
SENEGAL TOURISM SECTOR STUDY
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Abstract

In 2000, Senegal's foreign exchange receipts from tourism ranked the sector second after fishing and well before groundnuts and phosphates. The Petite Côte is the principal tourist region, but other regions also have a variety of first-rate natural and cultural assets. While tourism in Senegal is growing modestly, the country is losing market share in an expanding international and regional market. Yet, for the foreseeable future, Senegal may continue to be dependent on tourism for significant contributions to foreign exchange earnings, employment and tax generation, and as a regional development tool and catalyst for overall economic growth. Joint public-private sector deliberations recently set a target for Senegal of 1.5 million visitors by 2010, which would require a 300% increase over current tourist arrivals and a more than doubling in hotel beds from 2000 to 2010. Related objectives are to raise the quality of the tourism product to appeal to a higher-income market, ensure that tourism benefits local communities and effectively reduces poverty, and conserve the natural

resources on which tourism is based. This paper examines current sector-specific constraints, as well as the adequacy of policies, institutions and financing to help achieve the expansion. Recommendations are formulated as a vision of what can be achieved in each of three distinct five-year periods. The final outcomes are expected to include: improved tourism capacity at all levels of the public and private sectors, with enhanced dialogue between them; better policy formulation and physical planning for and improved economic, environmental, cultural and social management of the tourism sector; greater numbers of Senegalese involved at all levels of tourism; improved living standards for poor Senegalese as a result of targeted interventions and the adoption of pro-poor tourism policies by the public and private sectors; a tourism sector that has strong backward and forward linkages within the economy and is a catalyst for growth; and, finally, Senegal becomes a significant, competitive and internationally recognized tourism destination.

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Senegal Tourism Sector Study

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SENEGAL TOURISM SECTOR STUDY

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Acronyms

APITS	Association pour la promotion de l'industrie du tourisme au Sénégal
APIX	Agence nationale chargée de la promotion de l'investissement et des grands travaux
CI	Conservation International
CIDA	Canadian International Development Agency
CRI	Campements ruraux intégrés
CSPD	Commission sénégalaise port de Dakar
DFID	UK Department for International Development
EU	European Union
FIEFI	Fonds d'investissement pour les entreprises favorables à l'environnement
GDP	Gross Domestic Product
GRCC	Groupe de réflexion pour la compétitivité et la croissance
ISO	International Standards Association
LDI	Landscape Development Interventions
MTTA	Ministère du tourisme et des transports aériens
PCR	Project Completion Report
PRSP	Poverty Reduction Paper
RAM	Royal Air Maroc
RFE	Rain Forest Expedition
SAPCO	Société d'aménagement de la Petite Côte
SAVT	Syndicat des agences de voyages et de tourisme du Sénégal
SME	Small and Medium Scale Enterprises
SPIHS	Syndicat patronal des industries hôtelières du Sénégal
TSA	Tourism Satellite Account
UEMOA	Union économique et monétaire ouest africaine
UNDP	United Nations Development Program
UNESCO	United Nations Educational, Scientific and Cultural Organization
USAID	United States Agency for International Development
WTO	World Tourism Organisation
WWF	World Wildlife Fund
ZIE	Zones d'investissement écotouristiques

PREFACE

The preparation of this study was overseen by Mr. Iradj Alikhani (AFTPS) and the diagnostic work was undertaken by Ms. D. Elizabeth Crompton and Mr. Iain Christie (consultants) as part of the appraisal of the Private Sector Investment Project (P051609) in February 2002. Mr. Philip English (WBI) was the peer reviewer. The work was partly funded by a PHRD trust fund (TF 025641). The detailed review was requested by and benefits from the inputs of private and public sector counterparts in Senegal, notably APIX (the Investment Promotion Agency) and members of the *Groupe de réflexion pour la compétitivité et la croissance* (representing a broad cross section of the public and private sector responsible for tourism) and of Performance Management Consulting, who undertook fundamental analysis of the tourism sector in 2000 and 2001. Donors represented in Senegal shared information and previous studies with the consultants.

This sector study, which builds on the earlier study “Tourism in Africa”, written by the same authors and published in the Africa Region Working Paper Series (Number 12), develops a country level tourism strategy for Senegal in support of the Government's poverty objective of tripling the level of tourism by the end of this decade. The sector is thus expected to be an important contributor to economic growth in the Senegal PRSP (the national poverty reduction strategy paper), discussed by the World Bank Board in December 2002.

The report argues that in order to reach Senegal's ambitious objectives for tourism considerable prior institutional capacity building and preparatory work is required, and that the sector's growth will need to be underpinned by an effective private-public partnership. The study analyses options to address sector-specific constraints and identifies key policy and institutional reforms related to making the country level tourism strategy operational.

SENEGAL TOURISM SECTOR STUDY

EXECUTIVE SUMMARY

In 2000, receipts of FCFA 96.8 billion (US\$129 million), ranked the tourism sector in Senegal second after fishing and well before groundnuts and phosphates. Tourism is estimated to have generated 12,000 jobs directly and 18,000 indirectly and contributed 2.5 % of GDP, though these statistics are based on data that appear to underestimate total jobs generated and, possibly, tourist expenditures. The sector has provided the base for economic growth in the Petite Côte, which is the principal tourist region, and has the potential to be a development catalyst in other regions with tourist assets.

Senegal has a variety of first-rate natural and cultural assets that compete favorably with those on offer elsewhere. Resort assets are the principal attraction in Europe's winter and these assets are not fully exploited. Furthermore, Senegal's variety of birds, big game fishing, scenic areas, scuba diving potential, a rich traditional culture and vibrant arts scene, wildlife and attractive handicrafts provide the potential for diversification and expansion of the tourism product. The country's appeal as a tourism destination for Europeans is enhanced by Senegal's proximity to Europe and warm climate in Europe's winter, with the added advantage of no jet lag on a north-south route. Senegal can, therefore, exploit assets that tourists associate with Africa, such as wildlife, even if the variety, habitat and facilities are not as good as elsewhere on the continent, because for many tourists this will be their first visit to or only destination ever visited in sub-Saharan Africa.

Recent history shows a sector that is growing modestly but is also losing market share in an expanding international and regional market. Between 1975 and 1997, Senegal dropped from 7th to 16th in the World Tourism Organisation (WTO) ranking of the top twenty tourist destinations in Africa based on tourist arrivals. While the annual growth rate has increased from 1996 to 2000 to 6.7% (the last year for which data are available), the average annual growth rate in visitor numbers for the decade has been 4.7%. This compares with WTO's estimate that during the past fifteen years the numbers of international tourists worldwide more than doubled to 698 million and arrivals of tourists to Africa (defined as the entire continent, i.e., including North Africa) increased by 177% from 9.7 million to 26.9 million, or at an average annual growth rate of 7%.

Accelerated growth in tourist arrivals from 1996 to 2000 is largely attributable to demand from the French market. French visitors, which constitute 50% of all tourists, have increased at an annual rate of 7% during the 1996 to 2000 period compared to the decade rate of 2.7%. African visitors constitute 25% of Senegal's arrivals, but appear to be mainly business visitors as they are concentrated in Dakar and have a short stay. There was a 10% growth in arrivals of African visitors for the decade, which slowed to 7.6% for the five years ending in 2000.

Weaknesses in demand are shown by the short average length of tourist stay (3.4 nights), the dependence on one source market (50% from France), the apparent low rate of repeat tourism (tentatively estimated at 5%) and a relatively defined peak season (over 23% of bednights are sold in January and February). According to industry sources, profitability of many hotels has been, at best, marginal, which is borne out by the above demand characteristics, by low average occupancy rates (35%) and by a high

dependence on international tour operators, which can depress prices particularly if the hotel sector is not competitive internationally. Lack of profitability leads to deterioration in quality, which, in turn, leads to lack of competitiveness. While the competency of the local professional sector is not in question, its comparative experience, which could lead to greater innovation, is. This is a direct result of over dependence on one source market. These constraints affect the quality and, therefore, the competitiveness of Senegal's tourism product in the international tourism market.

The cities of origin, frequency and cost of air access to Senegal is a major issue for the country and one over which it has limited control. Senegal's tourism sector was adversely affected in 2001 not just by September 11 and its aftermath but by the termination of operations by three major airlines serving Senegal (Air Afrique, Sabena, Swissair). Air access to and from Europe was maintained by daily Air France flights and the initiation of regular flights to Paris (via Rabat) by *Air Sénégal International*, as well as the greater use of charters. In May/June 2002, Senegal again began to be served by a restructured Swissair and by the Belgian airline that emerged from the reorganization of Sabena.

Other areas of concern are land speculation, sub-optimal land management, paucity of financing combined with inappropriate terms of lending for the sector, and to varying degrees, depending on the region, inadequate infrastructure. The increase in the value added tax (VAT) to 18% in late September 2001 concerns the private tourism sector because of its impact on Senegal's international competitiveness.

To be sustainable, any expansion of tourism in Senegal's sensitive ecological areas requires a review of current land-use planning practices and the establishment of environmental regulations, particularly for the coastal zone. (Senegal does not have an Integrated Coastal Zone Management Plan.) There is little awareness in Senegal of the growing demand, particularly from Europeans, for "green" tourism. To date, no hotel in Senegal has earned any international certification of good environmental management, e.g., ISO 14,001, Green Globe, in contrast to several rival resort destinations that derive marketing, as well as environmental, benefits from certification.

Two major cultural areas—Ile de Gorée and St. Louis—have received and are receiving external assistance for the protection of their assets and to attract tourists. Relatively little is known about the state of Senegal's other built cultural assets or about the living traditions that could induce tourists to visit local communities. Currently, though, the Government is exploring ways to protect the livelihoods of Senegal's internationally renowned local musicians and artists through legislation to protect their access to royalties. Senegal's music is well known in Europe, particularly France, and, consequently, enhances the country's image as a tourism destination. Senegalese painters have also made their mark on the international arts scene. An attractive range of local handicrafts raises tourist expenditures and effectively distributes these expenditures to local communities.

One of the strengths of tourism can be its backward and forward linkages within an economy, and, concomitantly, the indirect as well as direct employment it generates. Case studies from other countries in Africa and around the world illustrate the potential for targeted interventions to alleviate poverty through tourism. An essential condition, however, is that the mainstream tourism sector be healthy and growing for these linkages to take root and for local communities to benefit. As yet, little attempt has been made in Senegal to target "pro-poor" tourism and specific processes for consultation with local people or to incorporate local people as stakeholders in the tourism product have not been formulated.

Despite the economic importance and potential of the tourism sector in Senegal, the services that the Government used to provide have declined over the past few years and for several months in 2001 the Ministry of Tourism was actually abolished. A tourism strategy is only now being formulated. The contribution, impacts and operational needs of the sector need to be better defined if there is to be a

consensus within Government about appropriate policies for the sector. Dialogue between the public and private sectors is intermittent and, currently, strained over the use of funds from a tourism tax to fund promotion and marketing. Promotion and marketing of tourism at the critical country level is weak and under-funded compared with competitors, though individuals vigorously market their hotels and tourist services internationally.

For the foreseeable future, Senegal may continue to be dependent on tourism for significant contributions to foreign exchange earnings, employment and tax generation, and as a regional development tool and catalyst for overall economic growth. Participants at the recent *Journées nationales de concertation*, confirmed decisions made during public-private consultations in 2000 that Senegal should aim for a target of 1.5 million visitors by the year 2010. This target implies an increase of 300% in tourist arrivals in the ten-year period, i.e., a 14% average annual rate of growth, compared with 4.7% annually during the decade ending 2000 and 6.7% annually from 1996 to 2000. Those targets also require adding 20,000 beds throughout the country in areas of tourism potential -- a more than doubling in hotel beds in the ten-year period from 2000 to 2010. A related objective is to raise the quality of the tourism product in order to appeal to a higher-income market. To achieve these targets, Senegal will have to expand demand by tourists considerably and will have to attract substantial tourism-related investment.

Based largely on the quality of its assets, Senegal can, realistically, expect to achieve considerable expansion of demand. To attract the investments that will be necessary to accommodate the market expansion and the external assistance to help expand, diversify and support the tourism product, Senegal needs to create a sound policy framework for tourism. Such policies can be expected to improve the general business environment for other sectors too. The formulation of appropriate policies for the sector requires an ongoing dialogue between the public and private sectors and local stakeholders, and consensus within government about the operational requirements of and benefits to be obtained from an expanded and sustainable tourism sector. Specialized technical support will be required to achieve the corollary objective of improving the quality of the tourism product.

The ambitious targets for the year 2010 provide Senegal with a quantitative goal for the sector. Debate about whether or not the targets can actually be achieved by that date is less important than putting in place a road map that will achieve substantial growth. The following plan for the sector proposes three five-year stages — transition, expansion and consolidation. The consolidation stage from 2011 to 2015 takes the planning past the 2010 target date for the arrival of 1.5 million visitors. The plan is strategic rather than quantitative, giving it the flexibility to adapt to whatever level of tourists Senegal attains during the plan's implementation. The three plan periods are summarized below.

The Vision for the Tourism Sector

A Transition Period- 2002-2006

The review of the current state of the tourism sector suggests that Senegal cannot achieve its targets unless it introduces substantial changes in the way the tourism sector functions. In other words a “step” change, rather than minor adjustments, is required in policy formulation and dialogue between the public and private sectors, planning measures, technical capacity, and in the quality of institutions for marketing and promotion and in data management. An infusion of technical support to raise the quality, efficiency and sustainability of tourism will be needed. A main objective will be to ensure that Senegal achieves a balance appropriate to market demand in its mix of products on offer and that each is competitive in value in the international market. Growth will occur during this transition period as the quality of the product improves but accelerated growth will only be achieved once a major investment promotion campaign is undertaken at the end of the period in preparation for the expansion stage.

During this stage, Senegal needs to start Master Plans for its main existing or potential tourism areas to enhance the overall quality and image of the Senegalese tourism product. The objective of Master Plans is to conserve and enhance the value of each of the areas through environmental management plans, to create synergy between them, to make them more attractive for investors interested in quality accommodation and services, and to incorporate local communities in the tourism product. Studies of crosscutting themes that are common to all the areas are needed to help formulate policies for tourism at the national level, concerning, for example: airline capacity and access; taxation and incentives; pricing and financing mechanisms; protection of natural and cultural assets; etc. To compete successfully with rivals, Senegal needs an institution, such as a *Maison* or *Office du Tourisme*, that is responsible for a national marketing and promotion campaign and that is also a venue for a dialogue and cooperation between the public and private sectors and a center for information about the tourism sector in Senegal, including a national website and database.

Capacity building for stakeholders, including the Ministry of Tourism and the private sector, will be essential during this transition stage. At the end of this stage, a follow-up to the *2002 Journées nationales de concertation* would leave in place a five-year strategy for development of the sector during the expansion stage of the vision. Also at the end of this stage, investment proposals derived from the Master Plans and studies could be presented to a forum of potential investors and donors for financing, in preparation for the expansion stage.

The Expansion Stage - 2007-2011

After the policy and planning initiatives undertaken in the Transition period, this expansion stage should begin with an influx of investment as a result of the investment forum that ended the first stage. The forum should also have attracted financing for tourism-related infrastructure and technical support for SMEs to help them link into the tourism supply chain. During this stage the benefits from tourism should grow and should also be distributed among a broader range of beneficiaries. Under joint public-private management and with external assistance, data collection could be started and a methodology designed for preparation of a tourism satellite account that would provide the sector with a good management tool to track its contributions, impacts and linkages.

The tourism strategy formulated during the Transition period should be kept under review to ensure its continuing relevance. The feedback from ongoing visitor surveys would guide the strategy as well as investment plans. Marketing and promotion campaigns undertaken in several source markets should continue. Results, in terms of the addition of a more diversified and higher-income clientele, as well as higher overall numbers of tourists, should become evident during this stage of the plan.

The public and private sectors would jointly evaluate management systems for the sector and would keep themselves informed about innovation in the sector elsewhere in the world. A number of issues should be kept under continuous review and appropriate action taken if or when necessary: the adequacy and competitiveness of air access from major tourist markets; analysis of infrastructure needs and its financing; monitoring of tax and incentive legislation to ensure that Senegal's business climate attracts investors and allows entrepreneurs to make reasonable profits, while also ensuring that the State covers its expenditures for the tourism sector; access of local entrepreneurs to financing, both for new investment and for improved maintenance, remodeling and refurbishing of existing accommodation; training needs throughout the sector, including the study of the English language; and the potential costs and benefits of the cruise market.

Controlled expansion would be encouraged through Master Plans for new areas with tourism potential, with a focus on using tourism as an economic base in less developed regions. Pro-poor policies should continue to target poverty alleviation through tourism. Cultural assets, including built and living

cultural assets at the community level, as well as the current products of talented musicians, artists and artisans, including handicrafts, could be identified and promoted as part of the tourism product to enrich it and to expand the beneficiaries of tourism. Based on evaluations done in the Transition period, Senegal's parks in tourist areas could be made accessible to tourists under management plans that provide financing for and protect the biodiversity and wildlife of the parks and bring benefits to surrounding communities. Environmental goals of zoning, physical planning and coastal zone management, should be pursued and go hand in hand with achievements by the hotel sector in obtaining green certification. At this stage, the Government could support the creation of regional tourism markets and also introduce incentives for regional and domestic tourists to use accommodation and tourist facilities during the shoulder and low seasons in Senegal.

A new Investor/Donor forum geared to high-quality hotels, tourist facilities and services and tourism-related infrastructure, including infrastructure for communities in tourist areas, should conclude this expansion stage.

The Consolidation Stage- 2011-2015

Senegal should now be a competitive international tourism destination. As a result, Senegal should have greater bargaining power with international tour operators, airlines and cruise ships as to the prices it charges for use of its facilities. The improved business climate and transport access will benefit the entire economy. The public and private sectors will work hand-in-hand to address constraints and introduce innovations to keep the business environment conducive to investment and the sector competitive. Tourism will be an important, but not exclusive, economic base in more regions in Senegal and more communities and local entrepreneurs will be linked into the tourism sector and obtain direct benefits from it. Through the development of a more diversified tourism product that includes cultural and natural assets and local communities and a wider range of source markets, seasonality should be less defined than in 2002 and the average length of stay should have lengthened, with a directly positive impact on occupancy levels in hotels. A review of the current state of the sector with identification of bottlenecks, constraints and potential should be undertaken at the mid-point of this stage. The social, cultural and economic impacts of tourism should be assessed. The results should be incorporated into a new five-year strategy for the sector with recommendations and implementation measures.

The *expected outcomes* of these three stages will be:

- Improved tourism capacity at all levels of the public and private sectors;
- Enhanced dialogue and cooperation about tourism between the public and private sectors;
- Better policy formulation and physical planning for and improved economic, environmental, cultural and social management of the tourism sector;
- Greater numbers of Senegalese become involved in tourism at all levels;
- Improved ways of life and incomes for poor Senegalese previously marginalized from tourism as a result of targeted interventions and the adoption of pro-poor tourism policies by the public and private sectors;
- A tourism sector that has strong backward and forward linkages within the economy, and generates high levels of employment, taxes, and foreign exchange revenues and diversifies the economic base for more and more regions in Senegal; and
- Senegal becomes a significant, competitive and internationally recognized tourism destination.

Senegal Tourism Sector Study

TOURISM IN SENEGAL TODAY

In 2000, official estimates of receipts of FCFA 96.8 billion (US\$129 million), ranked the tourism sector second after fishing and well before groundnuts and phosphates. Tourism is estimated to have generated 12,000 jobs directly and 25,000 indirectly, which in total is about 14% of paid employment in Senegal, and contributed 2.5% of GDP. The sector has provided the base for economic growth in the Petite Côte, which is the principal tourist region, and has the potential to be a development catalyst in other regions with tourist assets. According to official statistics, Senegal received 389,433 non-resident visitors in 2000 and has 18,340 beds in all categories of tourist accommodation.

