the Tourism Sector. Given that seasonality is a contributing factor to workers being laid off and also coupled with the fact that the industry offers other opportunities apart from remuneration, some workers volunteer to work without any formal employment contract-as unpaid workers.

Table 2.2.2 shows the distribution of employees by nature of employment and sex. Out of the 3, 625 employees, 3,545 were paid employees of which 2,411 were males and 1,214 were females. Unpaid employees were 80 which comprised of 35 males and 45 females.

Table 2.2.2: Distribution of seasonal employees in accommodation establishments by work status and sex, 2018

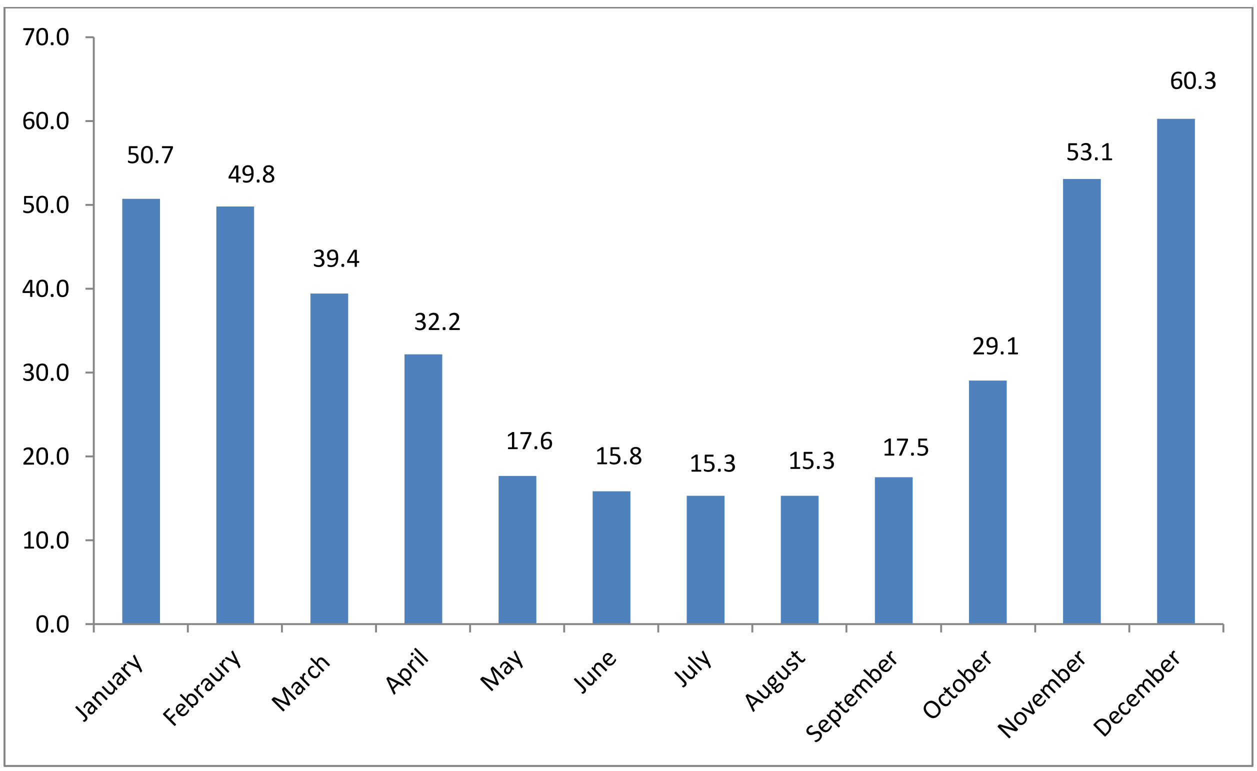
Seasonal	Male	Female	Total
Paid	2,376	1,169	3,545
Unpaid	35	45	80
Total	**2,411**	**1,214**	**3,625**

2.7: Occupancy by Months

Occupancy rate provides an indication of the level of demand for accommodation. With accommodation being one of the most important facilities for Tourist in The Gambia, collecting information on occupancy would serve as a yardstick to gauge the average utilization of accommodation facilities in the country.

Figure 2.5 shows the distribution of average monthly occupancy for the year 2018. Overall, average monthly occupancy for the year 2018 was 33 per cent. The average occupancy by month clearly shows the disparity in occupancy level at different times of the year, especially between peak months (e.g. November to February) and lean months (e.g. May to September). December registered the highest monthly occupancy with 60.3 per cent. Relatively low average occupancy rates were recorded in May, June, July, August, and September with 17.6 per cent, 15.8 per cent, 15.3 per cent, 15.3 per cent, and 17.5 per cent respectively.

Figure 2.5: Percentage distribution of average occupancy by month, 2018



2.8: Available Facilities

Information on the availability of facilities such as restaurants, sports recreation, online reservation, parking space, for Tourist or resident visitors to use during leisure to facilitate and enhance their comfortable stay in the different types of accommodation was asked during the survey. For all the 41 hotels interviewed, majority (92.7%) had restaurants, 87.8 per cent had parking space for vehicles. A limited number of the hotels had sport and recreation facilities such as gyms, with 29.3 per cent providing transport services for the visitors. All the camps had parking space for vehicles and about 73 per cent of the camps had restaurants, 54.5 per cent offer transport services. For the lodges / eco lodges, 66.7 per cent had restaurants, and 69.4 per cent had parking space (see Table 2.3a).

Table 2.3a: Percentage Distribution of Available Facilities by Type of Accommodation, 2018

	Facilities					
Type of Accommodation	**Count**	**Restaurant**	**Sport Recreation**	**Transport**	**Parking Space**	**Online Reservation**
Hotel	41	92.7	41.5	29.3	87.8	63.4
Camp	11	72.7	18.2	54.5	100.0	9.1
Lodge/ Eco Lodge	38	66.7	11.1	41.7	69.4	36.1
Motel/Hostel	9	0.0	0.0	28.6	28.6	28.6
Apartment	30	13.3	6.7	13.3	80.0	66.7
Guest House	15	26.7	0.0	0.0	26.7	0.0

About 87.8 per cent of the hotels provided wireless internet service, about one - third (63.4%) had electronic payment systems, 61 per cent had foreign exchange facilities and 58.5 per cent had stores / specialty shops and 50 per cent of the lodges/eco lodges had wireless internet services. The other facilities included conference hall, shops, and gyms (see Table 2.3b).

Table 2.3b: Percentage Distribution of Available Facilities by Type of Accommodation, 2018

Type of accommodation	Count	Facilities					
		Electronic Payment	Wireless Internet	Foreign Exchange	Stores / Specialty	Duty Free	Other Facilities
Hotel	41	63.4	87.8	61.0	58.5	4.9	9.8
Camp	11	0.0	45.5	0.0	18.2	0.0	0.0
Lodge / Eco Lodge	38	5.6	50.0	19.4	30.6	0.0	19.4
Motel / Hostel	9	0.0	28.6	0.0	0.0	0.0	28.6
Apartment	30	10.0	86.7	0.0	13.3	0.0	13.3
Guest House	15	0.0	46.7	0.0	26.7	0.0	0.0

2.9: Operating Expenses

Information on accommodations expense on routine day-to-day activities was collected. The findings of the survey shows that 48.2 per cent of all expenses incurred by accommodation establishments were on material and services, 33.4 per cent on labor cost and 18.4 per cent on other costs like electricity, water bills, maintenance cost, and fuel (see Table 2.4a).