Despite the economic importance and potential of the tourism sector in Senegal, the services that the Government used to provide have declined over the past few years and for several months in 2001 the Ministry of Tourism was actually abolished. Currently, the public sector lacks the capacity to manage this cross-sector activity. A tourism strategy has just been formulated. The contribution, impacts and operational needs of the sector need to be better defined if there is to be a consensus within Government about appropriate policies for the sector. While the competency of the local professional sector is not in question, its comparative experience, which could lead to greater innovation, is. This is a direct result of over dependence on one source market. Dialogue between the public and private sectors is intermittent. Promotion and marketing of tourism at the critical country level is weak and under-funded compared with competitors, though individuals vigorously market their hotels and tourist services internationally.

There is little awareness in Senegal of the growing demand, particularly from Europeans, for “green” tourism. Two major cultural areas—Ile de Gorée and St. Louis—have received and are receiving external assistance for the protection of their assets that are important components of the tourism product. Relatively little is known about the state of Senegal’s other built cultural assets or about the living traditions that could induce tourists to visit local communities. As yet, little attempt has been made in Senegal to target “pro-poor” tourism and specific processes for consultation with local people or to incorporate local people as stakeholders in the tourism product have not been formulated.

NATIONAL EXPECTATIONS OF THE TOURISM SECTOR

The *Groupe de réflexion pour la compétitivité et la croissance* (GRCC) places “tourism, culture and leisure” as one of the four pillars of the Senegalese industry in the twenty-first century. By the year 2020, Senegal should become “an important cultural and leisure site and a tourism destination of international renown” not just in West Africa, but also in the continent of Africa. The cluster of components of this successful tourism sector will be:

- Resort tourism, with a diversification into beach use and beach sports, sea-related health treatments, golf, cruises, sports fishing;
- Nature tourism with a diversification towards ecotourism, and photo, fishing and hunting safaris;
- Business tourism, including meetings, seminars, congresses, fairs, incentive travel; and

- Cultural tourism, historic and religious sites, and living cultures.

Participants at the recent *Journées nationales de concertation* (Days of National Consultation about Tourism), organized by the Ministry of Tourism, confirmed decisions made during public-private consultations in 2000 that the target for Senegalese tourism should be 1.5 million visitors by the year 2010. This target implies an increase of 300% in tourist arrivals in the ten-year period, i.e., a 14% average annual rate of growth, compared with 4.7% during the decade ending 2000 and with 6.7% from 1996 to 2000. Those targets also require adding 20,000 beds throughout the country in areas of tourism potential -- a more than doubling in hotel beds in the ten-year period from 2000 to 2010. A related objective is to raise the quality of the tourism product in order to appeal to a higher-income market. To achieve these targets, Senegal will have to expand demand by tourists considerably and will have to attract substantial tourism-related investment. The analysis of tourism demand that follows is done against this backdrop.

TOURISM ASSETS

An assessment of tourist assets is necessary to understand the potential for expansion of tourism in Senegal. Resort assets provide the main attraction for tourists, together with the culturally important Ile de Gorée. Senegal has not yet exploited all its resort assets and non-resort assets are only marginally exploited. The principal tourist attractions in Senegal are described below.

Dakar, the capital, attracts business travelers and international meetings principally related to African and developing country issues because of its good convention facilities. The international airport is near Dakar, so that the capital benefits from being the country's entry point and tourism distribution center. Dakar is becoming a center for fashion, leather goods and furniture. A popular Carnival takes place annually, as well as the Paris-Dakar motor race. *The Ile de Gorée*, the former slave holding center, is a World Heritage Site¹ and a short boat trip from Dakar.

The Petite Côte in the Thiès region, the main resort area, principally based around Saly where there is potential for expansion, has excellent beaches, relatively calm seas and bays. The principal season for resort tourism is the contrasting climate in Europe's winter. Big game fishing is an important component in the area's attractions². The few hotels that specialize in fishing services are able to extend the resort season, which would normally close in April, up to October and even November in some years.

St. Louis, on the northern coast, was founded in the 17th century and was the first French settlement in Africa. The city became the first capital of Senegal in the early nineteenth century. In 2000, the Island of St. Louis was declared a World Heritage Site because of its impressive colonial architecture. The city is a cultural center and is also near good beaches. A jazz festival is held annually.

Fatick. The Siné Saloum Delta lies south of the Petite Côte, covering the Fatick and Kaolack regions up to the Gambian border. The Delta is formed where the seasonal Sine and Saloum rivers meet the tidal waters of the Atlantic Ocean. The magnificent scenery comprises mangroves, lagoons, open forests, dunes and sand islands. Several monkey species inhabit the Delta and the varied habitat attracts pelicans, flamingos and other bird life. The ecological importance of the area is demonstrated by its

¹ World Heritage Sites are natural or cultural sites of "outstanding universal value" identified by individual countries and recognized by the members of the United Nations Educational, Scientific and Cultural Organization (UNESCO).

² The principal fish caught, with the maximum weights in the last two seasons in brackets, are: blue marlin (145 kg.), sailfish (62 kg.), and *dorades coryphènes* (between 10 and 20 kg. each). At least one-third of the sailfish catch was released under "tag and release" rules.

designation as a National Park and an International Biosphere Reserve³, while the wetlands have Ramsar status⁴. Fishing is the main economic activity in the villages. Tourists visit for general ecotourism and for the niche markets of fishing, birding and adventure tourism, and to a lesser extent, hunting, which is classified as tourism because it entails foreigners visiting another land. The Fatick administrative area covers 7,935 sq. km. or 4.4% of Senegal.

The Parc National des Oiseaux du Djoudj. The Djoudj national park, 60 km north of St. Louis, is designated as a UNESCO World Heritage Site and the wetlands have Ramsar status. It is one of the most important wetland bird sanctuaries in the world, partly because it is one of the first places south of the Sahara with permanent water. The park is only 16,000 hectares in size, but is adjacent to Diawling National Park in Mauritania and lies north of the much larger 60,000 hectare Maka Diama Game Reserve in the southern part of Djoudj, which provides important wintering grounds for migratory birds. Djoudj is most famous for its flocks of pelican and flamingo, but around 3 million birds pass through the park annually and almost 400 species have been recorded.

The Grande Côte refers to the coastline of Senegal north of Dakar and the Cap Vert peninsula. From its starting point at Kayar to the mouth of the River Senegal near St. Louis the coast is one long uninterrupted beach. The area is much less developed than the Petite Côte because of high winds and rough seas. A prime consideration is that this coastal area contains fragile ecological areas, such as the Niayes, a series of small depressions located among the coastal sand dunes north of Dakar that contain high plant biodiversity.

Tambacounda, in the far south-east of the country, combines assets that attract different niche markets: nature, wildlife and adventure tourism, hiking and biking, and cultural tourism (built and living cultures). This is the principal area for hunting in Senegal. For many years the main attraction in the region has been the Parc National de Niokolo-Koba, Senegal's largest national park and one of the largest in West Africa. The Park is designated as a World Heritage Site and as an International Biosphere Reserve. Some 350 species of bird and about 80 species of mammal reside in the park, including lion, leopard and the last elephants (estimated at 20) remaining in Senegal.

Casamance, the region of Senegal south of the Gambia, counts among its attractions *Cap Skiring*, which has the best beaches in Senegal and, according to some travel writers, among the best beaches in Africa; *the River Casamance*, a maze of creeks, lagoons, islands and palm groves, which can be explored by *pirogue*, or by foot and bicycle, and which provides a temporary home during the dry season to millions of migratory birds; and Ziguinchor, the riverside capital of Casamance. Because its people are Diola in their majority and non-Muslim, the region has distinctive traditions from the rest of Senegal and attracts cultural tourism. Unfortunately, tourism to Casamance has been seriously disrupted for the past two decades by civil unrest and consequent security problems for tourists. Currently, tourism is confined to the beautiful area of Cap Skiring, which is served directly by flights from Paris or Dakar, and where the Club Med, among other well-known resorts, is established.

Cultural Assets. In addition to its significant built historical sites, such as Ile de Gorée and Saint Louis, whose World Heritage designation even attracts tourists ignorant of their history, Senegal has other less known historical and cultural sites, though these have not been catalogued systematically. Senegal is

³ Biosphere Reserves are terrestrial and coastal environments that have been internationally recognized for conservation and research on the interactions between humans and the environment. A major goal of the program, which is managed by UNESCO (see footnote 1), is to establish a network of representative samples of the world's biogeographical provinces, i.e., areas characterized by distinctive groups of flora and fauna.

⁴ Signatories to the Convention on Wetlands of International Importance Especially as Waterfowl Habitat that met in Ramsar, Iran in 1971 are required to designate wetlands for inclusion on the List of Wetlands of International Importance, maintained at the Conservation Monitoring Centre at IUCN (The World Conservation Union).

also a destination and/or part of a circuit for descendants of African slaves in the USA, the Caribbean and Brazil, who are searching for their ancestral roots. The country's varied living cultures are a major tourist asset, though they can be incorporated into the tourism sector only with the full agreement, participation and understanding of the local people. Likewise tourists need to be educated about the social, cultural and religious mores of the largely Moslem country they are visiting.

Senegal is on the world's cultural map through its music, which has won many international awards and is especially popular in Europe. Senegalese paintings and sculpture are also sought after. Senegal holds only three festivals or special events regularly, including the jazz festival in St. Louis, as compared to Tunisia's twenty-six and Morocco's nineteen.

Natural Assets. The Government of Senegal has created a number of National Parks for wildlife and biodiversity protection. Although the wildlife is not world class, Senegal is the nearest destination in which Europeans can experience African game. Imports of game from eastern and southern Africa have been successfully incorporated into the local habitat, including breeding of the animals, so that Senegal can increasingly feature more exotic wildlife in natural settings. The natural scenery of the areas described above lends itself to photo safaris, as well as adventure travel.

The wildlife is not competitive in the big-game international hunting market, which is a high-profit niche market, because of the lack of variety of big game and of safari facilities compared to east and southern Africa. Nevertheless, it provides middle-income European hunters with an experience of new animals and new habitat at lower cost and greater proximity. Hunting and protection of wildlife is regulated under legislation last issued in 1986 (*Code de la chasse et de la protection de la faune*. Loi No. 86-04 du 24 janvier 1986 et Décret No. 86-844 du 14 juillet 1986).

Summary Assessment of Potential. Proximity to and reverse climate with Europe are Senegal's most important tourism assets, with the added advantage of no jet lag on a north-south route. The absence of extreme climatic conditions year round in Senegal is another attraction. Senegal's climate and resort assets in the Petite Côte are competitive with other reverse climate destinations in winter for Europeans because of their proximity, compared to the Caribbean, Southern Africa, Indian Ocean and South Pacific. For French-speaking tourists Senegal is the nearest warm, francophone resort destination in winter (though not in summer when Morocco and Tunisia are in operation), just as The Gambia is for English-speaking tourists. Senegal can, therefore, exploit assets that tourists associate with Africa, such as wildlife, even if the variety, habitat and facilities are not as good as elsewhere on the continent, because for many tourists this will be their first visit to or only destination ever visited in sub-Saharan Africa.

Currently, resort/beach and business travel are the two main segments of demand. Senegal has not yet achieved the diversification of its tourism product of which it is capable, which would in turn lead to diversification of its markets. Not even its resort assets are fully exploited. As a comparison, Mauritius has 322.5 km of coast, 8,800 hotel rooms and receives 650,000 tourists, attracted exclusively to the island's resort assets, who have an average length of stay of about 10 days. Senegal has 700 km of coast, 9,835 hotel rooms and receives 390,000 tourists annually, with an average length of stay of 5 days in its resort areas. Mauritius has been an established, nearly year-round, luxury tourism destination for over ten years, but Senegal's resort assets appeal to a middle-income market and, mainly, in Europe's winter.

Business travel may be commercial, or related to the several international, regional and bilateral organizations established in the country, as well as related to conferences and incentive travel. To maintain and increase such travel, Senegal must have good international and regional air access, must provide hotels with good conference facilities and must remain competitive in price and quality with competing destinations.

Senegal's rich variety of non-resort assets provides the potential for diversification of the tourism product that could expand its appeal to a variety of supplier markets and income levels within them. The tourism product is relatively well differentiated by type of activity and by region, which permits Senegal to target distinctive markets for different regions. Perhaps more importantly, some of Senegal's non-resort assets are world-class, as is signalled by their designations.

Non-resort assets appeal to narrower segments of tourist demand than resort assets used exclusively for beach tourism. Although demand is much less in volume than for beach tourism, most of these niche markets have high rates of growth of demand and many aficionados are professional people with above average incomes⁵. Niche market attractions can also be combined selectively with beach tourism to make the resort package more interesting. They can also be packaged in a variety of combinations to suit the taste of tourists not at all interested in sun, sea and sand. Senegal's principal niche markets, some of which are based on marine assets, are: *fishing* (all along the coast, including Casamance, and Siné Saloum) and *diving* in some of these areas; *birdwatching* (Djoudj, Siné Saloum, Tambacounda and Casamance); *ecotourism*, in the sense of distinctive natural assets for viewing and photography, and others that entail *adventure tourism*, i.e., vigorous *trekking, climbing and boating* (Siné Saloum, Casamance, Tambacounda); and *hunting* (Tambacounda, principally). Senegal's *built and living cultural assets* and *handicrafts* enrich the tourism product and constitute another niche market.

In comparative international terms, Senegal has excellent natural assets, distributed around the country, which have considerable potential for tourism beyond the current size of the sector. However, Senegal's mix of assets, some of which have scarcity value for only part of the year, requires sophisticated management and marketing to maximize their economic value while ensuring their sustainability.

DEMAND FOR TOURISM TO SENEGAL

Quality of Data. Quantitative data for tourism are notoriously weak, despite the best efforts of the World Tourism Organisation (WTO)⁶, which is the UN agency officially designated to collect and publish arrivals and expenditure data by country and region annually. Sources for *arrivals* data are the immigration forms that visitors complete and hand over at entry points. Because these are often unsuitable for tourism purposes, some countries, among them Senegal, draw their statistical information mainly from hotel returns prepared for the Ministry of Tourism for the purpose of reporting taxes on bednights. In Senegal, such returns are received from 80 hotels, which cover more than 80% of total hotel capacity and are estimated to accommodate all foreign tourists. The hotel returns distinguish between foreign visitors (non-residents) and Senegalese and foreign residents, but do not distinguish between tourists and business travelers. Because business travelers are foreign, spend foreign exchange, use facilities in Dakar that are also used by tourists, and because Dakar has positioned itself as a conference center, business travelers are included in the tourism analysis in this report.

In 1999, the Ministry reported that visitor *arrivals* to the country from immigration data totaled 501,695, of which 420,022 stayed at hotels and 81,673 stayed elsewhere. The latter category could be visiting friends and relatives or could be staying in non-registered accommodation, or could be returning residents. This *arrivals* estimate is significantly higher than the Ministry's 1999 estimate of 369,116 non-residents staying in hotels obtained from hotel returns. There is no official explanation for this discrepancy and no basis on which to make a judgment without considerable further investigation. As discussed below, the discrepancy may indicate under-reporting by hotels to avoid paying bednight taxes, or, may indicate that the notoriously weak arrivals data everywhere are equally flawed in Senegal.

⁵ A summary analysis of the demographic characteristics of birders in the USA and the UK is included as Annex 2.

⁶ Throughout this report the acronym WTO refers to the World Tourism Organisation and not the World Trade Organization.

Supporting that hypothesis, the Ministry of Tourism reported that *arrivals* data for the year 2000 could not be used and the statistics from hotel returns would be used exclusively for that year.

An advantage of using hotel returns is that much better information is available about the distribution of tourists throughout the country, the category of hotels used, the tourists' average length of stay, occupancy rates and seasonality. The disadvantage is that hotels have an incentive to under-report the number of tourist arrivals and their bednights⁷ when the report is used for calculation of taxes; smaller hotels also have a small multi-functional staff that has difficulty incorporating reporting requirements into a busy schedule. At the same time, the reports to the Ministry are done by the larger hotels that are also using these reports for accounting purposes and management information systems, which suggests that significant under-reporting is probably not likely for the majority of hotel rooms surveyed. The official statistics are used for analysis in this report in the absence of other data. As noted later in this report, the Ministry of Tourism is currently receiving external assistance to improve segments of its data collection systems.

Size and Growth of the Sector and Market Share

Table 1 in the Statistical Annex shows the evolution of the tourism sector in Senegal from 1972 to 2000. In the past fifteen years the progression in numbers of arrivals, bednights and construction of hotels has been interrupted periodically by events beyond the control of the tourism sector. Recently, the sector was affected by unfounded concerns about reactions to the last Presidential election. While data for 2001 are not yet available, it is known that the events of September 11, combined with other exogenous factors such as the closure of Air Afrique, Swissair and Sabena, caused serious disruption of the tourism sector. The increase in VAT in late September 2001 is alleged to have had an impact on profitability of tourism enterprises because managers were unable to pass on the increase for already-booked groups. At issue is whether it will have a negative impact on demand and on the international competitiveness of the sector going forward if it is transferred to tourists.

Senegal's stable political and civic situation has been marred only by the localized unrest in Casamance. Though, whenever violence in Casamance has involved tourists, this has inevitably had a spillover effect on tourism to Senegal as a whole. Nevertheless, given turmoil elsewhere in Africa, Senegal's tourism sector might have expected to benefit significantly from its overall political stability. Yet, in the past 15 years, i.e., 1985 to 2000, arrivals of tourists grew from just under 241,500 to nearly 390,000, an increase of only 61%, and an annual average growth rate of 3.25%. In the past ten years, the average annual growth rate increased to 4.7%, and in the past five years the annual average growth rate accelerated to 6.7%.

During the past fifteen years, however, the numbers of international tourists worldwide more than doubled to 698 million and tourists visiting Africa increased by 177% from 9.7 million to 26.9 million, or at an average annual growth rate of 7%. Analysis of WTO data done for the "Tourism in Africa" study⁸, and based on arrivals statistics for 1985, 1990 and 1997, show that Senegal's ranking among the top twenty destinations in Africa (including countries north of the Sahara), dropped from 7th to 16th in the twelve-year period. Nevertheless, Senegal is still among the top three tourist destinations in West Africa, substantially below Nigeria and just under Ghana, which has moved upwards in rank from 19th in 1985 to 14th in 1997. These comparative data indicate that Senegal has lagged behind some other African countries in the growth rate of tourist arrivals and has lost market share.

⁷ Bednights = number of tourists x length of stay.

⁸ Iain T. Christie and D.E. Crompton (Feb. 2001). The sources used in this report are listed in Annex 7.

Countries of Origin of Tourists

Nearly 75% of tourists to Senegal are from Europe and 50% of all tourists, i.e., over 193,000, come from France (Table 2, statistical annex). Africa supplies most of the remaining 25%, with the US and Canada accounting for 3%. In addition to a shared language, the French also share a relatively recent, common history and still maintain close relations with Senegal, which makes the country “familiar”, and, therefore, a preferred destination. The impact of French tourists is even more dramatic when bednights are considered—the French accounted for 60.6% of all annual bednights in 2000, indicating the high dependency of Senegal on a single market for its tourism (Table 3, statistical annex).

Given its diverse assets and proximity, Senegal should appeal to a wider range of supplier markets in Europe. German tourists declined by half from 1999 to 2000 to just over 8,000 and Germany is the main tourist supplier market in the world. The UK, which is the third largest source market in the world, provides less than 1% of Senegal’s tourists in an average year. Normally birding in Senegal should attract the UK’s active birding community that is used to traveling abroad, but many of the birds that can be seen in Senegal are also more easily viewed in The Gambia’s smaller territory, which also happens to be English-speaking. Nevertheless, if Senegal is to expand its tourism sector, it will have to draw tourists from other countries in Europe and also explore other markets outside Europe, while at the same time marketing itself more broadly in the French market.

African visitors to Senegal account for nearly 25% of all visitors, but only 15% of bednights, indicating that they have short stays. Some 96% of African visitors spend their time in Dakar, with a small number (1677 people) visiting St. Louis and only a slightly higher amount distributed around Senegal’s other tourism regions. This suggests that many of the African visitors are in Dakar on business, but also that this demand could increase as regional treaty arrangements draw neighbors closer together. Dakar provides access to the Ile de Gorée, which is of interest to African visitors, though statistics are not available to demonstrate the numbers who visit the island or whether Gorée is a primary motivation for travel to Dakar. Conferences and conventions provide opportunities to display other tourist attractions in Senegal and could lead to the return, with their family, of foreign delegates. Senegal could also explore offering incentives, e.g., reduced prices for regional visitors, at hotels and other accommodation during the low and shoulder seasons.

Residents. The issue of resident and non-resident visitors in Senegal is important. Many residents while not strictly tourists may behave like tourists. For example over 105,500 hotel bednights, or some 7.5% of total bednights, were attributed to residents in 2000 (Table 1, statistical annex). It would be helpful for planning purposes to understand this segment better. Like regional tourism, foreign residents and nationals can help raise occupancy rates and also, with appropriate incentives, help to reduce seasonality, which is discussed below.

Distribution of Tourists throughout Senegal

An analysis of the distribution of tourists, and more particularly tourist bednights, throughout Senegal reveals national patterns (Table 3, statistical annex). Over 99% of visitors to Thiès (the Petite Côte) are Europeans and 77% of these are French. The French share in bednights dominates most of the other tourist destinations, ranging from 69% in Ziguinchor and Fatick to 79% in Tambacounda, which is both a nature viewing and hunting destination. The most internationally diverse destinations are Dakar, where the French share of bednights is only 40%, with all Europeans accounting for 57%, and Saint Louis, where only 60% of bednights are French. Some 83% of US bednights are spent in Dakar, but the number of US visitors is only 12,017. Black US citizens spend time in Dakar in order to visit Ile de Gorée, generally as part of a longer journey to visit the homelands and slave routes of their ancestors, but these numbers are still small. As already noted, some 96% of African visitors spend their time in Dakar.

Senegal is, therefore, a holiday destination for the French and a small number of other Europeans and is a business destination for most other visitors.

Average Length of Visitor Stay and Repeat Tourism

In 2000, the Ministry of Tourism estimated the average length of visitor stay from all markets, in all regions and for all purposes of travel at 3.4 days—a decline from 3.7 in 1999 and 3.9 in 1998 (Table 4). The decline in overall length of stay is caused by the weight of Dakar in the average, where the stay declined from 2.9 in 1998 to 2.8 in 1999 and 2.4 days in 2000, though why this decline occurred is not clear. The longest lengths of stay were recorded, as expected, in Thiès (5.6 days) and Ziguinchor (5.2 days), the two principal resort destinations, which both indicated a slight rise in length of stay in the past two years. The average length of stay in Fatick was recorded as 2.7 days and in Saint Louis as 2.0 days in 2000. Everywhere else the average hovered around 1.5 to 1.7 days in 2000. There is some indication that the length of stay is longer in the high than in the low season.

Analysis of the length of stay by nationality indicates that Germany (9.0 days), Switzerland (6.9 days), Benelux (5.5 days) and France (4.4 days) had the longest lengths of stay and, with the exception of France, the length is on the rise. The reasons for decline in the length of stay of French tourists from 4.7 days in 1998 and 1999 to 4.4 in 2000 should be better understood and monitored, because of the size of the French market. Other tourist supplier markets with between three and four days' stay are: Portugal, the Middle East, Italy, Sweden and Canada, but their market share is tiny.

By comparative standards, this average length of stay is short for a resort destination, though normal for business travel. Mauritius, which Senegal often considers a model in tourism and which has been most successful in attracting and maintaining luxury tourism, has an average length of stay of just over 10 days, as do resort destinations in the Caribbean that are more dependent on European than North American visitors.

The decline in the average length of stay from an already low level reported by the Ministry of Tourism is a worrying sign and requires analysis. With greater diversification of the product so that tourists have more to see and do, and with improved quality of hotels and services, Senegal should be able to extend the length of stay of its visitors. Given the costs of inducing tourists to travel to a destination and the international competition for tourists, an increase in the length of stay as well as repeat tourism are the two most cost-effective ways of increasing bednights. Currently, only 5% of visitors are (tentatively) estimated to return to Senegal. This relatively low level of repeat tourism is, on the one hand, normal for a meetings/ conventions destination because rotation of conferences is habitual, but for a resort destination could suggest that the tourism product does not match visitor expectations. Repeat tourism is likely to be high where the tourist's specialized interests and the quality of the hotel experience meet expectations. Nevertheless, if access to the country is difficult and/or not competitive, that constraint can dwarf the tourists' *in situ* satisfactions. Visitor surveys are essential to determine the tourists' reactions to their Senegal experience.

Seasonality

Temperatures in Dakar and southern Senegal range from average daytime maximums of 24 degrees C (75.2 F) from January to March and between 25 degrees C (77 F) and 27 degrees C (80.6 F) in April, May and December. From June to October they rise to around 30 degrees C (86 F). Temperatures in coastal areas tend to be lower and those in the interior tend to be higher. The most humid times are just before the rainy season begins in June. The rainy season is nominally from June to October and the dry season from November to May, but the rainy season is actually shorter in the north and the interior and longer in the south, and is observed to be starting later and ending earlier, with lower total rainfall.

Senegal is not subject to hurricanes, which can have a negative impact on a resort destination's image for several years after the physical damage has been erased. The only "climatic extreme" that affects Senegal is "The Harmattan". This dry wind blows from the north usually from December to February and the sky is made gray with dust from the Sahara desert. The effects of the sand grains and dust are felt more in the interior than on the coast. Extreme climatic conditions are not, therefore, a factor in seasonality.

The tourist season in Senegal is divided into a high season from November to April, a shoulder season in August and October, and a low season from May to July and, especially, September. Seasonality is determined mainly by exogenous events: the high season by reverse climate to Europe's winter, and the shoulder season by school holidays and the traditional August holiday month in France. Senegal receives 22% of its tourists in January and February, and 58.5% in the entire six months of the high season (Table 5, statistical annex). In terms of bednights, 23.4% are sold in January and February and 61.5% in the entire high season.

An analysis of the seasonal patterns of tourism demand by Senegalese tourists and non-Senegalese residents indicates some lack of correlation with the seasonality patterns of foreign visitors to Senegal, and, even, with each other. Some 33% of domestic tourism is concentrated in tourist accommodation in the months of July, August and September, with an even distribution throughout the rest of the year, except for lows in February and March (Table 6, statistical annex). The peak months for non-Senegalese residents are (in descending order):

- April (presumably when Easter falls in that month);
- August and December; and
- June, July and November.

Low months are from January to March and in September. Although the numbers of bednights of Senegalese (5%) and non-Senegalese residents (2.25%) are significantly lower than those of non-residents, there appears to be some leeway for a program that would provide incentives for these residents to use tourist accommodation during less than peak seasons and so top up occupancy rates.

Senegal may wish to follow the example of other reverse season resort destinations that have targeted higher-income tourists during the peak season and adapted the facilities on offer for sale at lower prices to lower income tourists during the off-season. The Caribbean, in particular, has achieved this by sophisticated marketing that has targeted different markets for the two seasons. The islands have also developed new non-seasonal attractions in an attempt to increase tourism in the off-season and also to compete more effectively for international tourists, e.g., festivals, golf courses and sporting events. In an attempt to lengthen stay, provide attractions other than resort, and take tourists into areas that have not previously benefited from tourism, the islands have developed nature and cultural tourism products and events. They have also targeted the convention and incentives markets, which are non-seasonal.

Income Levels, Motivations and Reactions of Tourists

Because Visitor Surveys are only now being undertaken in Senegal with assistance from UNDP, little is known about the income levels, professions, size of tourist group, proportion of tourists arriving through tour operators, frequency of travel internationally, motivation for travel, cities of origin within their country of origin, and reaction of tourists to the visit to Senegal. These are all vital data that investors must have to design appropriate accommodation and facilities for tourists. Furthermore, a promotion campaign cannot be designed effectively without them. The surveys need to be conducted

regularly and continuously during the high and low seasons and should be designed to target tourists in different regions, categories of hotels, pursuing different interests and from different source markets.

SUPPLY OF TOURIST ACCOMMODATION

The tourism product comprises Senegal's natural resources, climate, culture and cultural assets, and its built accommodation and range of tourist services. To the tourist, these, together with the quality, ease of access, frequency and price of transport to, from and within the country, the efficiency and courtesy of customs and immigration, the quality of contact with local populations and local officials, health services and banking, credit card and foreign exchange facilities, safety and security, all determine whether the tourist will value the visit and, most importantly, return and/or recommend the destination to family and friends. The quality of the hotel, or its value for price paid, is one of the determining factors in the tourist's appreciation of his or her visit.

Distribution of Hotels throughout Senegal and their Occupancy Rates

Senegal had a total of 9,763 rooms and 18,340 beds in tourist accommodation in 2000, compared with 6,063 rooms and 12,230 beds in 1990 (Table 1, statistical annex). In the past decade, tourist arrivals increased at an average annual growth rate of 4.4%, while the number of hotel rooms increased at a slightly higher rate of 4.9% per annum. The number of hotels has grown from 142 in 1990 to 263 in 2000. The average size of a hotel declined from 42.7 rooms in 1990 to 37.1 in 2000. The distribution of hotel beds throughout Senegal in 1999 is shown in Map I. The distribution of hotels, rooms and beds in 1999 and 2000 in the principal destinations is shown on Table 7, statistical annex.

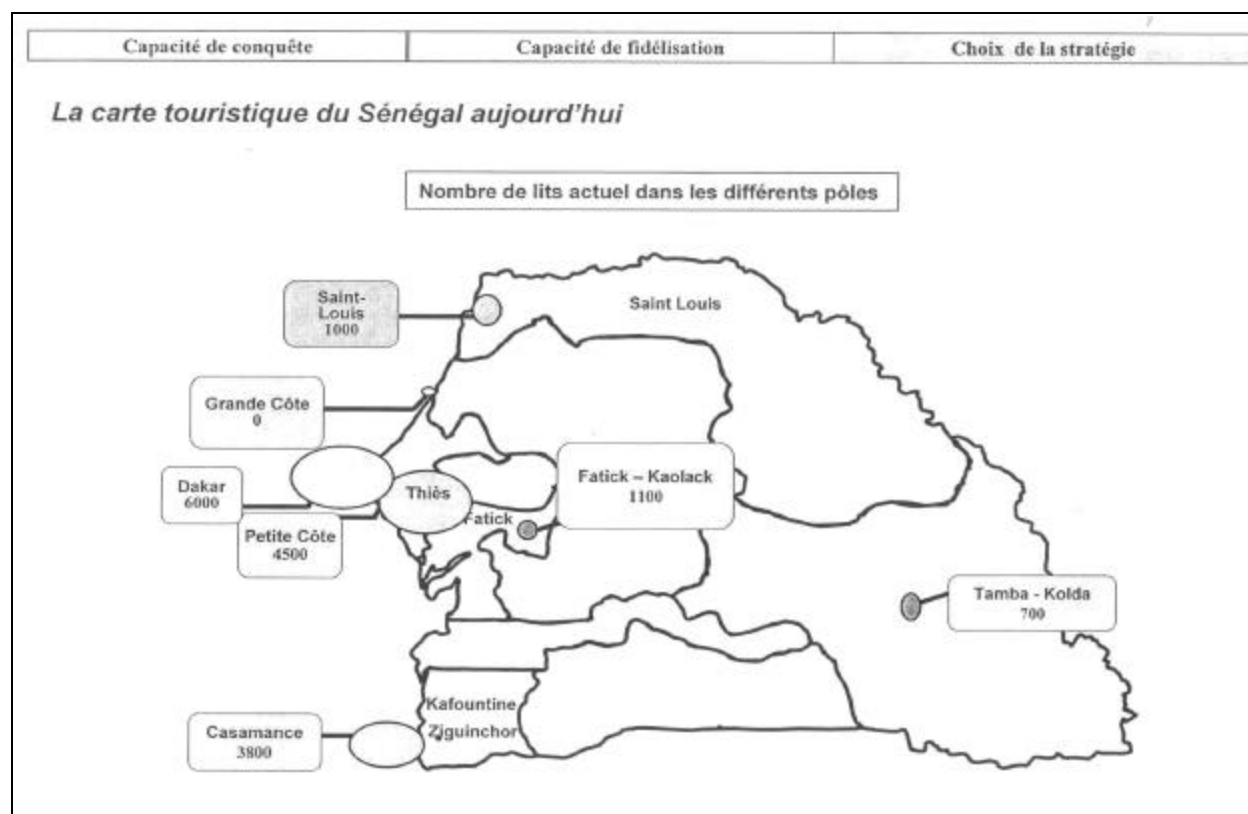
In 2000, the distribution of beds and tourist bednights, in percent, the average length of stay, as well as published occupancy rates by region are summarized below:

Table 1: Distribution of Beds, Average Length of Stay, Tourist Bednights and Occupancy Rates by Region Year 2000

Region	Beds %	Av. Length of Stay Days	Tourist Bednights %	Occupancy Rates %
• Dakar:	34.9	2.4	38.4	31.6
• Thiès	25.7	5.6	45.7	48.1
• Ziguinchor:	21.0	5.2	7.6	36.2
• Saint Louis	6.4	2.0	4.4	20.0
• Fatick	6.4	2.7	2.8	19.6
• Tambacounda	3.0	1.6	0.6	9.4
• Kolda	1.3	1.5	0.2	6.9
• Kaolack	0.9	1.7	0.4	19.0
• Louga (Grand Côte)& Diourbel	0.4	---	0.0	---
	100.0	3.4	100.0	35.4

Source: Calculated from Ministry of Tourism data.

Map 1: Touristic Map of Senegal as of Today



Occupancy rates are highest in Thiès and Ziguinchor, where the average length of stay is longest. Unless there is a constant flow of visitors, such as at a busy airport hotel or a business hotel in a much-frequented city, it is extremely difficult to get adequate occupancy rates with lengths of stay of two days or so. Exacerbating the difficulties for resort hotels of achieving a viable occupancy rate is the relatively short tourist season.

The distribution of beds by category is shown below:

Table 2: Distribution of Beds in Hotels by Category in 2000

	Business Hotels % of Beds	Resort Hotels and Vacation Villages % of Beds
Category		
4-star luxury	45.4	12.5
4-star	17.4	32.1
3-star	13.9	15.9
2-star & other	23.4	39.5

Source: Calculated from Ministry of Tourism data.

According to the Ministry of Tourism (Table 8, statistical annex), there was a 4.4% increase in the number of beds in *business hotels* between 1999 and 2000, with a 26% increase in beds in 4-star hotels, 2.6% in 2-star and other, and none in 4-star luxury or 3-star. In *resort hotels*, there was a 4.2% increase in beds, distributed as follows: 10.7% in 3-star hotels and 6.8 % in 2-star and other. Nearly 63% of business hotels, mainly in Dakar, cater to a clientele that demands 4 star and above accommodation, while in the resort hotels only 45% of clients require 4 star and above, while 16 % require 3-star and nearly 40% opt for 2 star and even lower categories.

In 1997, the last year for which data were available, the chain hotels received just over 38% of tourist arrivals. There were nine chain hotels with a total of 4,196 beds or nearly 25% of total beds in Senegal. The so-called THR study, undertaken for the Ministry of Tourism and the Delegation of the European Union in 1999⁹, audited 227 “independent” establishments with a minimum of 5 rooms in Dakar, Thiès, Fatick, Saint Louis, Tambacounda and Ziguinchor. “Independent” is defined as: not a chain hotel owned or managed by a tour operator. Of the 227 independent establishments that were audited, 122 were categorized as eligible for marketing internationally, which represented 44 % of total bed capacity. Therefore, on the assumption that the 25% of beds in chain hotels are all eligible for international marketing, at least 30% of Senegal’s bed capacity was not suitable for international tourism in 1998, when the study was done.

In addition to hotel capacity, Senegal has 20 *auberges* with 458 beds and 39 *campements* with 1,149 beds, distributed as follows:

Table 3: Auberges and Campements

Region	Auberges		Campements	
	Number	Beds	Number	Beds
Thiès	6	210	7	166
Dakar	2	na	1	54
Fatick	2	22	12	297
St. Louis	9	198	3	67
Tambacounda	0	0	9	329
Ziguinchor	1	28	7	236
Total	20	458	39	1149

The *Auberges* are small gites or inns run by individuals and they vary widely in services provided and in quality. The *Campements*, cater to lower-income tourists and/or those wishing to have a more rugged tourism experience and also vary widely in services provided and quality.

Although only half the “independent” establishments audited in the above-referenced study were hotels, 80% of the bed capacity that the consultants concluded could be marketed internationally was in these hotels, i.e., only 20% of the marketable capacity was in *auberges* and *campements*. The consultants found that the most marketable hotels contained between 25-100 beds, which facilitated their sale to groups of at least 10 to 20 tourists. A high, though un-quantified, proportion of tourists visiting Senegal

⁹ *Projet de commercialisation des hébergements touristiques indépendants du Sénégal*. Résultats des audits et proposition d’un système intégral de commercialisation. 12 avril 1999. THR. Consultants Internationaux en Tourisme, Hôtellerie et Loisirs-Espagne, avec la collaboration du Cabinet Conseil Osein Consult International. Ministère du Tourisme et des Transports Aériens du Sénégal; Délégation de l’Union Européenne au Sénégal.

arrive in groups formed by international tour operators. In 1998, when the study was done, some 30% of accommodation units had less than 25 beds, which made them ineligible for tour operators and forced them into direct marketing, which most were ill equipped to do.

This audit study is useful and can be updated relatively easily to monitor changes in the tourism product since it was concluded. The lessons learned from the study have implications for government policies regarding:

- The types of hotels that should benefit from incentives and their location;
- Promotion and marketing strategies, particularly for the smaller hotels for which a joint marketing program could be undertaken; and
- Revising the categories assigned to existing hotels and setting quality standards for tourist accommodation and, even, eventually, for tourism services.

Hotel Categories

The current system of hotel categories was established some twenty years ago and is operated by the Ministry of Tourism. It is based on quantitative measures but lacks a qualitative assessment of the facilities, which makes it mechanistic. As hoteliers and other tourism professionals in Senegal freely admit, hotel categories are not comparable with international standards and most hotels should be ranked somewhat lower. The EC-financed THR study was intended to evaluate the quality of the existing hotel stock precedent to assisting the hotel sector and the Ministry to introduce a new system of hotel categories, accompanied by a more effective monitoring system to ensure that hotels meet the standards required in each category. If Senegal is to enhance the quality and, therefore, the competitiveness of its accommodation, which could also lead tour operators to value Senegal more highly as a destination, a new system of categorization of tourist accommodation and of quality control through monitoring of the accommodation is urgently required.

Occupancy Rates and Profitability

Linear conclusions about hotel profitability cannot be drawn from average occupancy rates. Average occupancy rates mask differences in the implications for different categories of hotels and hotels in different regions, as well as, among other distinctions, between new and fully amortized hotels. Even in a situation of overall low occupancy rates, individual hotels with efficient management, high quality in their particular price range and established marketing systems can raise occupancy rates to profitable levels. For example, the ten major hotels in the Saly region, each with from 60 to over 290 rooms, are estimated to have room occupancy rates that average over 65% and are assumed to be profitable. As a broad generalization, in a standard competitive situation and depending on a number of caveats, particularly capital structure, a positive return on investment is expected once occupancy rates reach 55-60%.