Table 2.4a: Percentage distribution of operating expenses of accommodations by cost, 2018

Type of Cost	Per cent
Labour	33.4
Material and Service	48.2
Other	18.4
Total	**100.0**

Table 2.4b shows that 1.4 per cent of the accommodations interviewed spent between GMD110 to GMD140 million in 2018. Majority of the accommodations (51.4%) spent less than half a million (GMD500.000) on operational activities in 2018, while 19.3 per cent spent between GMD500, 000 to GMD1 million, 6.7 per cent of the establishments spent between GMD1 million to GMD2 million and 9.3 per cent spent between GMD3 to GMD5 million.

Table 2.4b: Operating expenses of accommodation, 2018

Expenses (GMD)	Count	Per cent
Less than 500,000	75	51.4
500,000 to 999,000	28	19.3
1 to < 2 million	10	6.7
2 to < 5 million	14	9.3
5 to < 10 million	8	5.5
10 to <15 million	3	2.2
15 to <20 million	1	0.7
20 to <30 million	3	2.1
30 to <40 million	0	0.0
40 to <55 million	0	0.0
55 to <70 million	1	0.7
70 to <90 million	0	0.0
90 to <110 million	1	0.7
110 to <140 million	2	1.4
140 to <200 million	0	0.0
200 million plus	0	0.0
Total	**145**	**100.0**

2.10: Expenditure on Materials and Services

Overall, majority of the expenditures incurred by the establishments on materials and services were purchased locally (85.3%) and (14.7%) were imported. The findings further show that the proportions of expenditure on services purchased locally was 92 per cent, and 8 per cent was imported. Similarly, 77 per cent of the materials purchased were done locally while 23 per cent was imported. It is not surprising to see that most of the other costs are purchased locally given that these include cost of electricity, water bills, maintenance cost, and fuel which are locally sourced (see Table 2.5).

Table 2.5: Percentage distribution of expenditure on materials and services by source of purchase, 20I8

Purchase	Imported	Purchased locally
Purchases of Materials	23.0	77.0
Purchases of Services	8.0	92.0
Other	10.7	89.2
Total	**14.7**	**85.3**

2.11: Gross Operating Profit

Gross operating profit as a percentage of turnover of the accommodation establishments was collected and the data shows that 38.8 per cent of the establishments reported having a negative gross operating profit or profit of between (0% -5%) on their turnover. The findings of the survey also shows that 20.4 per cent of the establishments had gross operating profit of (6% - 10%), 11.7 per cent had (16 % – 20%) and 7.2 per cent and 5.2 per cent reported to have a gross operating profit of between, (21% - 25%), (26% - 30%) on their turnover respectively (see Table 2.6).

Table 2.6: Gross operating profit as a percentage of turnover, 2018

Gross operating profit	Count	Per cent
Loss or 0% - 5%	56	38.8
6% – 10%	30	20.4
11%-15%	10	6.5
16% – 20%	17	11.7
21% – 25%	11	7.2
26% – 30%	8	5.2
31% – 35%	6	4.4
36% – 40%	6	4.4
41% - 45%	2	1.4
46% - 50%	0	0.0
51% - 55%	0	0.0
56% +	0	0.0
Total	**145**	**100.0**

2.12: Turnover from Visitors

Information on turnover (total revenue) generated by accommodations from international visitors and residents was collected. Table 2.7 shows that international visitors contribute 72 per cent of the turnover and the residents contribute 28 per cent. The data shows that the international visitors contribute to turnover of accommodations more than residents in all the types of accommodations except in motels/hostels and other types of accommodation. As shown in the table below, the international visitors' contribution to turnover was 86 per cent for guest houses, apartments (78%), hotels (79%), camps (67%) and lodges / eco lodges (63%) which was more than resident visitors' contribution to turnover.

Table 2.7: Percentage distribution of turnover of accommodation establishments by type of visitors, 2018

Types of accommodation	Count	International Visitors	Residents
Hotel	41	79.0	21.0
Camp	11	67.0	33.0
Lodge/ Eco Lodge	38	63.0	37.0
Motel/Hostel	9	48.0	53.0
Apartment	30	78.0	22.0
Guest House	15	86.0	14.0
Other	1	10.0	90.0
Total	**145**	**72.0**	**28.0**

CHAPTER THREE: FOOD, BEVERAGE AND ENTERTAINMENT ESTABLISHMENT

3.0: Introduction

This chapter covers the food, beverage and entertainment sub-sector. This sub-sector is very important for the Tourism industry, as it provides the different dishes and taste of the various types of dinks and beverages available as well as entertainment for tourists. It also serves as a catalyst to enhance small and medium enterprises and employment in a nation. It is observed from the table below that restaurants accounted for the highest proportion of the establishments covered in this sub-sector with 71.5 per cent followed by beach bars with about 24 per cent and night clubs accounted for the lowest proportion with 4.7 per cent.

Table 3.1: Percentage Distribution of type of food, beverage and entertainment establishments, 2018

Type of Food, Beverage and Entertainment Establishment	Count	Per cent
Restaurant	79	71.5
Night Club	5	4.7
Beach Bar	26	23.9
Total	**110**	**100.0**

3.1: Duration of Operation

The findings of the survey shows that most of the establishments (28.3%) reported to have been in operation for more than 10 years and about 21 per cent reported that they were in operation between 1-3 years. Establishments that have been in business for less than one year and those in operation between 4-6 years accounted for the lowest proportions with 14.7 per cent and 14.2 per cent respectively (see Table 3.2).

Table 3.2: Duration of Operation, 2018

Years in Business	Count	Per cent
Less than1 year	16	14.7
1 - 3 years	23	20.8
4 - 6 years	16	14.2
7-10 years	24	21.9
More than 10 years	31	28.3
Total	**110**	**100.0**

3.2: Activities

The food, beverage and entertainment offer a lot of services among them are catering, amusement, retailing and renting of business space. About 42 per cent and 46.2 per cent of the restaurants and beach bars reported to have catering services respectively.

And most of the night clubs (60%) do retailing services followed by catering services (20%). It is observed that only the beach bars offer renting of business space (4 %). The other activities include fund raising events, massage (see Table 3.3).

Table 3.3: Distribution Food, beverage and entertainment Establishments by type of Activities, 2018

Type of Food, beverage and entertainment Establishment	Count	Activities					
		Catering	Amusement	Retailing	Renting	None	other
Restaurant	79	41.8	20.3	7.6	0.0	41.8	2.5
Night Club	5	20.0	20.0	60.0	0.0	0.0	20.0
Beach Bar	26	46.2	23.1	38.5	3.8	19.2	11.5
Total	**110**	**41.8**	**22.7**	**17.3**	**3.0**	**34.5**	**5.5**

3.3: Turnover of the Food, Beverage and Entertainment Establishments

Information about revenue especially in terms of sales is essential especially in defining the scale of a particular business. The respondents of the various establishments were asked their revenue for 2018. About 46 per cent of the establishments reported to have a turnover of less than GMD 500,000. The data also shows that 29.6 per cent of the establishments had a turnover of between GMD 500,000 to GMD 999,000 and about 2 per cent of the establishments in the food, beverage and entertainment sub-sector reported a turnover between GMD 20- GMD30 million (see Table 3.4).