Evidence of the profitability of these Saly hotels, containing nearly 20% of all hotel rooms, in a situation where national average occupancy rates hover around 35%, suggests that a situation of non- or little profitability exists for large segments of the rest of the hotel sector. Ministry of Tourism data confirm this assumption, indicating that bed occupancy rates in business hotels were at about 30% in 1999 and 2000, with marginally higher rates in 4 star hotels than in 4 star luxury or 3 and 2 star hotels. Resort hotels had average occupancy rates of 54% in 1999 and 40% in 2000. The decline in occupancy rates in resort hotels in 2000 is attributable to a 250-bed increase in capacity in 3- and 2-star hotels and an overall decline in bednights by tourists of nearly 5%, caused by a slight decline in the average length of

stay despite a small increase in tourist arrivals in that year. In 2000, the different categories showed the same general trends in average occupancy rates as for 1999:

- 70% in 4-star luxury
- 41% in 4-star
- 38% in 3-star
- 18% in 2-star.

Small, family-owned hotels may be less critically affected financially by low occupancy rates than commercial hotels. Many *auberge*-type hotels do not apply standard accounting practices to the use of their own labor and use part of the hotel as their own home. Nonetheless, lack of profitability causes less money to be spent on maintenance and refurbishing and, often, a reduction in the number and quality of services offered. This then leads to lack of competitiveness with other destinations and can eventually cause the destination to be downgraded for use by lower-income tourists. The apparent evidence of lack of profitability in substantial sections of the hotel sector in Senegal is based on published data only and requires further analysis before operational conclusions can be drawn and certainly prior to any expansion of the hotel sector, as discussed below.

International tour operators play a role in the profitability or otherwise of the tourism sector through the number of tourists they can mobilize for a particular destination and by the price they pay for their block bookings. When a hotel is dependent on block bookings, has a relatively short season and there is excess capacity in the sector, international tour operators can, within reason, dictate the price they are willing to pay to send large groups to that hotel. Although the international resort market is highly competitive in all its categories, more destinations compete worldwide at the lower price end and in summer. In winter Senegal is a premium destination because of the proximity of its warm climate and resort destinations. But, in summer, when tour operators mobilize the European mass market, resort destinations around the Mediterranean and Adriatic are more accessible than Senegal, and the weight of the airfare in the total package makes the country less competitive. To compensate the air costs in the package, tour operators will put a downward pressure on hotel prices when they make block bookings. While this is likely to happen year-round, tour operators are able to charge more for the total package in winter than they can in summer, from which the hotel also benefits. In a situation of low occupancies, hotel managers and owners will accept low prices if these cover fixed costs. Senegal is particularly vulnerable to high airfares and low hotel prices because of its dependence on one supplier market, France, and on one airline, Air France.

Expansion of Tourist Accommodation

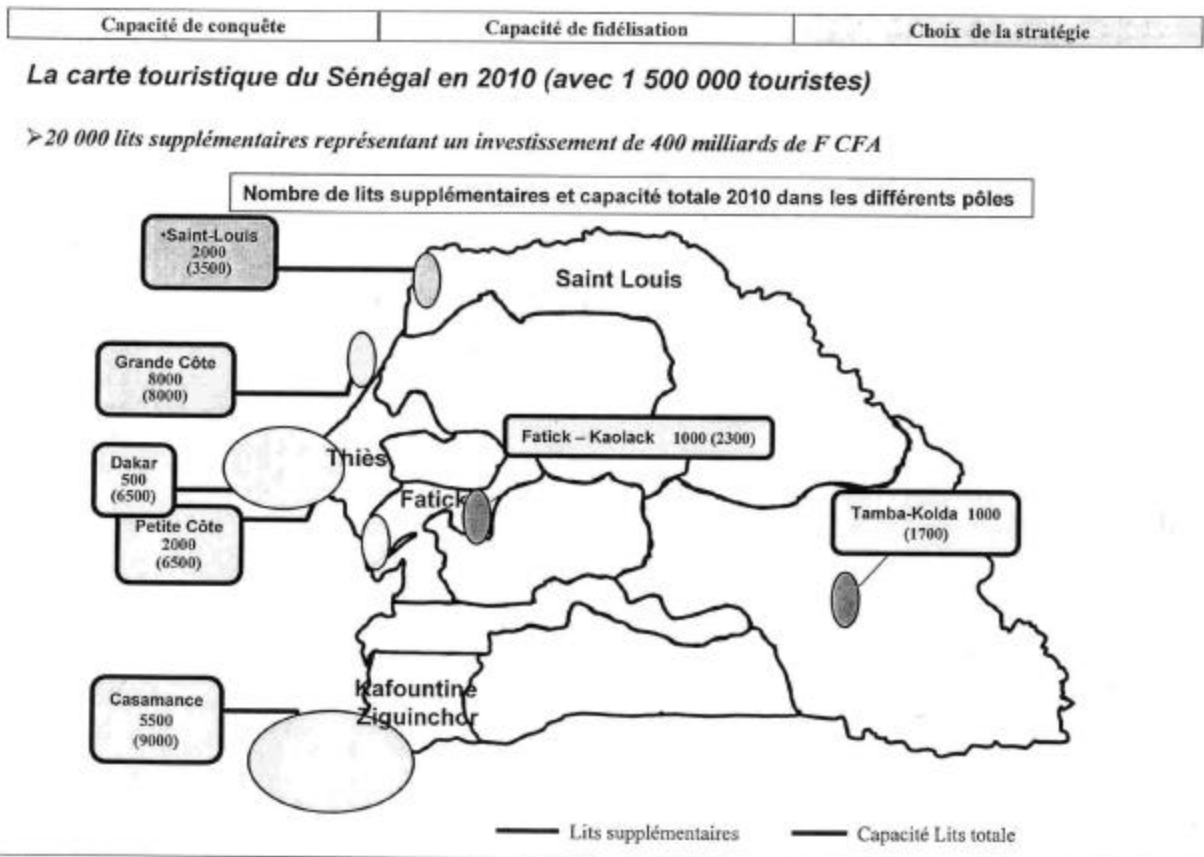
Participants at the recent *Journées nationales de concertation*, confirmed decisions made during public-private consultations in 2000 that the target for Senegalese tourism should be 1.5 million visitors by the year 2010 and to achieve that target an estimated 20,000 more beds would have to be added, calculated to cost CFA 400 billion. The targets require a more than doubling in hotel beds in the ten-year period from 2000 to 2010. The last doubling in bed capacity took 16 years to achieve between 1984 and 2000 and that did not entail a concerted policy to raise the standards of accommodation.

Currently, Senegal seems to be increasing capacity in 4-star hotels for its business visitors in Dakar (a 26% increase in 2000 over 1999), but, as shown in Table 8 (statistical annex), expanding only 3- and 2-star capacity in resort hotels, by 10.7% and 6.8% respectively in 2000 over 1999. On the assumption that the investment responds to current demand, Senegal appears to be viewed as a resort destination more suitable for middle-income tourists, which is the exact opposite of Senegal's current expectations. This market image has an impact on the price at which Senegal can sell its resort

accommodation and on the type of tourists that it can attract. To achieve its targets of larger numbers of higher-income tourists, Senegal will need to improve its image in the international market through an intensive promotion campaign, but will also have to concentrate its new investment in higher categories of hotels.

The proposed distribution of the 20,000 beds required to meet the target of 1.5 million visitors in 2010 is shown on Map 2, below.

Map 2: Touristic Map of Senegal by 2010



The proposed additions and total number of beds in each region by 2010 would be as follows:

Table 4: Planned Additions of Beds by Region to 2010

Destination	Number of Beds to be Added	Total Beds with Additions in 2010
Casamance	5500	9000
Grand Côte	8000	8000
Dakar	500	6500
Petite Côte (Thiès)	2000	6500
Saint Louis	2000	3500
Fatick	1000	2300
Tamba-Kolda	1000	1700
Total	20,000	37,500

The most ambitious proposal is to make the *Grand Côte* into a major new resort destination. The Grande Côte refers to the entire coastline of Senegal north of Dakar and the Cap Vert peninsula. From its starting point at Kayar to the mouth of the River Senegal near St. Louis the coast is one long uninterrupted beach. The Grand Côte area is much less developed than the Petite Côte because of high winds, rough seas and a more fragile coastal area that includes the Niayes, a series of small depressions located among the coastal sand dunes north of Dakar, which contain high plant biodiversity. The Cooperation Française is currently assisting the Government to preserve and enhance the *Saint Louis* area. The *Fatick* area contains an International Biosphere Reserve and the entire Sine Saloum Delta is environmentally fragile. The *Tamba-Kolda* area contains Senegal's largest park, the Parc National de Niokolo-Koba, which is designated as a World Heritage site and as an International Biosphere Reserve. *Casamance* currently suffers from civil unrest, which has disrupted tourism except in isolated areas. Additions to capacity in most of these regions will require careful identification of prime sites for tourism development and an equally careful attention to the sustainability of the natural and cultural assets in the region. The support and inclusion of local people also needs to be assured. These issues are best covered under the aegis of a Master Plan.

If Senegal is to expand its bed capacity substantially in order to attract larger numbers of tourists, specific preparation is required:

- Master Plans should be done in the major regions where tourism is expected to expand with the objective of measuring carrying capacity of the sites and ensuring that any expansion is sustainable, while also raising the quality and competitiveness of the tourism product. This should help to refine decisions about the exact distribution of the 20,000 new beds;
- A study of the profitability of hotels by category and by region is needed to determine where market demand is strongest; and
- A marketing analysis of potential demand for tourism to Senegal to determine whether Senegal can appeal to higher-income markets and can diversify into new geographic markets.

The results of these studies should be combined with an analysis of the current terms of lending for hotels, which greatly affects profitability and competitiveness. An analysis is also needed of the appropriateness of current incentives to attract the hotels that respond to current and potential tourism demand. A variety of different incentives can help to shape the future tourism product to meet national

expectations. Among them is the removal of the various constraints discussed in this report and the creation of a sound business climate for investors.

Tourist Services

A full-scale survey of the services offered to tourists in Senegal was not possible in the short time available to do this study. As a general impression, restaurants in the major tourist destinations tend to be very good and competitively priced by international standards. Most tourists do not use internal public transportation because it is not suitable for group travel. The quality of internal travel arrangements provided by individual ground tour operators is generally efficient, but is affected by the state of roads to the major tourist areas and traffic congestion. Air access between the major internal destinations is currently almost non-existent either because of the absence of adequate infrastructure or because most tour operators and travelers prefer the cheaper road travel. Air Senegal flies between Dakar and the more distant Ziguinchor and Cap Skiring. Boat travel along the coast is limited to officially scheduled, large passenger vessels, but tourists do not generally use these. Train travel is available only between Dakar and Bamako, in Mali.

Outside Dakar, credit cards, travelers' checks and foreign currency are not accepted everywhere. Additional problems arise when the telephone line to Paris is not functioning and authorization for the credit card use is automatically denied. The lack of these exchange facilities is a function of the dominance of tour operator travel in which most of the services provided by the hotel and ground tour operators are pre-paid abroad.

Medical facilities in Dakar are considered to be very good. The larger Petite Côte tourist accommodations provide access to emergency medical services.

Tourists are pursued, sometimes harassed in Dakar and in public places, including beaches, by vendors, who are persistent and cause annoyance to tourists. Security in most areas of Senegal is typical of most parts of the world—tourists should be sensible about where and when they move around a city or the country as a whole. The only area with serious security issues is Casamance.

CRUISE TRAFFIC

Dakar is on the circuit of a few cruise lines. According to the C.S. P. D., cruise ship passengers amounted to 10,992 in 2000, with 2,751 arriving in the first three months and 8,241 in the last three months (Table 9, statistical annex). This represented a 24% increase over 1999 but a decline of nearly 2000 passengers compared to 1998. Changes in the frequency of visits and in size of ship used are common in the cruise industry. Dakar might have potential for development as a more important cruise ship destination because of its proximity to Europe. The African continent and its surrounding islands are still somewhat underdeveloped as a cruise market, except for South Africa. According to the trade, in the worldwide high season from December to March, African destinations compete against better-known destinations in the northern and southern hemispheres, e.g., the Caribbean, South Pacific, Mediterranean and Adriatic. A major constraint is the lack of availability of destinations within Africa that have the required port and reception infrastructure for cruise ships, as well as, because of the short stays in each port, easily accessible outstanding tourist assets. A peaceful and safe environment for cruise passengers, as well as freedom from extreme weather conditions, are much valued by cruise lines. Dakar fulfills some of these requirements.

The extent to which Senegal should pursue cruise tourism, however, needs further analysis. As noted in another context¹⁰, the Caribbean, a major cruise destination, has maintained an ambivalent attitude to cruise tourism. Port infrastructure is expensive and the financial and economic benefits from cruise income are a matter of debate. When a cruise ship disembarks its passengers in a local port the social costs of traffic congestion can be high. Nevertheless, most Caribbean islands have set out to attract such visitors and a large service industry depends on them for part of its income. Should Senegal decide to try to attract more cruise ships, it will need to weigh the infrastructure costs of expanding port and access facilities against the port charges and taxes to be derived from this traffic and the ensuing tourist expenditures. The mitigation and prevention measures of any social costs that it might generate, such as, traffic congestion, would also need to be factored into Senegal's charges to cruise lines.

MARKET ANALYSIS OF SENEGAL AS A TOURIST DESTINATION

During the course of the previously referenced THR study undertaken for the Ministry of Tourism and the Delegation of the European Union and issued in 1999¹¹, the Consultants undertook a survey of thirty tour operators. Of these, 50% operated in Senegal and the other half operated in other parts of Africa but not in Senegal. The majority of tour operators were located in France and Belgium and the others in the Netherlands, Italy and the UK. The tour operators were required to comment on three aspects of Senegal's tourism: as a resort destination, on its non-chain hotels, and on its promotion and marketing. The results are shown below.

Senegal as a Resort Destination

Selling Points	Weaknesses
Proximity to Europe	Equipment and infrastructure
Sun in winter	Health conditions (preventive vaccinations required)
Fauna, flora, scenery	Ground transportation
Ecotourism	Lack of security (Casamance)
A welcoming population	Poverty of the local population
Few complaints by tourists	Scarcity and expense of air transport to Senegal

Non-Chain Accommodation in Senegal

Strengths	Weaknesses
The overall quality of hotels, notably those that are incorporated	Independent hotels are an unknown factor, except for those that are incorporated
A quality physical setting	The quality categorization system is not trustworthy
	Absence of a price policy

Promotion

- No promotion material;
- No information service available in major source markets;
- Too few familiarization visits offered to tour operators and travel agents;

¹⁰ Crompton, D. E. 1999. See Annex 1. List of Sources.

¹¹ The work was actually done in 1998.

- Too little communication, e.g., press communiqués and conferences, and promotion with the trade and the public; and
- But, websites are greatly used.

Even though this market survey was undertaken in 1998, the results are still valuable, because as yet no major reforms have been undertaken in the tourism sector to address these issues. The exception is the creation of the “*Association pour la promotion de l’industrie du tourisme au Sénégal*” (APITS), with assistance from the EU, which has brought together representatives from the private sector and created a tourism website that has recently become operational¹². The other exception is the holding of the *Journées nationales de concertation*, organized by the Ministry of Tourism in March 2002, for tourism stakeholders in the public and private sectors with the objective of reaching agreement on a strategy for the sector.

ECONOMIC IMPACT OF THE TOURISM SECTOR AND ONGOING RELATED STUDIES

Tourism activity generates substantial economic activity through personal spending in and outside the tourist accommodation. Tourism also generates employment and business activities through backward and forward linkages with construction, agriculture and fishing, manufacturing, transport, banking, insurance, telecommunications, medical, security and retail services and handicrafts.

The main source of information on the economic impact of tourism on the rest of the economy to date is derived from an input/output study done in Senegal in 1996¹³. According to that study, “Hotels, Bars, Restaurants”, which is the definition of “tourism”, consumed more local inputs than any other sector and was the first consumer of transport services and, above all, of air transport services. The definition of “tourism” that is used excludes other components of tourism, such as travel agencies and ground tour operators among services, and ignores use by the local population of hotels, bars and restaurants. Nevertheless, because it is the only study available, the consumption of local inputs by the sector, as defined, are shown below:

- 35% -- agricultural and food products;
- 16% -- support to firms (services aux entreprises);
- 13% -- energy;
- 7% -- petroleum products;
- 7% -- financial services;
- 4% -- telecommunications; and
- 17% -- others.

A study of the “leakage” factor in tourism in Senegal was done in the late 1970s¹⁴. Leakage may be defined as that part of tourist expenditures that leaves the destination country to pay for imports of goods and services consumed by the tourism sector. The extent of the leakage of foreign exchange is directly related to a country’s level of economic development, its economic diversification and the openness of its trade arrangements. For comparative purposes, leakage should be calculated for the main economic sectors in the same country. The 1970s study, which was done before the opening of Saly, the

¹² www.senegal-tourisme.com

¹³ Direction de la Prévision et de la Statistique. Tableau Entrée-Sortie. 1996.

¹⁴ Philip English. Ph.D. thesis. 1979

main tourist region, suggested that leakage of foreign exchange was about 35% of tourist expenditures and was typical of the modern sector in Senegal at the time.

Given the current and potential importance of tourism in generating foreign exchange, employment and taxes and as a regional development tool, more current work is required on the linkages between tourism and other production and service sectors; on the import content of hotel construction, hotel operations, tourist service operations and goods purchased outside the hotel by tourists; and on the supply chains that bring local products to hotels and for purchase by tourists outside hotels. This assumes that a study of the import content could lead to identification of opportunities for substitution of local products for some imported goods and assumes that the tourism sector has the potential to increase its purchases of intermediate and final goods that are produced or could be produced in Senegal. It also assumes that a study of existing supply chains will reveal the intermediate and final beneficiaries in the process and could lead to proposals for greater efficiency in production and delivery systems throughout the chain. Finally, it assumes that the analysis will indicate opportunities for SMEs to supply the tourism sector.

A thorough analysis of the economic impact of tourism on the Senegalese economy and its backward and forward linkages is necessary on three counts to:

- Establish the linkages of tourism to other production and service sectors so as to identify investment, production and marketing opportunities for goods and services that are inputs in the tourism product, with a particular emphasis on opportunities for SMEs;
- Improve the quality of the inputs and, therefore, the competitiveness of the tourism product; and
- Generate an understanding within Government about the economic impact of the tourism sector and to assist the Government to undertake a holistic review of its policies towards the sector to improve the business and investment climate for tourism.

In 1993, the United Nations called on all countries to develop a National Satellite Account for Travel and Tourism (TSA) to provide a credible measure of its true contribution to the national economy. A satellite account measures the size of economic activities that are not included in their own right in national accounts. The objective is to inform the policy decisions of governments and the investment decisions of private industry. Canada, France and South Africa, among a number of developed and developing countries, have begun to work on introducing TSAs. The results generally show that the percentage contribution of tourism to GDP and to export revenues is considerably higher under TSA than in conventional calculations that use only estimated direct tourist expenditures. While a calculation of the true contribution of tourism to GDP would help to improve understanding of the sector's impacts and linkages, data are not currently available to calculate a TSA and need to be generated. Appropriate indicators need to be defined, systems to collect and collate data have to be established, and user-friendly methods of publication and data storage have to be devised. The data must be retained in databases accessible to both the public and private sectors.

Currently, the Ministry of Tourism is being assisted with some of these needs by external agencies, as discussed below. Until the results of this ongoing work are available it is not possible to assess the Government's needs, if any, for additional assistance in data collection, collation and interpretation. Furthermore, only when that ongoing work is completed will it be possible to decide whether systems are in place for Senegal to undertake the considerable work required to create a satellite account for the travel and tourism sector.