Table 3.4: Distribution of turnover, 2018

Turnover (GMD)	Count	Per cent
Less than 500,000	50	45.6
500,000 to 999,000	33	29.6
1 to < 2 million	12	11.2
2 to < 5 million	13	11.9
5 to < 10 million	0	0.0
10 to < 15 million	0	0.0
15 to < 20 million	0	0.0
20 to <30 million	2	1.8
Total	**110**	**100.0**

3.4: Nationality of Main Shareholder(s)

Regarding nationality of the main shareholder(s) of the establishments, slightly more than 58 per cent of the establishments reported to have Gambians as main shareholders. Non-Gambians were the main stakeholder(s) for about 36 per cent of the establishments and 5.9 per cent were reported to be owned by both nationalities. It is observed that half of the restaurants reported that their main shareholders were Gambians; for the beach bars (75.7%) were owned by Gambians and all the night clubs covered during the survey were owned by Gambians (see Table 3.5).

Table 3.5: Percentage Distribution of Food, beverage and entertainment Sub-sector by Nationality of main shareholder(s), 2018

Type of Food, beverage and entertainment Establishment	Count	Gambian	non-Gambian	Both
Restaurant	79	50.0	45.0	5.0
Night Club	5	100.0	0.0	0.0
Beach Bar	26	75.7	14.6	9.7
Total	**110**	**58.4**	**35.7**	**5.9**

3.5: Employment

3.5.1: Employees of the Food, Beverage and Entertainment Sub-sector

Tourism as a service sector is however characterized by a huge labour intensive kind of employment. Information on employment of the food, beverage and entertainment sub-sector was collected and the data shows that total employment in the sub sector was 2, 114 employees.

Disaggregating the data by nationality, 2, 031 of the employees are Gambians and 83 are non-Gambians. By sex 1, 229 of the employees are males and 885 are females (see Table 3.6.1)

Table 3.6.1: Distribution of employees in the Food, beverage and entertainment Sub-Sector by type of contract, nationality and sex, 2018

	Full Time			Part Time/ Casual			Total		
Nationality	**Male**	**Female**	**Sub-Total**	**Male**	**Female**	**Sub-Total**	**Male**	**Female**	**Total**
Gambian	1,002	777	1,779	153	99	252	1,155	876	2,031
non-Gambian	51	8	59	23	1	24	74	9	83
Total	**1,053**	**785**	**1,838**	**176**	**100**	**276**	**1,229**	**885**	**2,114**

3.5.2: Seasonal Employees

Given that the Gambian Tourism industry is usually termed seasonal, with majority of the establishments operating around October to April and closing around May to September (termed as the summer or green season), it was important to capture seasonality in terms of employment. That is employees who were mainly employed during the high season out of the total employees in the year. The table below shows that there were 781 employees during the 2018 green season, of which 714 were paid and 67 were unpaid. By sex, 474 of the seasonal employees are males and 307 females.

Table 3.6.2: Distribution of Seasonal employees in the food, beverage and entertainment Sub-Sector by work status and sex, 2018

Seasonal	**Male**	**Female**	**Total**
Paid	424	290	714
Unpaid	50	17	67
Total	**474**	**307**	**781**

3.6: Available Facilities

Table 3.7 below shows the percentage distribution of available facilities in the food, beverage and entertainments sub-sector. The data shows that, rest/comfort rooms and wireless internet-WI-FI were the most available facilities in all these establishments.

Table 3.7: Percentage distribution of food, beverage and entertainment Sub-sector by facilities, 2018

	Type of food, beverage and entertainment establishment			
Facilities	**Restaurant**	**Night Club**	**Beach Bar**	**Total**
Count	79.0	5.0	26.0	110
Restrooms/ Comfort rooms	74.7	80.0	76.9	75.5
Transport Facilities	22.8	0.0	11.5	18.2
Parking Space	46.8	20.0	73.1	52.7
Online Reservation	15.2	20.0	23.1	18.2
Electronic Payment	10.1	20.0	0.0	8.2
Wireless Internet – Wi-Fi	69.6	60.0	73.1	69.1
Foreign Exchange Counter	5.1	0.0	0.0	3.6
Stores/ Specialty Shops	20.3	0.0	15.4	18.2
Amusement/ Recreation	15.2	0.0	11.5	12.7
Cultural / Recreational Shows	22.8	0.0	46.2	26.4
Other	15.2	20.0	11.5	14.5

3.7: Operating Expenses

The data in table 3.8a shows that the food, beverage and entertainments sub-sector has a higher percentage of material and service cost (53 %), compared to labour (36 %) and other costs (11 %).

Table 3.8a: Distribution of operating expenses of food, beverage and entertainment Sub-Sector, 2018

Type of Cost	Per cent
Labour	36.0
Material and service	53.0
Other	11.0
Total	**100.0**

The data shows that in the sub sector, establishments with expenditure less than GMD500,000 accounted for the highest proportion with 52.7 per cent, followed by establishments with expenses between GMD500,000- GMD999,000 (28.9%). While those with expenses of GMD15 to < GMD20 million had the least proportion with 1.8 per cent. The other costs include rental fee, electricity, water bills, license and maintenance cost of some of the facilities (see Table 3.8b).

Table 3.8b: Operating expenses of the food, beverage and entertainment Sub-Sector, 2018

Expense (GMD)	Count	Per cent
Less than 500,000	58	52.7
500,000 to 999,000	32	28.9
1 to < 2 million	8	7.7
2 to < 5 million	8	7.2
5 to < 10 million	2	1.8
10 to < 15 million	0	0.0
15 to <20 million	2	1.8
Total	**110**	**100.0**

3.8: Expenditure on Materials and Services

Regarding the sources of materials and services, the data in the table below shows that, 93 per cent of expenditure on materials and services were purchased locally, while 7 per cent were imported. The data further shows that materials imported was higher than the services imported whilst services procured locally was higher than the materials purchased locally. Given that the other costs include electricity bills, water bills and maintenance of some facilities of the establishments, the data shows that all these expenses were sourced locally.

Table 3.9: Percentage distribution of expenditure on materials and services by source of purchase, 20I8

Purchase	Imported	Purchased locally
Material	11.9	88.1
Service	5.5	94.5
Other	0.0	100.0
Total	**7.0**	**93.0**

3.9: Gross Operating Profit

The data in table 3.10 shows that 26 per cent of the establishments reported a loss or (0%-5%) profit and 24.2 per cent reported to have a gross operating profit of (16%-20%) and 16.1 per cent had (6%-10%), while 15.5 per cent of the establishments had a profit of (21%-25%).

Table 3.10: Gross operating profit as a percentage of turnover, 2018

Gross operating profit	Count	Per cent
Loss or 0% - 5%	29	26.0
6% -10%	18	16.1
11%-15%	4	3.6
16% -20%	27	24.2
21% - 25%	17	15.5
26% - 30%	4	3.5
31% - 35%	4	3.6
36% - 40%	4	3.5
41% - 45%	1	1.2
46% - 50%	0	0.0
51% - 55%	1	1.2
56% +	2	1.8
Total	**110**	**100.0**

3.10: Turnover from Visitors

The table below shows that 61.1 per cent of turnover of the establishments is from international visitors, while 38.9 per cent from local residents. Furthermore, the data shows that, beach bars have the highest proportion of turnover from the international visitors, while night clubs have the highest proportions of turnover from the local residents.

Table 3.11: Percentage distribution of turnover of the food, beverage and entertainment sub-sector by type of visitors, 2018

Type of food, beverage and entertainment establishment	International Visitors	Residents
Restaurant	59.0	41.0
Night Club	24.0	76.0
Beach Bar	74.0	26.0
Total	**61.1**	**38.9**

CHAPTER FOUR: TRANSPORT SUB-SECTOR

4.0 Introduction

This chapter presents the transportation sub-sector of the Tourism industry by duration of operation, type of activities, nationality of main shareholders, employment (type and seasonality), available facilities, services provided, operating expenditure, operating profit and proportion of turnover from visitors .Transportation is the main means to carry passengers, that is, the tourists to the actual site where tourism services are performed. This survey focuses on Ground Tour operators.

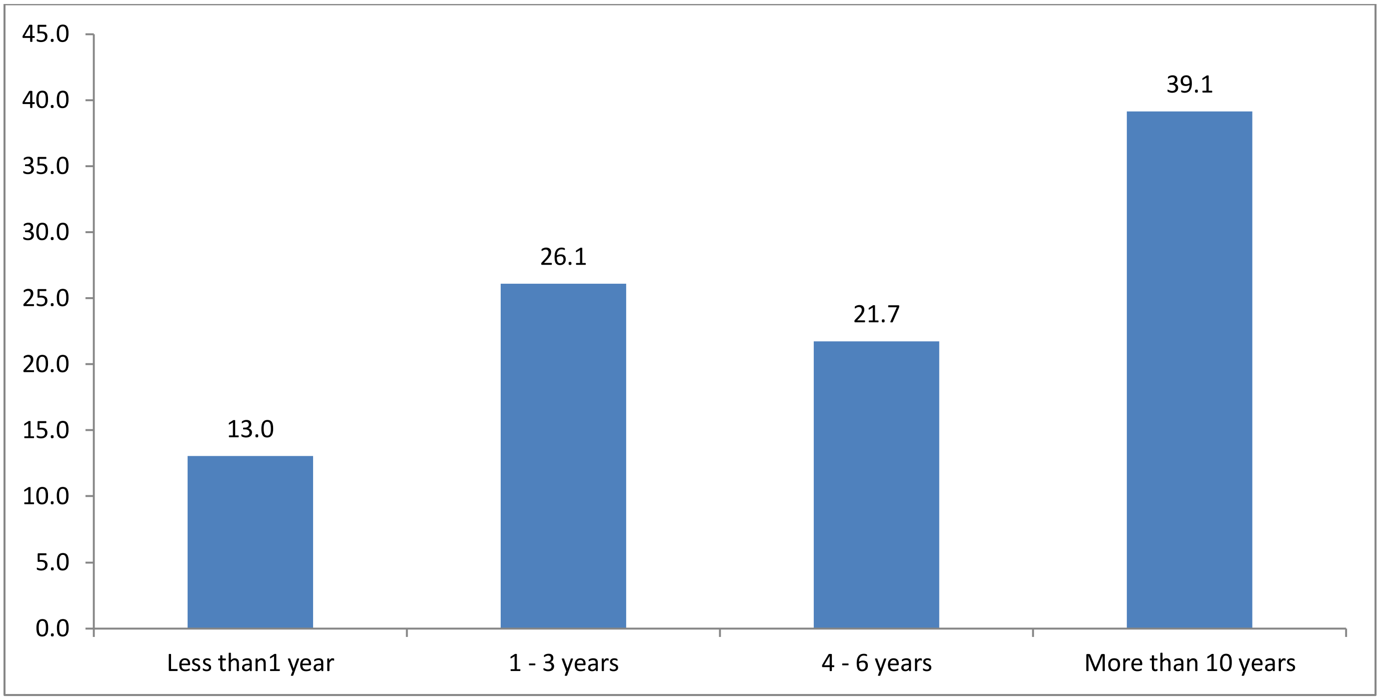
Transportation has been an integral part of the Tourism industry because; it links Tourists with various Tourist attractions. There is a general belief, that Tourism expands more when there are better transportation systems. Transportation needs to be improved for Tourism promotion and development. Tourism development could even be bigger if more could be done in various elements of transport systems.

Transportation system of a Tourist destination has an impact on the Tourism experience which explains how people travel and why they choose different forms of holiday, destination, and transport.

4.1 Duration of Operation

During the survey, 26 Ground Tour Operators were covered. Figure 4.1 shows that most Operators have been operating for more than 10 years with 39.1 per cent, followed by those in operation for 1-3 years with 26.1 per cent. Establishments in operation for less than a year at the time of the survey had the lowest proportion with 13 per cent.

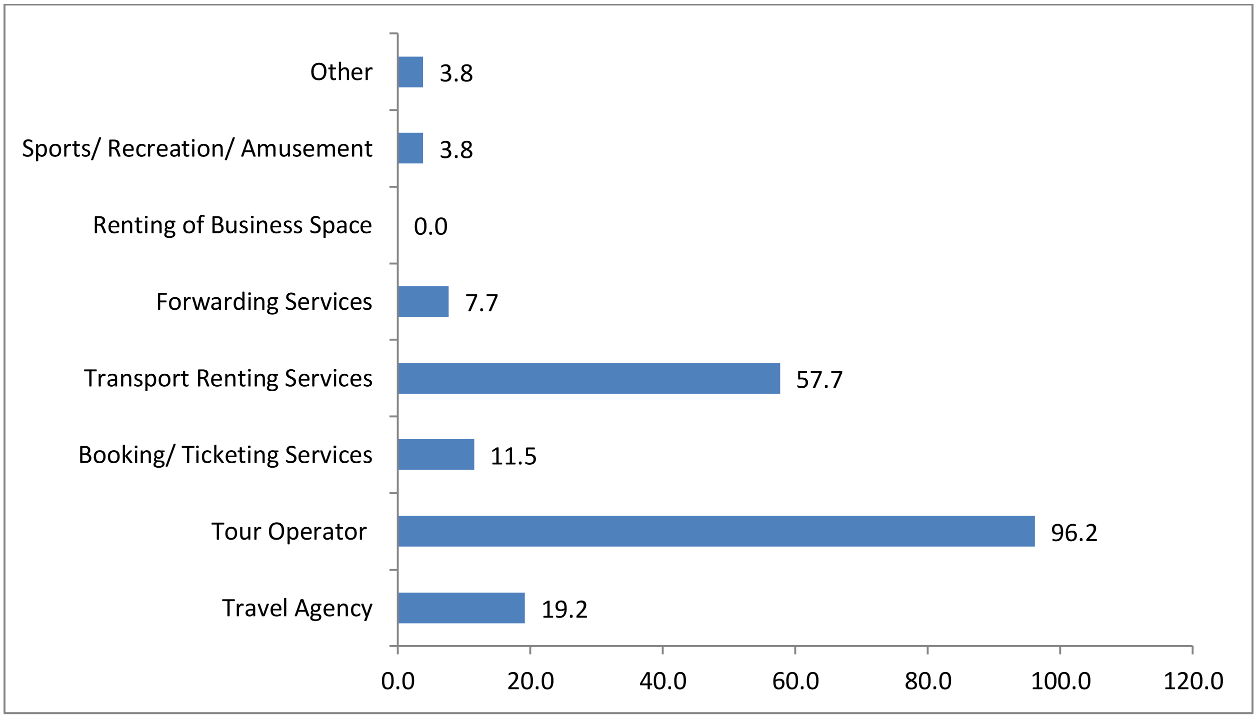
Figure 4.1: Percentage distribution of duration of operation in the transport sub-sector, 2018



4.2 Activities

Figure 4.2 shows that in the transport sub-sector, Ground Tour operations and renting of transport facilities were the main activities of the sub sector with 96.2 per cent and 57.7 per cent respectively. None of the Ground Tour Operators reported to have renting space for business purposes and this could be attributed to the nature of their operations.