Currently, two studies are being undertaken that could either reduce the need for new studies or circumscribe those that still need to be done. A joint effort by the Government, UNDP and WTO was begun in August 2001 to assess the impact of tourism on the Senegalese economy. The study was to develop recommendations to:

- Optimize the positive impacts of the sector on the national economy;
- Limit and prevent perverse social and environmental effects of tourism; and
- Strengthen the inclusion of Senegalese in the sector.

The team of consultants was due to present six studies that assess the quality of information available in each case and make recommendations about: tourism activities, visitor surveys, marketing, socio-cultural aspects of tourism, environmental issues, and the financial and economic impacts of tourism. The individual studies were due in January 2002 and the summary report in March 2002. These studies have not yet been received by IDA despite reiterated and recent requests and, therefore, could not be used as inputs for this sector study.

The *Fonds français d'aide et de coopération* is undertaking a Master Plan for Saint Louis and its surrounding area, as well as an evaluation of the capacity of the Ministry of Tourism to manage the Plan. This will entail an assessment of related functions of the Ministry, including collection and analysis of statistical data, as well as a marketing and promotion plan for the region. This study, which is being done for a total cost of French Francs 10 million, was due in 2002.

In the sections that follow, the data that are used in official publications and that are derived from ad hoc studies, now several years old, are used. Once the above two studies are available, some of the tools to improve the quality of the data that follows should be in place.

Tourism Expenditures

Estimates of total tourist expenditures are notoriously difficult to calculate accurately, principally because direct expenditures of tourists outside their hotel can be substantial and difficult to capture. Expenditure data in Senegal are derived from a visitor survey undertaken in 1995/1996, which established that the average daily expenditure of a visitor was CFAF 69,044 (about \$100). No distinction is made between tourists and business travelers and no adjustment has been made over time for inflation or exchange rate changes. Total expenditures are obtained by multiplying that per capita expenditure by the number of bednights in hotels. This total is then used to calculate tourism's contribution to GDP and its share of total exports and of taxes. The distribution of expenditures is obtained by applying the percentages established in the 1995/1996 survey, e.g., 70.8% is spent in the hotel, 12.1% on souvenirs and 5.5% on food and drink outside the hotel.

Because many tourists visiting Senegal have already pre-paid much of their expenditures through a "package" payment for air travel and hotel, often with full payment for meals, transfers and other services included, they may be unaware of the exact amount of their in-country expenditures, except for personal expenditures. Furthermore, where there is vertical integration between a tour operator, the airline and/or the hotel, it is particularly difficult to calculate how much is actually transferred to Senegal. Nevertheless, a visitor survey can lead to a reasonable approximation of the truth about tourist expenditures. These are relied on in many countries, though local statisticians may have to make heroic assumptions about what proportion of the tourist package is spent on goods and services in the destination.

There are no foolproof alternative methods to measure tourist expenditures. Tourists pay part of their expenses in their home country, part in the hotel itself and another amount outside the hotel. They may arrive with their national currency or may already have bought some Senegalese currency and may also bring with them travelers checks and credit cards. They may exchange these at a bank, at their hotel, or in any of the places they visit to eat, shop, be entertained or be transported. There is no single channel for tourist expenditures through which they can be counted and no documentation, as there is with merchandise exports, by which their total expenditures can be traced.

If visitor surveys are used to calculate expenditures, they should be updated regularly. Any change in the mix of accommodation categories, in regions visited, in the availability of tourist attractions, and in souvenirs offered will cause some change in the level and distribution of tourist expenditures. Senegal is using a visitor survey that is now some six years old, therefore, the total of individual expenditures and the distribution of that amount between categories is likely to be outdated.

Using the above parameters, gross tourist expenditures were officially estimated at CFAF 96.8 billion (US\$129 million) in 2000 or about 14% of export revenues. These estimates ranked tourism second after fishing and well before groundnuts and phosphates in foreign exchange earnings. Despite the fact that Senegal has 63% of beds in its business hotels in 4-star and 4-star luxury categories but only 45% of its resort hotel beds in those categories, and, despite the fact that 52% of arrivals stayed in business hotels, nearly 63% of tourist expenditures was generated by resort hotels. This is due to the longer length of stay of resort tourists (5.6 days) compared with business travelers (2.4 days). The estimates reveal nothing about changes in tourism preferences since 1995/96 because of the method used to calculate the expenditures—a major gap in the state of knowledge about tourists.

Because tourism expenditures are the main measure of tourism's contribution to the economy, new visitor surveys are urgently required. At the moment, the Government, with assistance from UNDP and the WTO, is doing new visitor surveys in the low and high seasons. If they should lead to new calculations of tourists' daily expenditures—preferably by hotel category and region, which could also lead to separate estimates for business hotels, they should be used to calculate total tourist expenditures in future.

Contribution of Tourism to GDP

Using the official calculation of expenditures, tourism, i.e., hotels, bars and restaurants, is estimated to have contributed 2.5% of GDP in 2000. The contribution of tourism to GDP will vary according to country circumstances, including dependence on imports, but the level for Senegal seems low. The experience of the Dominican Republic provides an interesting case study. Before using the WTO methodology and creating a satellite account for tourism, the Dominican Republic, as does Senegal, only measured hotel and restaurant revenues as tourism earnings, which amounted to about 4% of GDP. With assistance from WTO and UNDP, the Dominican Republic undertook an experimental TSA in 1993, which was updated in 1998. The data for 1996, on which the 1998 accounts were based, indicate that tourism expenditures amounted to 20.5% of GDP. The Dominican Republic receives about six times the volume of tourists that Senegal receives annually, so the above analogy is not intended to indicate a likely ratio for Senegal.

Employment

Estimates of employment created by tourism are:

- 12,000 jobs created directly in hotels; and
- An additional 18,000 jobs created indirectly.

With a hotel stock of 9,763 rooms, the Ministry is using a ratio of 1.2 employees per room to estimate those employed in the hotel sector. Even given the distribution of 63% of rooms in business hotels and the rest in resort accommodation, which tends to employ more staff per room than business hotels, as well as seasonality, which normally causes hotels to reduce staff in the off-season, this estimate seems conservative. Over 60% of bednights are spent in hotels outside Dakar and, generally, a norm of some two employees per resort hotel room is used in developing countries.

The above estimate of direct employment in tourism, excludes those employed in tourist services, such as travel agencies, ground transportation, airports, restaurants, water and beach sports, bars and discos, shops, the entertainment industry, handicrafts, and in maintaining cultural, natural and wildlife assets, etc. Obviously, many of these activities cater to the resident population as well as foreign tourists, so the employment cannot be attributed one hundred percent to tourism. But, with some 400,000 tourists, the number directly employed in hotels and ancillary tourist activities should be higher than 12,000.

The calculation of direct to indirect employment in Senegal is based on a ratio of 1:1.5, i.e., 12,000 employed directly causes an additional 18,000 people to be employed outside the tourism sector as a direct result of the demand for goods and services generated by tourism. The level of this indirect employment depends on the strength of the linkages between tourism and other production and service sectors such as: transport, agriculture, fishing, food processing, boat building, construction, furniture, pottery and china making, manufacturing, financial and telecommunication services, etc. Tourism also creates opportunities for small and medium scale enterprises and a variety of other employment opportunities. Given the assumption that direct employment is too low and, as noted above, that tourism has strong linkages to other production and service sectors, the estimate of 18,000 in indirect employment from tourism would seem to be too low also.

As noted in “Tourism in Africa”, an often-neglected facet of employment in the sector is that tourism creates “good jobs”. Physical working conditions are healthier, pleasanter and safer than in several aspects of agriculture, fishing, logging, mining and, often, manufacturing, among other sectors of economic activity. But, also, hotels and tourist services create jobs such as waiters, maintenance engineers, and drivers, which are relatively well paid, particularly when supplemented by tips. In Senegal, the 30,000 jobs estimated to be created through tourism annually amount to some 14% of the total salaried jobs in the entire country.

Taxes and Incentives

Taxes on tourist bednights are estimated to contribute some 5% of total tax revenues. VAT is taxed on accommodation used by tourists. The tax was raised in September 2001 to 18%. The hotel industry has protested the increase, which was introduced because of harmonization of taxes in the *Union Economique et Monétaire Ouest Africaine*¹⁵ (UEMOA). There are three principal reasons for the concern:

1. In response to decreased demand for tourism worldwide after Sept. 11, many competitor destinations reduced taxes on the hotel sector and increased promotion funds for tourism to help bail out a sector suddenly negatively affected by exogenous factors. By contrast, Senegal raised the VAT on 24 September 2001;
2. The VAT increase was imposed after hotels had accepted bookings from tour operators and individuals for the 2002 season, and, therefore, could not be passed on to tourists. Contracts with tour operators last from seven months to one year and cannot be changed during their term. The

¹⁵ The English name for UEMOA is West African Economic and Monetary Union.

industry says that the tax raises its future prices to uncompetitive levels and will have to be partly absorbed rather than passed on; and

3. Industry also claims that its already meager profitability has been substantially reduced by the VAT and that many tourism-related businesses will have to close. Private sector representatives claim that they have absorbed higher wage costs, as well as increased prices of food and transport, during the last few years because they have been unable to increase their hotel prices significantly in an attempt to remain competitive with other destinations. They also claim that it is impossible to recuperate VAT on food products (where prices have also increased), as the Hotel Incentives program allows.

The Government claims that because the tax is a regional rather a national tax it cannot be changed unilaterally. The private sector claims that Senegal is the only country in the region with a significant tourism sector and that the Senegalese Government should have protected tourism from the increase, as other countries protected other sectors of importance to them.

The private sector claims that they are excluded from benefits, such as reduced electricity rates, which are granted to “industries”. These rates in many West African countries are possibly among the highest in the world. The hotel and restaurant sector, therefore, claims that their international competitiveness is also affected by the high cost of electricity and they should receive the same exemptions as “industry”.

Tourism benefits from the National Investment Code (Law No. 87-25 of 18 August 1987). Included in the list of eligible projects is: tourism and related activities. The duration of the benefits vary from five to twelve years, according to the region in which the investment is made. The longest terms are given to investments in some of the main tourism regions: the region of Thiès (7 years), the regions of Fatick and St. Louis (12 years). The actual incentives also vary according to the region. Among the incentives are:

- Exemption from import duties and taxes on equipment and materials not produced nor manufactured in the country;
- Exemption from value added tax invoiced by local suppliers on goods, services, and works required for the execution of the approved program; and
- Employment incentives for hiring Senegalese.

Firms are also exempt from registration and stamp duties; capitation tax; and taxation on licenses “for those systems having priority”. Here it is difficult to say if tourism is included or not because it depends on the size of the enterprise and other factors.

Though incentives are an important and controversial element of investment policies for tourism, there is no readily available recent compendium of such programs, even where these are used extensively such as in the Caribbean. In that region, they can be specific to tourism or part of the country’s wider investment incentives, as they are in Senegal. In the tourism sector, they are generally offered to investors in hotels and consist of tax and duty-free import concessions for the construction of hotels and of tax holidays for fixed periods during their operation. Some governments, including St. Lucia, have considered extending such incentives to a wide range of businesses and services in the ancillary tourism sector, including restaurants, taxis, and transport for nature tourism and marine projects.

Most governments believe that they cannot attract tourism investment without such incentives and most investors say that a hotel’s profitability depends on the incentives. A study by Arthur Andersen:

“A Five-Year Strategic Plan for St. Lucia”, done some five years ago, analyzed the several incentives provided by Caribbean governments for hotel investments. On the subject of tax holidays, the authors state: “Common throughout the Caribbean, exemption of profits from corporate income taxes for a specified period (typically 10-15 years), is not a particularly effective incentive both because virtually every other competitive destination offers it and because hotels generally earn little or no profits during the first 3-5 years of operations. On the other hand, denying tax holidays would tend to put a destination at a competitive disadvantage.the impact of these types of incentives on government revenues tends to be relatively minor.”

As noted in the “Tourism in Africa” paper: “Potential revenues from tourism can be reduced by the tax incentives offered by many governments to prospective investors. The ubiquitous tax incentives persist because each government believes that investors will turn to rival destinations if they do not match incentive packages offered elsewhere. The World Bank Group instead argues that the best incentive for tourism (or any other) investors is an appropriate policy, legislative and regulatory framework, together with good physical planning and performing infrastructure, and a healthy and crime-free environment.”

The complexity of the topic is beyond the limited scope of this sector study but an assessment of the appropriateness of the current incentive program for hotel investments in Senegal is needed. If incentives are to be offered, they should induce investments in the specific type and category of hotel, as well as location, that will maximize economic benefits to Senegal. Careful consideration should also be given to the type of incentives that should be provided to induce local people, with smaller amounts of capital, to enter the tourism sector and to ensure that their investments are viable either in the international, regional or domestic markets. Senegal would benefit from a cost-benefit study of the incentives it offers hotel investors and an assessment of their appropriateness in attracting the type of investments in the regions that Senegal has declared as priority regions.

Regional Development

No specific studies have been done on the impact of tourism on individual regions in Senegal. Nevertheless, tourism has provided the economic base for the development of the Petite Côte and has the potential to be the development catalyst in other regions with tourist assets. A question that needs to be asked in this context is—if not tourism, what? Coastal regions have in the past depended for employment generation and incomes on fishing, but, with declining catches in near shore areas, fishing is increasingly becoming more industrialized and coastal villages are seeing a decline in fishing income. Given the small number of salaried jobs in Senegal, the production and service jobs that tourism can create could improve the economic base of regions with tourist assets. It is essential, therefore, that the study of linkages and supply chain analysis discussed above be undertaken and its lessons applied in order to extract the maximum benefits possible from tourism in each region.

“Regional development” is also used in the sense of creating opportunities for several countries within a region to market and promote themselves jointly, perhaps even requiring only one visa per tourist for visits to all the countries. In this system, the region pools its assets to create circuits that together are more marketable than the assets of any one national destination. The potential for regional development has not been explored in this context because of the sector report’s limited mandate and not because the idea lacks interest. Given the current absence of a regional airline, however, plus the need to improve tourism product standards in Senegal and most probably in other countries too, and the absence of marketing and promotion by these governments, regional tourism should remain on the agenda but should be taken up only after each of the countries has undertaken the types of improvements to its tourism sector that are suggested for Senegal in this report.

TOURISM AND POVERTY

The PRSP (December 2001) refers to tourism under tertiary activities and notes the considerable contribution of commerce, tourism and telecommunications to GDP. The PRSP states that the objective is to preserve and increase the potential of tourism through the strengthening of assets, the inclusion of local people in management of the sector and the attraction of 500,000 tourists annually for the next five years. (The target established by the *Journées de concertation* in March 2002 is to reach a level of 1.5 million tourists in 2010). The principal axes for the plan entail: putting in place a tourist code, preparation of new sites, expansion and diversification of source markets, principally through promotion of luxury tourism and charters. This strategy will be accompanied by promotion of and support for community-based tourism and skills that are tourism-related.

The PRSP states that the Government will:

- Develop policies to prepare feasibility studies for the tourist sites and their access routes;
- Encourage private sector investment in these sites through supporting measures of financing, tax incentives, land facilitation, etc.;
- Initiate an air transport policy to help the tourism sector (Open Skies);
- Aggressively promote the destination in the principal tourism supply markets; and
- Contend firmly with security issues faced by tourists and guarantee a healthier and more secure environment for tourists.

The proposed promotion of tourism within the same cluster as culture, art and handicrafts will be part of a long-term strategy to generate employment, promote regional development and land management, stimulate economic growth and increase local value added. The Government notes that the lack of recognition and a legal framework for culture-related occupations leaves them marginalized and part of the informalsector. Significant segments of the population, particularly youth, that adhere to these cultural activities find themselves without a fixed income and without access to welfare assistance. Their jobs are not included in those classified as requiring support and promotion. The Government has stated that it will put in place a legal and fiscal framework and will define professional statutes for these entrepreneurs, actors and cultural specialists.

Capturing benefits from tourism for local communities, other than through employment in hotels and related services, tends to be most successful if there are targeted interventions. Senegal has some experience with community-based tourism. In the past, the Government of Senegal encouraged a system of village camping grounds, the *Campements Ruraux Intégrés* (CRIs), which were built by villagers with government loans and run as cooperatives, with the profits reinvested in schools, maternity clinics and health centers. Most camping grounds were built in local style, using local materials, i.e., mud bricks with a smooth mud layer over the top, with lighting generally by oil lamps. Most *campements* have showers and toilets with running water. The *campements* were mainly but not exclusively centered in Casamance. The first opened in 1973 at Enampor. An estimated 20,000 tourists used the *campements* annually in their heyday. Currently, as listed in the section on Supply of Tourist Accommodation (above), there are 39 active *campements* with 1149 beds distributed throughout Senegal. Private entrepreneurs have also invested in *campements*, though for their own profit rather than the village.

The Government will need to evaluate the CRI experience in each of the regions where these are established to decide whether they should be expanded, selectively preserved and improved, or whether another type of community-based tourism would be more appropriate to today's targets for the tourism

sector. Expansion of the *campements*, which are mainly used by lower-income tourists, has to be balanced against the Government's proclaimed interest in attracting higher-income tourists.

There would appear to be possibilities for incorporating fishing villages into the Senegalese tourism product as places to visit to experience the local living culture and built assets, to shop for handicrafts, to eat or to stay overnight. Other types of villages could also be suitable for incorporation in the tourism product. "Incorporation" could only take place with the full knowledge and consent of the local people involved, accompanied by targeted measures to ensure that they benefit from the incorporation. Such arrangements would be most successful if they were part of a nearby hotel's itinerary for its guests, requiring that the local hotel sector be incorporated into the planning for such projects. The supply chain analysis discussed above should reveal opportunities for creation of SMEs at the village level that could supply local hotels and tourism related services; such opportunities are likely to require technical and financial assistance, probably best delivered by NGOs. Annex 3, Pro-Poor Tourism, contains examples of different types of community-based tourism in different parts of the world, some of which may be replicable in Senegal.

A thorough analysis of the potential for mitigating poverty through tourism in Senegal is required and this is best undertaken in specific locations within a tourism region. Best practices can then be developed once a set of case studies is available. The Master Plans for the main tourist areas proposed earlier would be an appropriate vehicle for analysis of and design of projects for tourism and poverty in specific regions.

TOURISM EXTERNALITIES

Tourism can be a potent development tool and in Senegal, where rural poverty is widespread and where the poor put stress on the natural resource base, tourism is capable of generating positive externalities. First, because the assets extend throughout the country, tourism can create pockets of economic growth in regions that have no alternative sources of income and employment. Second, tourism, properly managed, can help to preserve the environment, whether for ecotourism or for resort-based tourism. Unfortunately, tourism can also have negative social externalities such as prostitution and drugs. These issues are discussed below.

Tourism and the Environment

Tourism, carefully managed, can become a tool for environmental protection and for financing conservation. To achieve which, regulations need to be established for any construction in sensitive ecological areas, such as the coastal zone, but also for all the other areas of major tourist potential that have natural resources as their prime attraction. Incentives also need to be created for local people to protect the local habitat, the animals in the national parks, and/or the cultural assets in their communities. Under the best incentive schemes, local communities derive concrete financial benefits from assets that are visited by tourists, so that protection of these assets is perceived to be in the community's interest.

The Environment Code was updated and reissued in 2001. Environmental impact assessments (EIAs) now have to be presented for every investment. Although, Senegal defines the coastal zone (100 meters inland from the high water mark) and restricts construction in that area, it does not yet have an Integrated Coastal Zone Management plan. Some 60% of Senegalese live on or near the coast. It is also the area where the two major economic sectors, i.e., fishing and tourism, are located and it contains some of the most valuable ecological sites in the country. Accommodation constructions on the coast should be subject to setback regulations that also take into account sea level rise. Densities should be strictly controlled through physical planning and zoning regulations, as well as, where feasible, site-specific

carrying capacity measures for beaches. Codes of conduct should be adopted by the diving sector for reef protection and there should be penalties for their non-observance. A management plan for the coast is urgently needed. In its absence, Master Plans for the major tourist areas on the coast and for other ecologically sensitive areas are essential if the use of these natural resources for tourism is to be sustainable.