Figure 4.2: Percentage distribution of transport sub-sector by type of activity, 2018



4.3: Turnover of Transport Sub-Sector

The table below shows that, 65.2 per cent of Ground Tour Operators had a turnover of less than GMD500, 000. This is followed by establishments with a turnover between GMD500, 000-GMD999, 000 (13%) and followed by those with turnover between GMD1 to < GMD2 million with 8.7 per cent.

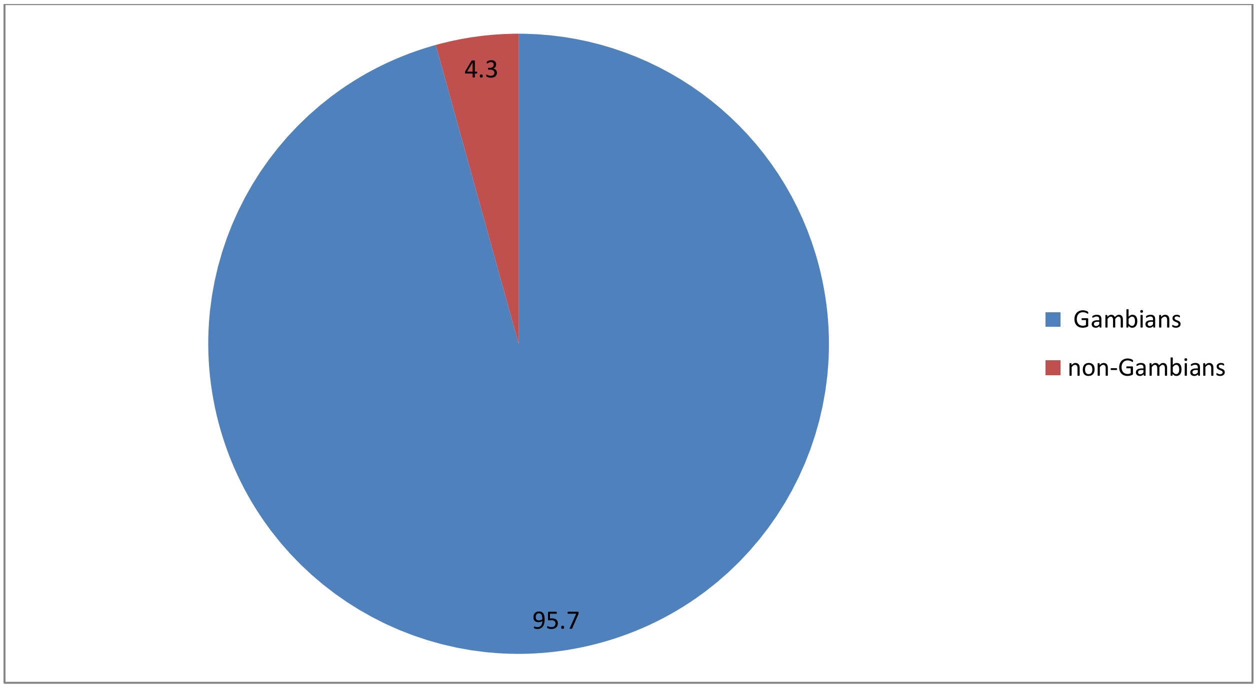
Table 4.1: Distribution of turnover, 2018

Turnover (GMD)	Count	Per cent
Less than 500,000	17	65.2
500,000 to 999,000	3	13.0
1 to < 2 million	2	8.7
2 to < 5 million	1	4.4
5 to < 10 million	1	4.4
110 to <140 million	1	4.4
Total	**26**	**100.0**

4.4 Nationality of Main Shareholder(s)

Figure 4.3 shows the percentage distribution of the transport sub-sector by nationality of the main shareholder(s). The data shows that the main shareholders of the establishments in the sub-sector are Gambians with 95.7 per cent whilst the remaining 4.3 of the main shareholder(s) in the sub sector are non-Gambians.

Figure 4.3: Percentage distribution of transport sub-sector by nationality of the main shareholder(s), 2018



4.5 Employment

4.5.1: Employees of the Transport Sub-Sector

Table 4.2.1 shows that 293 workers were employed in the transport sub-sector. Males constituted the highest number of employees with 251 workers compared to females 42. By employment status, most of the workers are full time employees (239 workers) whilst 54 are part time/casual workers. There were more Gambians than non-Gambians for both categories of employees (full and part time). All the part time workers were reported to be Gambians.

Table 4.2.1: Distribution of employees in transport sub-sector by type of contract, nationality and sex, 2018

	Full Time			Part Time/ Casual			Total		
Nationality	**Male**	**Female**	**Sub-Total**	**Male**	**Female**	**Sub-Total**	**Male**	**Female**	**Total**
Gambian	202	33	235	48	6	54	250	39	289
non-Gambian	1	3	4	0	0	0	1	3	4
Total	**203**	**36**	**239**	**48**	**6**	**54**	**251**	**42**	**293**

2.5.2: Seasonal Employees

Seasonal workers account for 181 (61.7 %) of the 293 workers in the transport sub-sector. Out of this, 178 (98.3 %) are paid and 3 are unpaid seasonal workers. There were more males than females among the paid seasonal workers. All the 3 unpaid seasonal workers are males (see Table 4.2.2).

Table 4.2.2: Distribution of seasonal employees in the transport sub-sector by work status and sex, 2018

Seasonal	Male	Female	Total
Paid	157	21	178
Unpaid	3	0	3
Total	**160**	**21**	**181**

4.6: Available Facilities

Tour guide services was the highest proportion of the services Ground Tour Operators offered with 88.5 per cent, followed by transport and tour packaging services with 84.6 per cent and 69.2 per cent respectively. Accommodation and visa services was the lowest proportion of the services offered by the ground tour operators with 11.5 per cent and 3.8 per cent respectively (see Table 4.3).

Table 4.3: Percentage distribution of transport sub-sector by facilities, 2018

Facilities	Per cent
Tour Guide Services	88.5
Tour Packaging Services	69.2
Transport Services	84.6
Accommodation Services	11.5
Visa Services	3.8
Other	0.0

4.7: Services Provided

Table 4.4 shows percentage distribution of services offered by the transport operators' sub-sector. Online booking reservation accounted for the highest proportion of the services offered by the ground tour operators with 88.5 per cent, followed by wireless internet-Wi-Fi with 53.8 per cent and own terminal/garage/dockyard with 34.6 per cent. Stores/specialty shops, sports/recreation/amusement accounted for the lowest proportion of the services offered by the ground tour operators each with 3.8 per cent.

Table 4.4: Percentage distribution of services by transport sub-sector, 2018

Services	Per cent
Online Booking Reservation	88.5
Own terminal/ garage/ dockyard	34.6
Wireless Internet – Wi-Fi	53.8
Electronic Payment	23.1
Foreign Exchange Counter	0.0
Stores/ Specialty Shops	3.8
Sports/ Recreation/ Amusement	3.8
Other	3.8

4.8: Operating Expenses

Table 4.5a shows that expenses on materials and services were the highest (52%) compared to expenses on labour (34%). The other costs (14 %) include cost of electricity and advertisement.

Table 4.5a: Distribution of operating expenses of transport, 2018

Cost	Per cent
Labour	34.0
Material and Service	52.0
Other	14.0

Table 4.5b shows that most of the establishments spent less than GMD500, 000 (65.2%) on their operations, this is followed by expenses between GMD500, 000 – GMD 999,000 with 17.4 per cent.

Table 4.5b: Operating expenses of the transport sub-sector, 2018

Operating expenses (GMD)	Count	Per cent
Less than 500,000	17	65.2
500,000 to 999,000	5	17.4
1 to < 2 million	2	8.7
2 to < 5 million	1	4.4
55 to <70 million	1	4.4
Total	**26**	**100.0**

4.9: Expenditure on Materials and Services

Table 4.6 shows that, 13.4 per cent of the materials and services are imported, while 86.6 per cent are purchased locally. However, out of those imported, purchases of materials accounted for the highest proportion with 24 per cent followed by purchases of services with 8 per cent. Services purchased locally was 92 per cent while materials accounted for 76 per cent and most of the other expenditures were purchased locally (95.7 %) such as electricity and maintenance of the facilities.

Table 4.6: Percentage distribution of expenditure on materials and services by source of purchase, 20I8

Cost	Imported	Purchased locally
Purchases of Material	24.0	76.0
Purchases of Service	8.0	92.0
Other	4.3	95. 7
Total	**13.4**	**86.6**

4.10: Gross Operating Profit

Presented in table 4.7 is the operating profit as a percentage of turnover for the tour operators. It is observed from the table that most of the establishments (30.4%) reported to have gross operating profit between (6% – 10%). This is followed by those whose operating profit is a loss – or between (0%-5%) with 17.4 per cent. Gross operating profit between (46%-50%) and (51%-55%) accounted for the lowest proportions each with 4.4 per cent.

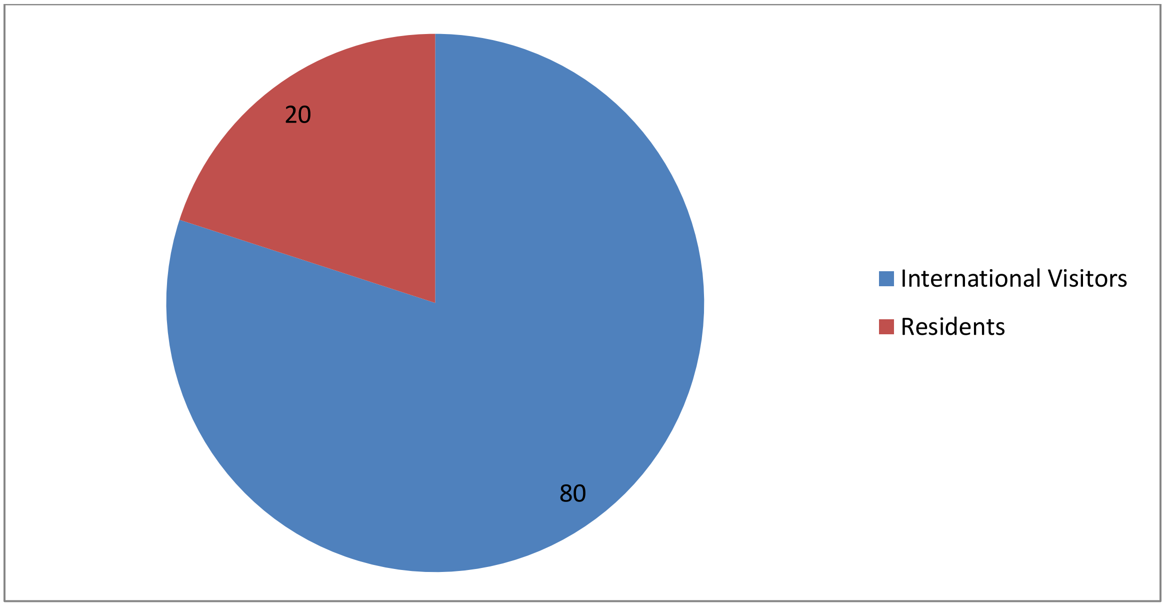
Table 4.7: Gross operating profit as a percentage of turnover, 2018

Gross operating profit	Count	Per cent
Loss - 5%	5	17.4
6% – 10%	8	30.4
11%-15%	2	8.7
16% – 20%	2	8.7
21% – 25%	2	8.7
26% – 30%	2	8.7
31% – 35%	0	0.0
36% – 40%	2	8.7
41% - 45%	0	0.0
46% - 50%	0	0.0
51% - 55%	1	4.4
56% +	1	4.4
Total	**26**	**100.0**

4.11: Turnover from Visitors

The chart below shows that 80 per cent of the turnover for the tour operators was from international visitors while the remaining 20 per cent was from local residents.

Figure 4.4: Percentage distribution of turnover of transport sub-sector establishments by type of visitors, 2018



CHAPTER FIVE: OTHER TOURISM ESTABLISHMENTS

5.0: Introduction

This section focuses on other business establishments like casinos, gaming & betting houses, equipment hirers, and retail shops/ services.

5.1: Duration of Operation

The findings of the survey shows that about 35 per cent of the establishments reported to have been in business for more than a decade. This is followed by those in operation between one to three years (31.1 %). Only 8.4 per cent of these establishments were in operation for less than one year (see Table 5.1).

Table 5.1: Duration of operation, 2018

Years in Business	Count	Per cent
Less than1 year	5	8.4
1 - 3 years	18	31.1
4 - 6 years	9	15.3
7-10 years	6	10.6
More than 10 years	20	34.6
Total	57	100.0

5.2: Turnover of other Tourism Establishment

Establishment's turnover is revenue or income that it receives from its normal business activities, usually from the sale of goods and services to customers during a period of time. During the survey, respondents whose businesses were casinos, gaming & betting houses, equipment hirers, and retail shops/ services were asked their annual turnover for 2018. On average, 66.6 per cent of the establishments reported that their annual turnover was less than half a million dalasis. About 15 per cent of the establishments reported their annual turnover was between GMD500, 000 to GMD 999,000 (see Table 5.2).

Table 5.2: Distribution of turnover, 2018

Turnover (GMD)	Count	Per cent
Less than 500,000	38	66.6
500,000 to 999,000	8	14.6
1 to < 2 million	5	8.1
2 to < 5 million	5	8.6
20 to <30 million	1	2.2
Total	**57**	**100.0**

5.3: Nationality of Main Shareholder(s)

Table 5.3 shows the distribution of the ownership of establishments by nationality. For the casinos, gaming and betting houses, half of the establishments (50%) are owned by non-Gambians. Slightly more than 43 per cent of the shares among the equipment hirers were Gambian owned. Whilst for the retail shops and services nearly 8 in every 10 are owned by Gambians. For all the establishments, there is a joint ownership of the businesses except for retail shops and services.