The Government has created a chain of national parks to preserve sensitive ecological sites and biodiversity. The parks cover a considerable area of the country and have the potential for greater significance in the tourism product, particularly as the ecology of many of the parks is diverse and they differ radically one from another. The six principal national parks, with their main ecological characteristics, are:

- Niokolo-Koba, near Tambacounda in south-eastern Senegal, the country's largest park, with a wide range of habitat and large numbers of birds and mammals;
- *Basse Casamance*, forest, woodland and mangrove;
- *Siné Saloum*, coastal lagoons, mangroves, sandy islands, dry woodland;
- *Iles de la Madeleine*, a group of small islands near Dakar;
- Djoudj, the world's third most important bird park; and
- *Langue de Barbarie*, the area between the river and the ocean in Saint Louis.

Several other areas contain protected nature reserves, including:

- Ferlo wildlife reserve in north-central Senegal;
- *Réserve de Bandia*, a private wildlife reserve on the way to the Petite Côte; and
- Samba Dia, a Biosphere reserve in the north of the *Siné Saloum* Delta.

The state of these parks and reserves is not well known and clearly their maintenance is a heavy charge on government funds. A study to assess the state of each of the major parks and reserves and their sources of funding, actual and potential, is required.

Government planning for the coastal zone and sensitive ecological areas should ensure that the economic rents from tourism development and from natural resource use benefit local and state coffers rather than the developer or the individual consumer. (Scarce public assets, such as beachfront land, tend to generate above normal rates of return when developed.) The Government should ensure that returns are sufficient for environmental monitoring of the asset and for the upkeep of any infrastructure or other related public sector investments that help to preserve the natural resource base. A summary note on this subject is attached as Annex 4.

“Willingness to pay” studies indicate that tourists can be tapped to support environmental or cultural protection either through entrance fees, departure or other taxes, and voluntary contributions. The incidence of fees on prepaid tour operator packages will generally be slight, so they can be added to costs without any adverse impact on demand. Tourists always require assurances that their contribution will be earmarked for the specific use for which it was given rather than becoming a part of general budgetary revenues. Most tourists will also willingly support local communities with which they come in contact.

To enhance the country's image, as well as help preserve the natural resource base, the larger accommodation units and, particularly, those in sensitive ecological areas should begin to aim for hotel accreditation that signifies that the unit is operating under sound environmental management systems.

(Annex 5 contains a note on the process for adopting environmental management systems in tourist accommodation.) Hotels currently seek international accreditation, either from the non-profit International Standards Organisation (ISO), which grants the coveted 14,001 status, or from Green Globe, which was launched by the World Travel and Tourism Council (WTTC) and has now become independent. Some regions of the world are preparing their own accreditation system. The main condition for an acceptable accreditation system is that it be seen to be independent and objective.

“Green” accommodation conserves water and energy, disposes of all wastes without polluting and sets up recycling and utility monitoring programs, among other operating principles. After an initial capital investment that is generally recouped within the first year, hotels have recorded considerable savings in both energy and water consumption and through recycling programs. As a result of an accreditation program supported by USAID in Jamaica, hotels are reported to have improved profitability, enhanced guest relations, built bridges to local communities and helped to preserve the island’s beauty. There has also been a significant positive externality through improved health and sanitation practices in employees’ homes and in their communities, which has been attained mainly by employees taking home the lessons learned on the job, but also by outreach programs from hotel management to local communities.

A major reason for seeking environmental credentials for tourist accommodation and services is that many lodges and hotels worldwide are already doing so. Senegal, currently, does not have any accredited “green” tourist accommodation at all. “Green” tour operators in developed countries increasingly only establish business relationships with hotel and lodge managers that have adopted “green” practices—as is demanded by an increasing number of tourists, particularly European. Some of these “green” tour operators include the largest companies, such as TUI (Germany) and British Airways Holidays. A major benefit from accreditation is that a large number of awards or “ecolabels” are now offered for good environmental management of hotels and other accommodation. Those awards receive wide publicity and become an effective marketing tool for the accommodation, and, in the process, for the country.

Senegal needs external assistance with the environmental management of its natural resources used for tourism. The entire accommodation and services sector also needs to address the issue of its role in creating an image of environmental responsibility, which is increasingly important to European tourists as well as others.

Negative Social Externalities

The negative social aspects of tourism can include an increase in prostitution—at its worst of child prostitution—and of drug trafficking. There are two ways of containing these negative externalities. The first is that the legal authorities in Senegal have to wage a vigorous campaign against them, using every medium of communication, and must enforce laws. Under recent international agreements, child prostitution offenders can be prosecuted to the full extent of the law in the country where the offence occurs but also in their home country once they leave the tourism destination.

The second means of containing these activities is through educating local people and tourists and establishing codes of conduct for tourists. Tour operators have begun to instruct their tourists in the WTO code of ethics that was recently approved by member parties. Specifically tourists must also be advised of the social, cultural and religious mores of the largely Muslim country they are visiting. This can become the responsibility of tour operators and hotel managers, though they will need to be provided with appropriate materials for distribution to clients.

The World Bank is proposing to undertake a study of the negative social externalities from tourism in Senegal. Such externalities can encompass not just prostitution but also alienation, the breakdown of traditional social structures, and the abandonment of cultural traditions. These negative social externalities can arise from almost any type of economic development, not just tourism. Furthermore, prostitution in a poor country is a function of poverty and the absence of alternative sources of employment and income occurs where there are clients who are willing to pay for the services. Such clients may be local or foreign and are generally located in urban as well as tourist areas and around ports and airports, and centers of concentrated economic activity. The study will attempt to identify the issues and the extent to which tourism rather than other types of economic activity could be a significant causal factor.

MANAGEMENT OF THE SECTOR

Whether Senegal becomes a major tourism destination will depend on the quality of sector administration. Tourism is essentially a private sector activity but is highly dependent on public sector support. Tourism cuts across many sectors and there is often little communication between them. Among the ministries with functions and/or activities related to tourism, in addition to the Ministry of Tourism, are: those ministries responsible for finance, land, public works, transport, agriculture, labor, culture, national parks, immigration and customs, and commerce. To be successful, tourism requires coordination and complementarity of actions within Government and between the Government and the private sector, civil society in general and, in particular, with local communities that are specifically impacted by tourism, where NGOs can facilitate the process. Only a continuing dialogue between the public and private sectors can lead to successful tourism management. Despite some progress, that dialogue is not yet in place in Senegal. A strengthening of public and private sector institutions, combined with a strengthening of coordination mechanisms within and among them, should facilitate the process but specific procedures should be put in place as soon as possible to formalize the dialogue, as is suggested below.

The State of Knowledge about and Strategy Formulation for Tourism

Studies have been done over the years about specific aspects of the tourism sector in Senegal. A benchmark study: “Plan stratégique de développement touristique du Sénégal. *Projet 1,3 million de touristes en 2010*” was commissioned by the then *Ministère du Tourisme et des Transports aériens*, (MTTA) done by Geomar International, with financing from the Canadian International Development Agency (CIDA), in 1995. In 2001, with assistance from a local consulting firm, Performance Management Consulting, some financing from IDA, and as part of the activities of the *Groupe de réflexion pour la compétitivité et la croissance* (GRCC), a cross-section of public, private and non-profit representatives reviewed existing material on the sector and held numerous consultations. Their conclusions were formulated into a five volume document: “Strategies and Action Plans for the Cluster of Tourism, Culture, Art and Handicrafts”, which was published in February 2001. More recently, as discussed earlier, at the request of the Government and with assistance from UNDP and the WTO, consultants undertook studies on the economic impact of tourism and its social and environmental effects.

The GRCC places “tourism, culture and leisure” as one of the four pillars of the Senegalese industry in the twenty-first century. By the year 2020, it says Senegal should become “an important cultural and leisure site and a tourism destination of international renown” not just in West Africa, but also in the continent of Africa. The cluster of components of this successful tourism sector will be:

- Resort tourism, with a diversification into beach use and beach sports, sea-related health treatments, golf, cruises, sports fishing;

- Nature tourism with a diversification towards ecotourism, and photo, fishing and hunting safaris;
- Business tourism, including meetings, seminars, congresses, fairs, incentive travel; and
- Cultural tourism, historic and religious sites, and living cultures.

Aware that a strategy for tourism is essential for the implementation of sound policies for the sector, the Ministry of Tourism organized “*Journées nationales de concertation*” beginning on March 5, 2002. Participants were drawn from a cross-section of the tourism sector, including: decision-makers, tour operators, Members of Parliament, researchers and journalists. The output of the consultations will be a “tourism charter”, which will be submitted to an inter-ministerial council for approval. Participants confirmed that Senegal should aim for 1.5 million visitors by the year 2010.

If the Senegalese tourism sector is to evolve sustainably and efficiently, a sector strategy for tourism is essential, but it must be flexible and must be updated regularly to reflect market trends and product expansion and differentiation. An annual strategy discussion among all stakeholders will create a custom of consultation about tourism between the public, private and non-profit sectors. While the strategy may not require significant updating from one year to another, it is important that incipient international trends be identified and appropriate measures taken to shape the design of the tourism product.

Role of the Public Sector

Despite the economic importance and potential of the tourism sector in Senegal, the services that the Ministry used to provide have declined over the past few years and for several months in 2001 the Ministry of Tourism was actually abolished. The private sector petitioned government to reinstate the Ministry citing the economic importance of the sector and its own need for an interlocutor.

Currently, the public sector lacks the capacity to manage this cross-sector activity. This has been recognized by the *Fonds français d'aide et de coopération* which is currently evaluating the capacity of the Ministry to manage the project in St. Louis, which it is helping to finance. Once this study is available, the remaining areas where technical assistance and training for the Ministry is required can be identified.

The target of an increase in tourism to 1.5 million tourists by 2010 represents a significant challenge for Senegal. The public sector as a whole will have to work cooperatively to respond to the needs of the tourism sector. This will require that the Government give voice to and have the resources to respond to the priority needs of the sector. This, in turn, requires a forum for interaction between the public and private sectors, so that the public sector can be regularly informed about the state of the tourism sector and the private sector knows the extent of the support it can expect from Government. One possibility is the creation of a task force with representatives of the relevant Government ministries, the private sector and local communities and stakeholders to guide the implementation of a strategy for the tourism sector.

L'Association pour la promotion de l'industrie du tourisme au Sénégal (APITS) and the Maison/Office du Tourisme

Many countries with a strong tourism sector have created an entity to undertake specific functions that require the expertise and functions of both the public and private sectors. The main objective is to create a:

- Venue for a dialogue and cooperation between the public and private sectors;

- Forum where the National Tourism Strategy will be reviewed and updated annually if required;
- Body that can manage the design and implementation and find funding for a marketing and promotion campaign that reflects the objectives of the National Tourism Strategy;
- Center for information about the tourism sector in Senegal, including the tourism website; and
- Flexible mandate that allows the entity to undertake or manage ad hoc tasks that arise periodically, e.g., providing expert advice to Government and regional bodies, tourism-related research, etc.

A primary function of such bodies is to raise and manage joint Government and private sector financing for a promotion and marketing program for the country as a whole. Currently, Senegal's marketing and promotion campaign consists largely of attendance at selected international tourism fairs by representatives of the Ministry of Tourism, who pay for a booth where members of the private sector can advertise their products. Reportedly, no promotional material for Senegal as a country is available for distribution at the fairs or elsewhere.

L'association pour la promotion de l'industrie du tourisme au Sénégal (APITS) was created on June 9, 1999, at the initiative of the MTTA with support from the European Union. The objective was to bring together independent leaders within the tourism sector to create synergy and cooperation between them and with the public sector. The specific function of APITS was to manage tourism promotion for Senegal both nationally and internationally as a cooperative venture by the public and private sectors. The new body was modeled after successful examples in major international tourism destinations and, particularly, after the "*Maison de France*". A major initial setback for the concept of the equivalent of a "*Maison du Tourisme*" (or "*Office du Tourisme*" as it is called in Senegal) was the decision by the Ministry of Tourism not to associate itself with APITS and the website. There are some indications that the new Ministry may be reconsidering that decision. If so, this would facilitate cooperation and the all-important dialogue between the public and private sectors and help to strengthen promotion of Senegal, the absence of which is a constraint on the growth of the sector.

APITS currently has 62 members from the Senegalese private sector and is managed by a Board consisting of twelve members representing:

- The principal regional tourist poles (Dakar, Thiès, Saloum, Tambacounda, St. Louis, Ziguinchor);
- Large hotels (with a capacity above 500 beds);
- Medium-sized hotels (with between 100 and 499 beds);
- Small hotels (with between 10 and 99 beds);
- Travel agencies for incoming tourists; and
- *Campements* and *auberges*.

One problem is that after the initial financing from the EU for an office, a permanent secretary and the initial planning for the website, APITS has been thrown back on the voluntary contributions of its members, which is limiting its capacity to implement an agenda. Unfortunately, the long-delayed website (www.senegal-tourisme.com) is not yet operational despite optimism that it would be accessible on the Internet in mid-March 2002.

Trade Associations

The *syndicat patronal des industries hôtelières du Sénégal* (SPIHS) operates as a trade association for the hotel industry in Senegal. It has its own office and permanent secretary. The *syndicat des agences de voyages et de tourisme du Sénégal* (SAVT) represents travel agencies and the local representatives of international tour operators in Senegal. Both organizations are active in representing the interests of the tourism sector as whole and participated in the GRCC discussions for the elaboration of a strategy for the tourism, culture and art cluster, and in the recent *Journées de concertation*. Both these organizations should be active partners in the continuing dialogue about tourism organized through the *Maison* or *Office du Tourisme*.

Role of Senegalese in the Tourism Sector and Training

The current President and both Vice-presidents of APITS are Senegalese. Senegalese work in all facets of the hotel and tourism services sector and at all levels. Senegalese are prominent within the chain hotels and in the large independent hotels at all levels, including managerial. At the lower end of the hotel scale and in the *auberges*, many are owned and operated by Senegalese. The expatriate community, many of whom are long-term residents and/or have taken Senegalese nationality, are heavily engaged in the hotel, restaurant and ground tour operator business.

The *Ecole hôtelière* is well regarded but lacks capacity to train at higher levels of management and specialization. This is normal for a hotel school, which often concentrates on training in basic technical skills and for lower-to-middle management skills. All the larger and higher category hotels have their own internal training programs. There is a new initiative to begin to train travel agents, which is a private sector project.

CONSTRAINTS ON THE GROWTH OF THE SECTOR

As is evident from the comparison of the potential of Senegal's assets with its current numbers of tourists and economic benefits, the sector is operating well below its potential. The following sections attempt to identify the main constraints on the growth of the sector.

Lack of Access

A major limitation on the expansion of the tourism sector is the lack of availability of seats on the few airlines that now serve Dakar and the cost of such access. In one fell swoop, three airlines that served Senegal closed in 2001: Air Afrique, Swissair and Sabena. Air Afrique flew daily, Sabena had five flights per week, and Swissair two per week. The only scheduled airline still flying to Senegal from Europe is Air France and it has daily flights. Senegal has been totally dependent on Air France to move its tourists and business travelers, as well as local traffic. In addition to reduced access from Paris, the abrupt reduction of direct access from tourism markets in Belgium and Switzerland had a negative impact on these and other European source markets because all passengers first had to travel to Paris to board a plane to Senegal. In May/June 2002, Senegal again began to be served by a restructured Swissair (Swiss) and by a Belgian airline (SN Brussels Airlines) that emerged from the reorganization of Sabena. Regional connections from other African countries continue to be affected by the shut down of Air Afrique.

A new airline has begun to provide some new services. Air Senegal International was constituted in January 2000 and operated its first flight in February 2001. Capitalization was provided 51% by Royal Air Maroc (RAM) and 49% by the Government of Senegal. *Air Sénégal International* is now planning to

make three weekly flights to Paris with a stopover en route in Rabat. There is also speculation that it will resume the old Air Afrique route of direct flights between Dakar and New York.

Even before the reduction in scheduled air service, Senegal was dependent for its tourism traffic on charters and these filled the gaps during the recent interruption of scheduled services. Some of the chain hotels are associated with international tour operators that run charters. Charter flights have been arranged by FRAM, *Nouvelles Frontières* and Neckerman and these increased their frequency in the 2002 peak winter season. Although the Government of Senegal has expressed support for the use of charters and it is an obvious solution to the current crisis in air access, the consequences of long-term dependence on charters without a sustained flow of scheduled airline traffic needs to be analyzed. Some countries that are trying to promote the image of exclusivity and attract higher-income tourists think charters detract from that image because they are associated principally with the movement of mass tourism at low cost. Islands in the Caribbean limit or ban charters in the peak winter season and Mauritius has refused until now to allow charters at all.

Local tour operators cite the high cost of air travel to and from Senegal as one constraint on the growth of tourism and as having a major incidence on the cost of tourism packages. Senegal needs assistance in examining its options for improved air access if it is to have any hope of attaining the ambitious targets it has set for tourism growth to the year 2010. The issue is not just that of mobilization of tourists to Senegal but also the competitiveness of tourism packages given the current costs of air travel to Senegal. In the recommendations section, a study is proposed to assist the Government to formulate an air policy that will remove this major constraint to the growth of tourism and to its competitiveness.

Marketing and Promotion

In today's highly competitive market every tourism destination competes with all others in the world in its price level. Owners and managers market their individual hotels to potential tourists, but, just as important, countries also promote themselves as a composite destination in the international tourism market to create a distinctive image of the overall attractions and culture that distinguishes the country from all other competing destinations. Such a promotion campaign, which should be permanent, should be preceded by a marketing campaign to identify new source markets. It requires that the public and private sectors agree on a multi-pronged promotion strategy, identify the best commercial talent they can afford to promote the country abroad and finance the implementation of the strategy jointly.

Recognizing the importance of adequate promotion for Senegal as a destination, the Government introduced a tax on bednights as a source of funding for a promotion program. The bednight tax of CFA F 600 is added to the hotel bill and then passed on by the hotels originally to the Treasury and now to a designated commercial bank account, to facilitate timely withdrawals. The proceeds from this tax are designated exclusively for promotion and the management of the funds is the joint responsibility of the Ministry of Tourism and the tourism private sector. The private sector, however, considers that it has not been sufficiently involved in decisions about how the funds should be spent, but instead has been expected to endorse decisions made by the Ministry of Tourism and that most of the funds are used to supplement the Ministry's own budgetary gaps. Part of the problem is the interpretation of the term "promotion", which for the Ministry can mean internal and/or regional promotion by its own staff within Senegal. One of the first tasks of the public and private sectors must be to define the purposes for which the funds from the bednight tax can be used and establish a process and timetable for these annual decisions.

Senegal cannot achieve its targets for the year 2010 unless it undertakes a consistent and sophisticated promotion program in targeted markets. Ideally, APITS needs to be converted to a *Maison* or *Office du Tourisme* that would include representatives from the Government to implement a marketing

and promotion strategy for Senegal. Marketing analyses done in the context of the THR and GRCC/Performance Marketing studies, which were accompanied by proposed promotion strategies, will provide a useful starting point for the strategy. While these studies should assist the parties to make informed decisions, tourism promotion is an expert field and Senegal should turn to commercial companies to undertake the actual marketing and promotion. Arguably, the national promotion campaign should start by selectively promoting assets that are already accessible to tourists and where there is quality accommodation and infrastructure. The next step would be to incorporate the niche markets of birding, fishing, diving, eco- and adventure tourism, and to exploit the tourism potential of Senegal's rich cultural heritage and existing art, music and handicrafts. In addition to expanding tourist numbers, the strategy's related objectives would be to extend the tourist season and the tourists' length of stay, and to ensure a distribution of tourists throughout all Senegal's areas of tourism potential.