Table 5.3: Percentage distribution of establishments by nationality of main shareholder(s), 2018

Establishment	Count	Gambians	non-Gambians	Both
Casinos, Gaming & Betting Houses	8	37.5	50.0	12.5
Equipment Hirers	23	43.5	34.8	21.7
Retail Shop/Services	26	76.9	23.1	0.0
Total	**57**	**57.9**	**31.6**	**10.5**

5.4 Employment

5.4.1: Employees in the Other Tourism Establishments

The Tourist season in the country is often characterized by high and low seasons. During high seasons, businesses are often more booming with lots of customers and therefore, more employees are sought after. Overall, 1,024 persons were employed in these establishments. Out of the 1,024 employees in the casinos, gaming & betting houses, equipment hirers, and retail shops/ services, 979 are Gambians and 45 are non-Gambians. By sex, 619 of the employees are males and 405 are females (see Table 5.4.1).

Table 5.4.1: Distribution of employees by type of contract, nationality and sex, 2018

	Full Time			Part Time/ Casual			Total		
Nationality	**Male**	**Female**	**Sub-Total**	**Male**	**Female**	**Sub-Total**	**Male**	**Female**	**Total**
Gambian	480	320	800	106	73	179	586	393	979
non-Gambian	22	7	29	11	5	16	33	12	45
Total	**502**	**327**	**829**	**117**	**78**	**195**	**619**	**405**	**1, 024**

5.4.2: Seasonal Employees

Regarding the status of the seasonal workers, majority of the employees in these establishments were paid workers (456) and 39 were unpaid workers as shown in Table 5.4.2 below. Overall, 495 employees were reported to be seasonal workers and out of which, 456 were paid for their services. For both status of employment, there were more males than females.

Table 5.4.2: Distribution of Seasonal employees by work status and sex, 2018

	Sex		
Seasonal	**Male**	**Female**	**Total**
Paid	284	172	456
Unpaid	23	16	39
Total	**307**	**188**	**495**

5.5: Operating Expenses

Most of the establishments (77%), reported their operating expenses to be less than GMD500, 000. This is followed by establishments whose operating expense is between GMD500, 000 to GMD 999,000 with 10.7 per cent. And establishments whose operating expenses is between GMD 2 million to less than GMD 5 million is about 7 per cent (see Table 5.5).

Table 5.5: Distribution of operating expenses of Other Tourism sub-sectors, 2018

Expenses (GMD)	Count	Per cent
Less than 500,000	44	77.0
500,000 to 999,000	6	10.7
1 to < 2 million	2	4.0
2 to < 5 million	4	6.5
5 to < 10 million	1	1.8
15 to <20 million	0	0.0
Total	**57**	**100.0**

5.6: Expenditure on Materials and Services

Annual operating costs are broadly categorized into two: either purchases of materials (goods) or purchases of services. Overall, slightly more than 78 per cent of the establishments reported that a greater proportion of their materials and services were purchased locally. The proportion of materials and services imported by these establishments was about 22 percent. For expenditure on services, 84.4 per cent was locally purchased and 15.6 were imported. The other costs include payment of electricity and water bills and maintenance of the facilities and majority were done locally (see Table 5.6).

Table 5.6: Percentage distribution of expenditure on materials and services by source of purchase, 20I8

Type of costs	Imported	Purchased locally
Purchases of Material	31.6	68.4
Purchases of Service	15.6	84.4
Other	13.6	86.4
Total	**21.6**	**78.4**

5.7: Gross Operating Profit

Information on gross operating profit as a proportion of annual turnover is shown in Table 5.7 where on average, 38.8 per cent of these establishments reported to have a loss or a profit less than 6 per cent. About 26 per cent of the establishments reported their gross operating profit to be between (6%-10%).

Table 5.7: Gross Operating Profit as a percentage of turnover, 2018

Gross operating profit	Count	Per cent
Loss or 0% - 5%	22	38.8
6% – 10%	14	25.5
11%-15%	5	8.4
16% – 20%	2	4.1
21% – 25%	4	6.5
26% – 30%	5	8.0
31% – 35%	0	0.0
36% – 40%	0	0.0
41% - 45%	1	2.2
46% - 50%	2	4.3
51% - 55%	0	0.0
56% +	1	2.2
Total	**57**	**100.0**

5.8: Turnover from Visitors

Quantifying the proportion of annual turnover of establishments by either local or international visitors could provide important information on what share different visitors economically contribute to the annual turnover. Overall, comparing with their domestic counterparts, international visitors contribute slightly more than 67 per cent of annual turnover. Most of the equipment hirers (89.4%) and retail shops/services (62.8%) reported to have more of their turnover from international visitors, whilst for casinos, gaming & betting houses 78.1 per cent of their revenue was from the residents (see Table 5.8).

Table 5.8: Percentage distribution of turnover of establishments by type of visitor, 2018

Establishment	International Visitors	Residents
Casinos, Gaming & Betting Houses	21.9	78.1
Equipment Hirers	89.4	10.6
Retail Shop/Services	62.8	37.2
Total	**67.4**	**32.6**

CHAPTER SIX: SMALL TOURISM ESTABLISHMENTS

6.0: Introduction

This chapter discusses the contribution(s) of the small tourism establishments such as taxi drivers, tour guides, tourist attraction and bird watchers. The chapter presents the composition, duration of operation, turnover and the workforce of these establishments. The small tourism establishments are very essential in the overall promotion and productivity of the Tourism sector because they served as both the ‘pull-and-push factors’ for most tourists visiting The Gambia. Hence, the existence of the numerous tourist attraction sites, the number of tourist taxi drivers, tour guides, tourist attraction and bird watchers are crucial ‘drivers’ in the Tourism sector.

Table 6.1 shows the distribution of the establishments by type. Tourist taxi drivers accounted for the highest proportion of the establishments covered (89.2%), followed by tourist guides and birdwatchers with 6.8 per cent and 2.7 per cent respectively.

Table 6.1: Distribution of small tourism establishments, 2018

Type of Establishment	Count	Per cent
Tourist attraction	1	1.4
Tourist taxi	66	89.2
Tour guide	5	6.8
Birdwatcher	2	2.7
Total	**74**	**100.0**

6.1 Duration of Operation

Information on when the establishments were established was collected during the survey. The findings of the survey shows that 63.5 per cent of the establishments have been in operation for more than 10 years, 18.9 per cent were in operation between 7 – 10 years whilst 2.7 per cent of the establishments have been in existence for less than 1 year (see Table 6.2).