The *Office* would also ensure that tourism journalists are invited to Senegal on familiarization trips to write about a variety of topics for a range of thematically and geographically diverse journals, magazines, newspapers and websites, as well as to produce films for TV and documentaries. The *Office* would encourage and assist local authorities to design and make known tourist attractions, such as music festivals, village cultural festivals, art shows, fishing competitions, etc. In addition to maintenance and upgrading of the website as the sector expands, promotion materials would include brochures, maps, posters, etc.

As the quality of Senegal's tourism product improves, the promotion campaign should intensify. Therefore, sources of funding have to be identified for start-up and for the longer term. The activities of the *Office* would be funded by the bednights tax discussed earlier but other sources of financing will also be required once the marketing and promotion campaigns are in the hands of experts. The public and private sectors will be required to contribute and to take over responsibility for the campaign, but initially external assistance will also be necessary, as discussed in the recommendations section of this report.

A corollary objective of the *Office* or *Maison du Tourisme* would be to assume the other functions of similar successful organizations, as was discussed earlier, i.e.,

- Venue for a dialogue and cooperation between the public and private sectors;
- Forum where the National Tourism Strategy will be reviewed and updated annually if required;
- Center for information about the tourism sector in Senegal, including the tourism website; and
- Flexible mandate that allows the entity to undertake or manage ad hoc tasks that arise periodically, e.g., providing expert advice to Government and regional bodies, tourism-related research, etc.

Land Management

Land, as a broad generalization, is owned by the Local Authorities and they decide applications for land use. Land is issued to developers under a long-term lease. As is the case in many—if not most—countries, the coastal zone in Senegal has been subjected to over-building and speculative land holdings and areas of tourism potential have attracted an influx of job and income seekers who have laid claim to land for their personal use. As a result, land for tourism development in high-priority areas is scarce and at a premium, which has become an impediment to investment in tourism, as the case study for the Fatick area illustrates.

The Fatick administrative area covers 7,935 sq. km. or 4.4% of Senegal. Between 1999 and March 2001, the Ministry of Tourism, the Governor of the Fatick Region, Local Authorities and Mayors, and representatives of communities and the private sector, were engaged in designing a regional tourism

management plan for the area. In 1999, the Regional Commission for the Identification and Census of potential tourism sites delivered a report, which was widely debated, on their findings. This was followed by the issuance of Terms of Reference for a Tourism Management Plan for the Fatick Region and preliminary bidding documents. In March 2001, the Governor of Fatick issued a decree creating the Regional Technical Commission for the supervision of the process of tourism management in the region. The Ministry of Tourism in the same month, issued a letter to the Governor, noting the local support for the Plan but also expressing concerns about the “anarchic” occupation of land in the area, which constituted an impediment to investment promotion and the future of tourism. The Minister stated that it was a priority to complete the management plan for Fatick. To facilitate the task, the Minister requested the Governor of the Region to freeze allocations of land and construction permits in the priority sites identified by the Regional Commission. There has been no further action since.

Resolution of the land management issue is essential if Senegal is to realize the potential of its tourism sector. A rationalization of land uses in the coastal zone is urgent because the 700 km of valuable coastline cannot be expanded and this is and will be the main focus of international tourism interest. Nevertheless, the land use issue is no less serious for other non-coastal tourism areas. The remaining areas with tourism potential are all environmentally sensitive and require that the type of development, densities, environmental regulations and the limits to growth be specified prior to any expansion in construction in order to protect the asset base. Because local authorities own land, solutions to the issues about land ownership are most likely to be feasible if they involve the local communities from the outset, so the focus of land management solutions should be at the local or regional rather than national level.

The issue of “ownership” or title for the use of the land is one aspect of land management. The other is the important one of zoning, physical planning and environmental regulation. Master Plans for the principal tourism areas could evaluate the sites and select those best suited for tourism development, those that should be preserved as public areas, for conservation of cultural or natural resources, for major infrastructure projects, and for other types of development, including tourism services and community initiatives. Physical planning and environmental regulations help preserve the natural resource base, restrict development within zoned areas and ensure that construction is aesthetically appropriate. These measures will increase the value of the tourism product and make it more attractive to potential investors. Related objectives are to raise standards of accommodation and services that will attract higher-income tourists and to improve the quality of life of local communities in tourism areas.

Sites that are large enough could be considered for development as Tourism Development Areas, i.e., clusters of hotels and tourist services. The target should be to create a cluster of high quality accommodation and tourist-related services, with supporting infrastructure and appropriate land management regulations that create a major tourist attraction. Surrounding the accommodation, there should be supporting facilities such as restaurants, shopping, entertainment, financial, telecommunications and transport services, as well as access to emergency medical services. The grouping of small accommodation units within a cluster, with supporting services, would make it feasible to attract larger tourist groups to this type of accommodation by distributing them among the facilities. Clusters can be designed for any one or a variety of income levels and size of market. The main condition for success is that the price of the cluster accurately reflect its value, thus improving Senegal’s competitiveness in the international tourism market. A tourist circuit can then be designed around clusters of the same value, creating a series of circuits of excellence at different price levels. A note on the concept of clusters and circuits of excellence is in Annex 6.

Infrastructure

Infrastructure for tourism is needed on two counts. First, basic transport infrastructure has to provide access to and from Senegal and to and from tourist areas. Within the tourist areas, infrastructure

is required to service hotels and tourist services but also to ensure that hotels and tourist services can be operated sustainably, i.e., without negative environmental impacts. Hotels can always substitute their own services for those of the public sector in provision of electricity, water, and disposal or recycling of sewage, water, and all other forms of waste but this can substantially raise their capital and operating costs.

The *Société d'aménagement de la Petite Côte* (SAPCO) was established in the mid-seventies, with assistance from the World Bank, to help attract tourism investments and provide infrastructure for the land to be developed in the Petite Côte. According to the Project Completion Report (PCR), dated February 8, 1991: "The infrastructure at Saly was completed and eight hotels were built, providing about 1762 beds or some 30% below the number originally foreseen. SAPCO was successfully established and its performance was generally satisfactory." Senegal will need to consider whether the SAPCO model should be replicated for other tourist regions. Experience elsewhere suggests that development agencies of this nature tend to be more effective if their mandate is confined to a region rather than expanded to a national context.

In a situation of expanding tourist accommodation, combined with the target of achieving higher standards of accommodation while also remaining competitive internationally, the most cost-effective way of providing infrastructure needs to be analyzed in Senegal's context. The possible sources of funding for tourism infrastructure are the public sector with or without external donor assistance, the private sector, whether directly or through taxes on tourists, or a public-private alliance.

A survey of Senegal's infrastructure requirements for tourism and its funding is beyond the scope of this report. Surveys of each of Senegal's priority tourism regions need to be undertaken, as well as an assessment of infrastructure requirements at the national level that affect access to and services in all the prime tourist regions. The best vehicle for such an assessment would be through regional Master Plans and a crosscutting national survey, which also examines funding possibilities.

Investment in and Financing for Hotels

Substantial new investment will be required for the accommodation sector from here on. As is the case in many countries, local banks for a variety of reasons are reluctant to finance hotels and local investors find available financing too short-term and costly and the eligibility criteria too onerous. As noted by the IFC and quoted in "Tourism in Africa": "A new hotel typically takes about three years to achieve a stable level of revenue. Grace periods are also often eroded by construction and completion delays. Inadequate grace periods contribute to the need for financial restructuring. Longer repayment periods and/or graduated payments should be considered."

Again a worldwide problem is the lack of financing for refurbishing, remodeling and upgrading of standards of hotels, particularly small hotels, which are often mostly locally owned. The same problems apply to tourist-related services. This is of concern in Senegal where the objective is to encourage local ownership of tourism establishments and to upgrade the tourism product in general.

As a follow-up to the Geomar and THR studies, a report was prepared for the Ministry of Tourism in 2000 by the Cabinet Osein Consult International on the identification of financing mechanisms for the tourism sector. This study provides an important starting point for discussions about the financing of tourism, which will be essential to attain the objectives of local inclusion in and improved standards for the tourism sector.

Tourism and related activities are already included in the national mandate of the *Agence nationale chargée de la promotion de l'investissement et des grands travaux* (APIX), which is charged

with investment promotion and acts as a “one-stop investment shop” for investments in Senegal. Given tourism’s linkages to other-sectors and the good track record of APIX to date, APIX should continue to manage investment promotion for tourism and retain its advisory/supervisory role during disbursement of investment funds.

Currently, SAPCO has land management and facilitation responsibilities, in coordination with local and central government authorities, for investments in the Petite Côte. An evaluation of SAPCO will be needed to assess its current capacity to manage a new regional development plan. Similarly, institutional arrangements will be called for in other prime tourism regions where tourism development plans are proposed and where substantial investments are targeted.

A strong program of investment promotion with the target of upgrading the quality of the tourism sector in Senegal cannot take place until the constraints outlined in this report and policies to improve the management of the sector have been addressed. Therefore, a major investment promotion should be undertaken only after a four-to-five year program of improved planning for and management of the tourism sector.

CONCLUSIONS AND RECOMMENDATIONS - THE VISION FOR THE TOURISM SECTOR

For the foreseeable future, Senegal may continue to be dependent on tourism for significant contributions to foreign exchange earnings, employment and tax generation, and as a regional development tool and catalyst for overall economic growth. Participants at the recent *Journées nationales de concertation*, confirmed decisions made during public-private consultations in 2000 that Senegal should aim for a target of 1.5 million visitors by the year 2010. This target implies an increase of 300% in tourist arrivals in the ten-year period, i.e., a 14% average annual rate of growth, compared with 4.7% during the decade ending 2000 and 6.7% from 1996 to 2000. Those targets also require adding 20,000 beds throughout the country in areas of tourism potential -- a more than doubling in hotel beds in the ten-year period from 2000 to 2010. A related objective is to raise the quality of the tourism product in order to appeal to a higher-income market. To achieve these targets, Senegal will have to expand demand by tourists considerably and will have to attract substantial tourism-related investment.

Based largely on the quality of its assets, Senegal can, realistically, expect to achieve considerable expansion of demand. To attract the investments that will be necessary to accommodate the market expansion and the external assistance to help expand, diversify and support the tourism product, Senegal needs to create a sound policy framework for tourism. Such policies can be expected to improve the general business environment for other sectors too. The formulation of appropriate policies for the sector requires an ongoing dialogue between the public and private sectors and local stakeholders, and consensus within government about the operational requirements of and benefits to be obtained from an expanded and sustainable tourism sector. Specialized technical support will be required to achieve the corollary objective of improving the quality of the tourism product.

The ambitious targets for the year 2010 provide Senegal with a quantitative goal for the sector. Debate about whether or not the targets can actually be achieved by that date is less important than putting in place a road map that will achieve substantial growth. The following plan for the sector proposes three five-year stages — transition, expansion and consolidation. The consolidation stage from 2011 to 2015 takes the planning past the 2010 target date for the arrival of 1.5 million visitors. The plan is strategic rather than quantitative, giving it the flexibility to adapt to whatever level of tourists Senegal attains during the plan’s implementation. The objectives of the three plan periods are summarized below.

A Transition Period - 2002-2006

The review of the current state of the tourism sector suggests that Senegal cannot achieve its targets unless it introduces substantial changes in the way the tourism sector functions. In other words a “step” change, rather than minor adjustments, is required in policy formulation and dialogue between the public and private sectors, planning measures, technical capacity, and in the quality of institutions for marketing and promotion and in data management. An infusion of technical support to raise the quality, efficiency and sustainability of tourism will be needed. A main objective will be to ensure that Senegal achieves a balance appropriate to market demand in its mix of products on offer and that each is competitive in value in the international market. Growth will occur during this transition period as the quality of the product improves but accelerated growth will only be achieved once a major investment promotion campaign is undertaken at the end of the period in preparation for the expansion stage.

During this stage, Senegal needs to start Master Plans for its main existing or potential tourism areas to enhance the overall quality and image of the Senegalese tourism product. The objective of Master Plans is to conserve and enhance the value of each of the areas through environmental management plans, to create synergy between them, to make them more attractive for investors interested in quality accommodation and services, and to incorporate local communities in the tourism product. Studies of crosscutting themes that are common to all the areas are needed to help formulate policies for tourism at the national level, concerning, for example: airline capacity, access and price; internal transport; taxation and incentives; pricing, financing mechanisms and conservation measures for preservation of natural and cultural assets; creation of economic linkages between tourism and other sectors; etc. To compete successfully with rivals, Senegal needs an institution, such as a *Maison* or *Office du Tourisme*, that is responsible for a national marketing and promotion campaign and that is also a venue for a dialogue and cooperation between the public and private sectors and a center for information about the tourism sector in Senegal, including a national website and database.

Capacity building for stakeholders, including the Ministry of Tourism and the private sector, will be essential during this transition period. At the end of this stage, a follow-up to the *2002 Journées nationales de concertation* would leave in place a five-year strategy for development of the sector during the expansion stage of the vision. Also at the end of this stage, investment proposals derived from the Master Plans and studies could be presented to a forum of potential investors and donors for financing, in preparation for the expansion stage.

The Expansion Stage - 2007-2011

After the policy and planning initiatives undertaken in the transition period, this expansion stage should begin with an influx of investment as a result of the investment forum that ended the first stage. The forum should also have attracted financing for tourism-related infrastructure and technical support for SMEs to help them link into the tourism supply chain. During this stage the benefits from tourism should grow and should also be distributed among a broader range of beneficiaries. Under joint public-private management and with external assistance, data collection could be started and a methodology designed for preparation of a tourism satellite account that would provide the sector with a good management tool to track its contributions, impacts and linkages.

The tourism strategy formulated during the first stage should be kept under review to ensure its continuing relevance. The feedback from ongoing visitor surveys would guide the strategy as well as investment plans. Marketing and promotion campaigns undertaken in several source markets should continue. Results, in terms of the addition of a more diversified and higher-income clientele, as well as higher overall numbers of tourists, should become evident during this stage of the plan.

The public and private sectors would jointly evaluate management systems for the sector and would keep themselves informed about innovation in the sector elsewhere in the world. A number of issues should be kept under continuous review and appropriate action taken if or when necessary: the adequacy and competitiveness of air access from major tourist markets; analysis of infrastructure needs and its financing; monitoring of tax and incentive legislation to ensure that Senegal's business climate attracts investors and allows entrepreneurs to make reasonable profits, while also ensuring that the State covers its expenditures for the tourism sector; access of local entrepreneurs to financing, both for new investment and for improved maintenance, remodeling and refurbishing of existing accommodation; training needs throughout the sector, including the study of the English language; monitoring social, cultural and economic externalities; and the potential costs and benefits of the cruise market.

Controlled expansion would be encouraged through Master Plans for new areas with tourism potential, with a focus on using tourism as an economic base in less developed regions. Pro-poor policies should continue to target poverty alleviation through tourism. Cultural assets, including built and living cultural assets at the community level, as well as the current products of talented musicians, artists and artisans, including handicrafts, could be identified and promoted as part of the tourism product to enrich it and to expand the beneficiaries of tourism. Based on evaluations done in the first phase, Senegal's natural parks in tourist areas could be made accessible to tourists under management plans that provide financing for and protect the biodiversity and wildlife of the parks and bring benefits to surrounding communities. Environmental goals of zoning, physical planning and coastal zone management, should be pursued and go hand in hand with achievements by the hotel sector in obtaining green certification. At this stage, the Government could support the creation of regional tourism markets and also introduce incentives for regional and domestic tourists to use accommodation and tourist facilities during the shoulder and low seasons in Senegal.

A new Investor/Donor forum geared to high-quality hotels, tourist facilities and services and tourism-related infrastructure, including infrastructure for communities in tourist areas, should conclude this expansion stage.

The Consolidation Stage - 2011-2015

Senegal should now be a competitive international tourism destination. As a result, Senegal should have greater bargaining power with international tour operators, airlines and cruise ships as to the prices it charges for use of its facilities. The improved business climate and transport access will benefit the entire economy. The public and private sectors will work hand-in-hand to address constraints and introduce innovations to keep the business environment conducive to investment and the sector competitive. Tourism will be an important, but not exclusive, economic base in more regions in Senegal and more communities and local entrepreneurs will be linked into the tourism sector and obtain direct benefits from it. Through the development of a more diversified tourism product that includes cultural and natural assets and local communities and a wider range of source markets, seasonality should be less defined than in 2002 and the average length of stay should have lengthened, with a directly positive impact on occupancy levels in hotels. A review of the current state of the sector with identification of bottlenecks, constraints and potential should be undertaken at the mid-point of this stage. The social, cultural and economic impacts of tourism should be assessed. The results should be incorporated into a new five-year strategy for the sector with recommendations and implementation measures.

The *expected outcomes* of these three stages will be:

- Improved tourism capacity at all levels of the public and private sectors;
- Enhanced dialogue and cooperation about tourism between the public and private sectors;

- Better policy formulation and physical planning for and improved economic, environmental, cultural and social management of the tourism sector;
- Greater numbers of Senegalese become involved in tourism at all levels;
- Improved ways of life and incomes for poor Senegalese previously marginalized from tourism as a result of targeted interventions and the adoption of pro-poor tourism policies by the public and private sectors;
- A tourism sector that has strong backward and forward linkages within the economy, and generates high levels of employment, taxes, and foreign exchange revenues and diversifies the economic base for more and more regions in Senegal; and
- Senegal becomes a significant, competitive and internationally recognized tourism destination.

Annex 1: People Interviewed

MINISTERE DU TOURISME

S.E le Ministre du Tourisme,
Hamet SALL, Directeur du Cabinet du Tourisme
Elimane Hamidine SY, Directeur des Investissements
Demba DIALLO, Division Marketing
Mohamed SYLLA, Inspection régionale du Tourisme

MINISTERE DE L'ENVIRONNEMENT

M. P. BALDE, Directeur-Adjoint de l'Environnement
Ernest DIONE, Chef de Division des Etablissements Classés

APIX

Mme Aminata DIANE, Directrice Générale
Hamath SALL, Directeur de la Promotion de l'Investissement

SAPCO

Ndiouga SAKHO, Directeur Général
Directeur, Bureau de Saly
Directeur Financier
Abdoulaye NDIAYE, Directeur Technique

SECTEUR PRIVE

Mohamed RACINE SY, PDG, Sénégal Hôtels
Roger EHRMANN, Gérant, Sénégal Voyages
Aïssa DIONE, PDG, ATISS
Mamadou DIALLO, Syndicat des Agences de Voyages (Nouvelles Frontières)
Victor NDIAYE, Performances Management Consulting
Charles SENGHOR, Performances Management Consulting
Virginie DUMONT, APITS
Oumar DEMBA, Front Office Manager, Hôtel Méridien
Ndiaga SOW, Directeur Financier, Hôtel Méridien
Denis KERNEIS, Administrateur, Hôtel Espadon, Saly
Michel ROBERT, PDG, Hôtel Espadon
Christian MAURY, DG, Savanna Hôtel
Jean Charles TALL, Architecte

BAILLEURS DE FONDS

John MCINTIRE, Directeur, BM
Demba BALDE, BM
Antoine Courcelle LABROUSEE, SFI
Andrea NICOLAJ, Conseiller Economique, Union Européenne
Bernard KLEIN, Coopération Française
Aminata LY, Ambassade du Canada
Laba TOURE, Administrateur des Programmes, PNUD

Annex 2: Demographic Characteristics Of Birdwatchers In The USA And UK

Although demand for birding in Senegal is still small, a good reason for targeting the birding market is its size and rate of growth in both the US and Europe. Details of the characteristics of US birders are summarized in the section that follows and comparable information is shown below for the UK market. Although demographic data for the rest of Europe is not readily available, that target group can be reached initially through UK birding magazines and websites, which are widely read and visited by other Europeans. The Canadian market can also be reached initially through targeted advertising in Canada's main birding magazine.