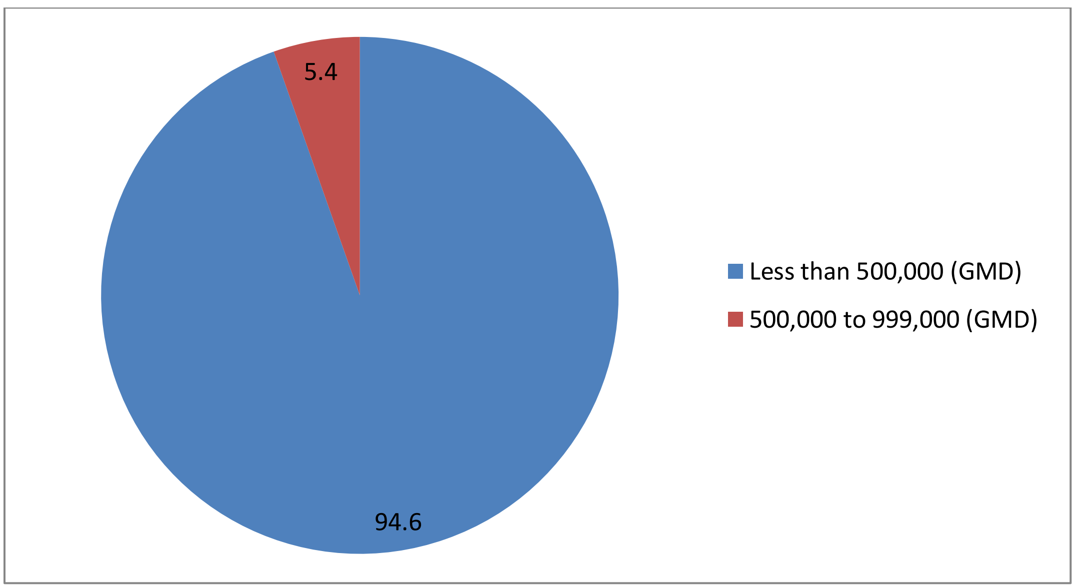
Table 6.2: Duration of operation, 2018

Years in Business	Count	Per cent
Less than1 year	2	2.7
1 - 3 years	4	5.4
4 - 6 years	7	9.5
7 – 10 years	14	18.9
More than 10 years	47	63.5
Total	**74**	**100.0**

6.2: Turnover of Small Tourism Establishments

Figure 6.1 shows the percentage distribution of turnover of establishments. The data shows that about 95 per cent of the establishments have turnover less than GMD500, 000 while only 5.4 per cent of the establishments have turnover between GMD500, 000 to GMD999, 000.

Figure 6.1: Distribution of turnover, 2018

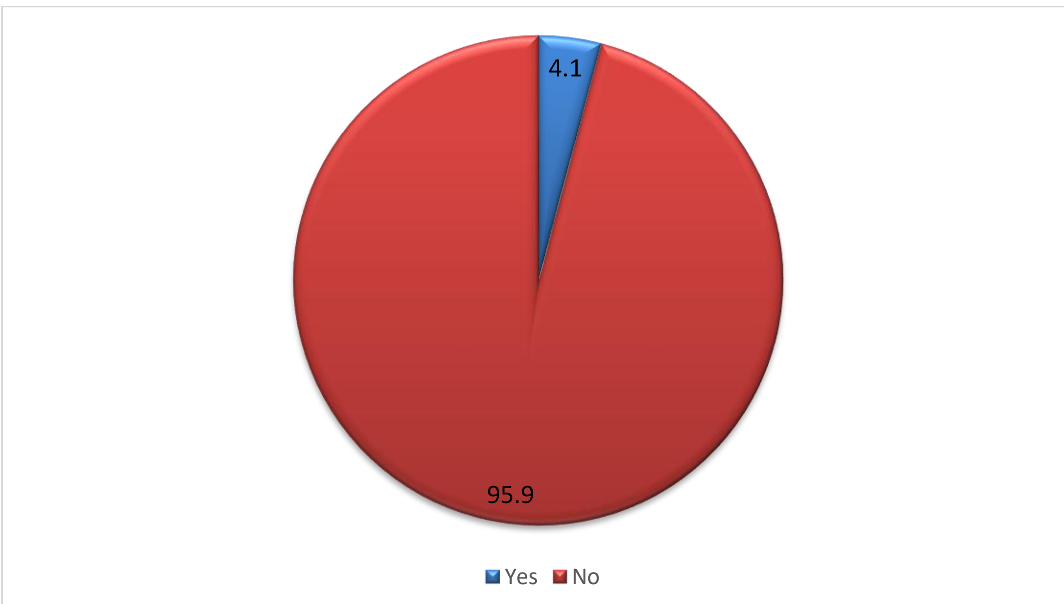


6.3: Employment

6.3.1: Establishments with Employees in the Small Tourism Establishments

Given that in this sample, majority of small tourism establishments are taxi drivers who are most of the time not likely to have employees. Information on whether the establishments have employee(s) was collected. Figure 6.2 shows that about 96 per cent of the establishments reported that they have no employee – this is due to the fact that tourist taxi drivers accounted for the highest proportion (89.2 %) of the small tourism establishments, who are mostly sole operators.

Figure 6.2: Percentage distribution of establishments that have employees in their business within the small establishments, 2018



6.3.2: Employees of the Small Tourism Establishments

Table 6.3 shows the distribution of employees in 3 of the 74 small tourism establishments covered during the survey. The findings of the survey shows that 47 people are employed in these establishments of which 46 are full time employees and only one was a part time/casual worker. In addition, out of the 47 employees 45 were males and only 2 were females. There is only one paid male seasonal employee in the small tourism establishments.

Table 6.3: Distribution of employees in small tourism establishments by type of contract, nationality and sex, 2018

Nationality	Full Time			Part Time/ Casual			Total		
	Male	Female	Sub-Total	Male	Female	Sub-Total	Male	Female	Total
Gambian	44	2	46	1	0	1	45	2	47
non-Gambian	0	0	0	0	0	0	0	0	0
Total	**44**	**2**	**46**	**1**	**0**	**1**	**45**	**2**	**47**

6.5: Gross Operating Profit

Table 6.4 below shows the proportion of the gross operating profit as percentage of turnover for the small tourism establishments. The findings of the survey shows that 23 per cent of the establishments have their gross operating profit as a loss or between (0%–5%) of their turnover whilst 32.4 per cent of the establishments have their gross operating profit between (6%–10%) of their turnover. Moreover, 1.4 per cent of the establishments have their gross operating profit between (51%–55%) of their turnover.

Table 6.4: Gross operating profit as a percentage of turnover, 2018

Gross operating profit	Count	Per cent
Loss or 0% - 5%	17	23.0
6% – 10%	24	32.4
11%-15%	9	12.2
16% – 20%	7	9.5
21% – 25%	3	4.1
26% – 30%	2	2.7
31% – 35%	3	4.1
36% – 40%	2	2.7
41% - 45%	4	5.4
46% - 50%	2	2.7
51% - 55%	1	1.4
Total	**74**	**100.0**

CHAPTER SIX: RECOMMENDATIONS

Given the limitations of the survey, it is highly recommended that a complete listing of all the establishments in the Tourism sector be done before a subsequent survey is conducted. This would greatly help in the sampling and weighting for better results in the upcoming Tourism surveys.

It is also necessary for GT Board to update the total number of establishments registered under them and group them as per sub-sector; this will ease the grouping and sampling especially in the event that sampling is to be done proportionately as per sub-sector.

It is recommended for the survey to be conducted on regularly basis maybe every three years. This could enable the regular update of the Tourism Satellite Account and in measuring the contribution of Tourism to the economy. It would also enable GT Board to know the number of establishments out of business.