The US Birding Population

Based on surveys conducted by the US Fish and Wildlife Service in 1996, the following are the demographics of the US birdwatching population:

- 54 million people consider themselves birders; the number has risen 155% since 1983;
- US birders earn, on average, \$56,000 per year and have a median age of 44;
- Birders are well-educated, with an interest in travel, luxury goods and photography; and
- They spent \$31 billion on birding trips, books and equipment in 1996—a 31% increase over 1991.

In the October 1996 monthly newsletter, *Winging It*, of the American Birding Association (ABA), Greg Butcher reviewed the findings of the ABA's 1994 survey of its members. The characteristics of the ABA membership in 1994 were:

- Average age 53, with 26% in their forties and the same in their fifties, 19% in their 60s and 12% in their 70s;
- Average family income is \$60,000, with one-third having an income over \$75,000;
- 80% have a Bachelor's degree, 43% have a Masters or Doctorate;
- 65% are male; and
- 61% bird less than 50 days a year; 24% bird between 51 and 100 days, 15% bird more than 100 days.

In 1995 the ABA's membership was at 15,012 and in 1998 had increased to 20,456.

The travel characteristics of US birders are:

- Avitourism keeps growing as travel becomes cheaper and easier;
- The average birder annually spends more than \$350 on travel and paraphernalia related to birdwatching. Committed birders spend much more—on average, active birders annually spend about \$2000 on birdwatching, with half that amount on travel (1990 data from a study by Wiedner and Kerlinger);
- 49% of ABA members travel out of their home country to bird;
- When traveling outside the US, 32% of ABA birders take an organized bird tour;

- 11% of ABA birders go to Mexico or Central America, 6% go to South America, 5% to Europe, 4% to Africa, 3% to Australia and 1% to Antarctica; and
- The five US States with the most wildlife watchers (of which the vast majority are birders) are, in descending order: California, Florida, Pennsylvania, Texas, Illinois.

According to a 1997 article in Newsweek magazine by Steve Murdoch, quoted in BirdWatchers Digest, birdwatchers are expected to have the highest growth rate in numbers in the next fifty years, compared with those who walk, do saltwater fishing, play golf and tennis, or backpack.

The travel requirements of birders are relatively simple according to the ABA survey. They want:

- Information: birding guides, up to date checklists (with seasonal and habitat abundance data), a daily birding log, informed interpreters (about local specialties and unusual rarities);
- Access: roads, trails, boardwalks, blinds, boats, etc.; and
- Amenities: bathrooms, shade, escape from insects and extreme temperatures, drinks, food, lodging value.

The UK Birding Population

The Royal Society for the Protection of Birds (RSPB) advertises itself as Europe's largest wildlife conservation charity, supported by over one million members, including nearly 140,000 under 16 years old. RSPB reveals the result of market research into its membership, as follows:

Gender: 52% female/48% male.

Age distribution: 79% of the membership is remarkably evenly distributed over three age groups between the ages of 45 to 74, with the highest (23%), in the 65-74 year group. 7% are 16-34 years old and 13% are 75 to 84+ years old. 29% have been members for from 5 to 10 years and an additional 36% for over 11 years.

Working Status: Retired: 43%; full-time: 35%; part-time: 12%; not working: 10%

Social Grade: 70% of RSPB members are in the three highest income grades, compared with 49% of the general population.

Distribution of members across regions: 22% are in the SE; 19% in the NW and in the Central region; 12% in East Anglia; 10% in the SW; 6% in the North; 4% in S & W Scotland and in Wales; and the remainder are scattered over East Scotland, Northern Ireland, North Scotland and overseas.

Type of membership: single: 40%; joint: 35%; family: 8%; others: 17%.

A 1998 survey showed that a minimum of 36% of the RSPB membership was also a member of at least one other environmental/conservation organization, suggesting that other facets of Senegal's natural assets would appeal to many UK birders. Furthermore, an unknown number of UK birders are not members of the RSPB, so the market is larger than one million by an unknown factor.

Annex 3: Pro-Poor Tourism¹⁶

Three organizations—the Centre for Responsible Tourism, International Institute for Environment and Development and Overseas Development Institute-- joined in 2001 to establish a website on pro-poor tourism¹⁷ (www.propoortourism.org.uk). In their first briefing paper, the authors¹⁸ define pro-poor tourism: “PPT is not a specific product or sector of tourism, but an overall approach. Rather than expanding the size of the sector, PPT strategies aim to unlock opportunities—for economic gain, other livelihood benefits, or engagement in decision-making—for the poor.”

The authors ask why bring a poverty perspective to tourism? “Certain characteristics of tourism enhance its pro-poor potential. It can be: labour intensive, inclusive of women and the informal sector, based on natural or cultural assets of the poor and suitable for poor areas. Harnessing tourism for pro-poor growth means capitalizing on these features, while reducing negative impacts on the poor. Potential for *change* stems from the continued “master-planning” role of governments, and strong commercial and international interest in sustainable tourism.”

The strengths of PPT identified so far are:

- The tourism sector can be “tilted” at the margin to expand opportunities for the poor, through diversification into culturally-based products, expansion of business linkages, redistribution of assets (equity, land) to the poor, and inclusion of their voice in planning;
- The capacity to increase demand for goods and services provided by the poor and increasing their asset base;
- PPT has the dual advantage of supporting diversification and being particularly relevant to remote areas;
- PPT can contribute to changes in policies and processes as the poor are recognized as legitimate stakeholders; and
- The existing “sustainable tourism” movement can be harnessed to include poverty as well as environment in its agenda.

International experience tends to indicate that targeted interventions are often required to ensure that tourism does benefit the poor. “Pro-poor tourism strategies are concerned specifically with impacts on poor people, though the non-poor may also benefit. Strategies focus less on expanding the overall size of tourism and more on unlocking opportunities for specific groups within it (on tilting the cake, not expanding it.) However, these strategies have to be integrated with general tourism development for two reasons: mainstream activities (such as tourism planning) need to be influenced by pro-poor perspectives; and pro-poor tourism cannot succeed without successful development of the whole tourism destination.” (DFID 1999)

¹⁶ Parts of this Annex were included in an annex to the draft Madagascar: Tourism—Economic and Sector Work, dated November 30, 2001, written by D. Elizabeth Crompton (consultant) with support from Iain T. Christie and Amit Sharma (consultants).

¹⁷ For purposes of this report, the terms “pro-poor tourism”, community- or village-based tourism, and rural tourism are used interchangeably.

¹⁸ Harold Goodwin (CRT and the University of Greenwich), Dilys Roe (IIED), and Caroline Ashley (ODI)

Criteria for Success of PPT Projects

There is now a considerable body of international experience with PPT from which some basic criteria for success can be drawn. This section contains a brief overview of the two main types of projects and some operating principles that can be drawn from experience elsewhere.

There are essentially two types of community-based tourism. In one case, an entrepreneur makes an investment in an area where local people largely own the assets. The entrepreneur gives value—through attracting tourists—to the assets and involves the local community to a greater or lesser degree in the operations. The other case is where a local community of its own initiative, but generally with assistance from a government agency or an NGO, provides facilities for tourists that may extend to accommodation but could merely be provision of reception facilities and guides to view a cultural or natural asset that is locally owned.

The *first type of community-based tourism* is well-illustrated by the award-winning Rainforest Expeditions (RFE) initiative in Tambopata, Peru started by two young entrepreneurs, which is described in the Annex. The premises on which RFE was based have been critical to its success and, because they are of universal application in all tourism projects, are summarized below in an assessment by the managers¹⁹:

“Although the community training and empowerment are vital to the success of the operation, they will be useless if Posadas Amazonas (the RFE Lodge) does not sell and attain break-even or better occupancy rates. This requires solid product development and marketing strategies. The Tambopata ecotourism market is highly competitive with other several other entrepreneurs selling similar two-to-four-day products to over 10,000 nature tourists annually. The RFE/ENC projects are, therefore, based on the following market concepts:

- The experience must produce excellent probabilities of quality encounters with spectacular and, in some cases endangered, Amazonian wildlife at accessible locations. This is achieved through the utilization of the ENC members (the local village people) unsurpassed knowledge of the rainforest; and
- A growing number of tourists want to support legitimate ecotourism ventures and favor locally owned enterprises. They want to interact with local communities in an authentic not contrived environment as they do with the ENC throughout their visit.”

The third factor in the success of the Peruvian venture, according to the managers, is that they provided very comfortable, almost luxurious, accommodation and facilities for their guests. The extent to which tourists are willing to “rough it” is related to the price paid, the scarcity of the wildlife or other natural assets being viewed and to the consumers’ preferences. As a rule of thumb, most tourists from developed countries accept rough terrain and primitive facilities during the day, but expect baths or showers (preferably hot) at night, clean and safe facilities, and reasonably good food and drink.

The RFE managers regularly measure the social impacts of the Posadas Amazona project, as well as its environmental and cultural impacts. They note that their initiatives have effectively led to wildlife conservation and stimulated scientific research in ways similar to those produced by government or NGO-funded conservation and research programs. Conservation International agreed when issuing its award as follows: “Rainforest Expeditions has created a powerful model of ecotourism, one that increases

¹⁹ Eduardo Nycander and Kurt Holle. A description of the project appears on Conservation International’s website and an article by Holle appeared on www.planeta.com.

understanding of tropical habitats, raises the awareness of tourists and gives local people new prosperity and new reasons to protect their wild lands”.

The *second type of community-based tourism* is a community-driven effort to give value to a locally-owned asset and to provide reception facilities around it. The success of the venture generally depends on the existence of an already thriving tourism sector, so that tourists already in the country can be induced to visit the community as part of the overall destination experience. The tourism asset can be either nature or culture based and is generally a mix of both, because one of the attractions for tourists is the living culture of the community. This type of tourism diversifies the national tourism product and is the equivalent of creating a new niche market within a more broadly based traditional destination.

The small scale of community-based projects can challenge their commercial viability. The financial viability conditions that apply to larger ecotourism projects, such as RFE, also apply to village initiatives. The ecotourism product must be of sufficient quality and the related services of sufficient efficiency to provide the tourist with value for money and with an experience that helps to promote the overall national tourism product. As one means to establish the project’s marketability, the opinion of tour operators who could include the project in their tour should be sought from the outset. Any lodge in the vicinity might also be willing to promote the village project to its guests, as a means of creating an additional experience for them.

As a precaution against market uncertainties, tourism activities should not at the outset, if ever, preclude the continuation of existing income earning activities within the community. This entails starting small and ensuring that village expectations are not overly optimistic about the new venture. Such niche markets have to be specifically targeted with carefully designed and funded measures that protect the culture and traditional occupations of the community and limit access to the assets in line with their carrying capacity. As a *sine qua non*, the community needs to be involved at the earliest stages of planning and a village ecotourism project must conform to and not conflict with local mores. Community-based tourism should be regarded as a means to protect the assets of poor communities while simultaneously diversifying their sources of income and, hopefully, raising the level of such income as equitably as possible throughout the community.

Communities engaged in tourism revenue-generating activities will normally require technical assistance from experienced NGOs for:

- Better research and planning for projects including community involvement and awareness;
- Facilitating community access to services such as feasibility studies and planning, institution building, negotiation, contracting and management of small businesses;
- Issues of tenure over land resources (often national policies do not support community efforts);
- Facilitating joint ventures between communities and the private sector;
- Developing practical marketing policies;
- Selecting and setting up SMEs and micro-enterprises;
- Access to finance;
- Basic skills in financial planning and book-keeping;
- Training as guides;
- Preparation of information materials;
- An equitable distribution of the benefits to the members of the community; and
- Technical know-how in the upkeep and maintenance of the facilities.

Senegal has a considerable incentive through tourism to strengthen and coordinate a national effort to keep alive its rich and diverse traditional cultures. With an integrated and well-designed policy for cultural heritage and the arts, implemented at the national and regional level, Senegal would be able to offer tourists a more vibrant cultural experience. This would attract visitor expenditures, and, in the process, give value to and help preserve the country's built and living cultural heritage, as well as enhance the income generation potential of villages.

A measure that was once proposed by the Ministry of Tourism and Transport in Fiji might be suitable for transplant, appropriately adapted, to Senegal. A small and technically orientated "Ecotourism and Village-based Tourism Committee" could be established to liaise with the various agencies engaged in ecotourism, collate information about the activities, and monitor their development. To the extent possible there should be little additional reporting burden on the villages or the agencies assisting them. The main function of this Committee would be to collate information and experience of what worked and what didn't, which could then be shared with new villages wanting to engage in tourism.

Selected International Pro-Poor Initiatives

DFID. Interest in "pro-poor tourism" has grown in the last few years. The UK Department for International Development (DFID) commissioned a study: Sustainable Tourism and Poverty Elimination, in early 1999. DFID presented a summary of the study to the Seventh Session of the UN Commission on Sustainable Development in April 1999. A major finding of the study was that tourism currently makes a significant contribution to the economies of poor countries: "80% of the world's poor (below US\$1 a day) live in 12 countries. In 11 of these, tourism is significant and/or growing. Of the 100 or so poorest countries, tourism is significant in almost half the low income countries and virtually all the lower—middle income countries (accounting for over 2% of GDP or 5% of exports)."

DFID established "The Tourism Challenge Fund (TCF)", which was managed by Deloitte & Touche, (London)²⁰. The Fund aimed at encouraging private sector-led tourism initiatives that would benefit the poor in developing countries where there is a growing tourism industry, or where tourism is a strong part of the economy. The initiatives designed new approaches to tourism strategies and activities that benefit the poor. An independent panel evaluated initial proposals. Detailed proposals were invited from those that were short-listed and cost-sharing grants were awarded to those initiatives that best met the Fund's objectives. In December 2002, DFID merged the TCF with the Business Linkages Challenge Fund (BLCF). Tourism projects continue to be funded under the BLCF, which has a higher maximum limit than the TCF, i.e., up to GBP 1 million. Geographical coverage is more limited than the TCF in that there have to be linkages between or within Central and Southern Africa and between and within eligible territories in the Caribbean, as well as in eligible countries where the business link is with the UK. The BLCF is managed by Deloitte & Touche (London), Project North-East and Enterplan.

Among the initiatives that won approval under the TCF is "Traveling Fair: Developing and Marketing Tourism Ventures with Southern Communities". The objective is to enable coffee-farming communities in two communities in Tanzania and Peru with established tourist industries to diversify their income streams by developing sustainable, community-owned tourism enterprises at a time when coffee prices were at an historic low. The communities wish to develop tourism ventures that will complement rather than conflict with the members' core coffee business. Previous community efforts to do so have failed because of lack of experience and the required skills. To ensure the success of the proposed ventures, Twin, the proposal proponent based in the UK, has established:

²⁰ The TCF website is www.challengefunds.org.

- A partnership with Tribes Travel, a UK tour operator with industry expertise that also was awarded “Most Responsible Tour Operator” status by Tourism Concern and International Travellers World, which promote “ethical” tourism. (This may be defined as respect for the people and their customs in tourist areas, as well as support for sustainable tourism that pays “fair market” prices for goods and services and promotes environmental sustainability);
- A marketing link-up with Twin’s sister organization, Cafedirect, the leading UK Fairtrade coffee brand (and fastest growing brand in the mainstream coffee market);
- The proposed ventures will be developed in Kilimanjaro and Machu Picchu, which are two of Tribes most popular tourism destinations, as well as areas where Cafedirect has recently launched “gourmet coffees”. Each venture will:
- Develop a tourism product, i.e. guided trip or excursion, in collaboration with the local community and identified local consultants;
- Market the product as a segment of Tribes’ holidays; and
- Promote the product in conjunction with sales of Cafedirect’s ‘Kilimanjaro Mountain Special’ and ‘Organic Machu Picchu Mountain Special’ coffee lines.

Rain Forest Expeditions (RFE), Peru. RFE won Conservation International’s 2000 Ecotourism Excellence Award, in the company section. Two young graduates of the University of Peru, Eduardo Nycander and Kurt Holle, founded Rainforest Expeditions in 1989. Their objective is to initiate business and local community joint ventures in tourism that are not only successful in empowering local communities and conserving natural resources, but also constitute sound business practices.

The Tambopata Research Center. The first venture consisted of a thirteen-bedroom lodge in the uninhabited nucleus of the pristine Tambopata Candamo Reserved Zone in southeastern Amazonian Peru. The lodge was designed to forge an innovative link between science and tourism. The Tambopata Research Center is a biological field station where tourists experience the rainforest alongside working scientists. The local Ese’ija Native Community (ENC) provides the guides. Wildlife sightings include the harpy eagle, giant river otters and jaguars, all of which are endangered species. A dozen or so research papers by prestigious academics have been published from the Research Center activities.

Rainforest Expeditions (RFE) pursued a policy of cooperating and integrating the ENC into its ecotourism project at both a personal and institutional level. The ENC numbers some 400 individuals in 83 households. They subsist off small-scale agriculture, ranching and timber extraction. The community was initially skeptical of RFE because two decades of a nature tourism industry, profitable to its promoters outside the region, had left little benefits in the community. In late 1995, after two years of exposure to RFE, the president of the ENC asked the RFE managers to involve the ENC at a community rather than individual level in its ecotourism plans.

Posadas Amazonas. As a result, the ENC and RFE signed a 20-year contract forming a for-profit association in 1996, in which 60% of the profits accrue to the ENC and decision-making is shared. Posadas Amazonas (PA), the first completed product of the joint venture, is located in ENC communal lands on the outskirts of the Tambopata-Candamo Reserved Zone. The lodge has 24 rooms designed to maximize comfort without losing authenticity, combining native architecture and materials with ecolodge construction techniques. Four-day trips to PA include exploration of the area’s outstanding natural resources, as well as visits to one of the community’s farms and an ethnobotanical tour guided by an Ese’ija native. The byelaws provide for a 2000-hectare reserve around the lodge to ensure the protection of the natural assets that surround it.

The contract defines the management and financial responsibilities of each participant, the land-use terms, the obligations and rights of both participants, and conflict resolution procedures. Work procedures, project policies, marketing strategies, infrastructure and itinerary development, are all designed and approved by RFE and the ENC, as represented in its ten-member Ecotourism Committee. Community members are trained to fill all lodge positions, products are purchased from the community if they equal market quality and price, and the ENC's cultural resources are gradually being incorporated into the tour programs. In 20 years, the ENC will take over the business in its entirety.

The company has actively recruited and received funding and support from the MacArthur Foundation, the Canadian-Peru General Counterpart Fund, the American Bird Conservancy and the Backus Foundation for community training, infrastructure development and wildlife research. Catalyzed by the success of PA, the ENC has formed committees to lead education, handicraft, cultural rescue, agriculture and urbanization programs in the community.

In its first year of operation, PA hosted over 3000 guests, who, when surveyed, reported a satisfaction rate of over 95% with the experience. The occupancy rate was 44%, which is reduced to 33% when only paying guests are included. The RFE managers are confident that the project will be profitable and that it is in line with their financial projections.

As both RFE entrepreneurs always underline, although the community training and empowerment are vital to the success of the operation, they will be useless if Posadas Amazonas does not sell its rooms and attain break-even or better occupancy rates. This requires solid product development and marketing strategies. The Tambopata ecotourism market is highly competitive with other several other entrepreneurs selling similar two-to-four-day products to over 10,000 nature tourists annually. The RFE/ENC projects are, therefore, based on the following market concepts:

- The experience must produce excellent probabilities of quality encounters with spectacular and, in some cases endangered, Amazonian wildlife at accessible locations. This is achieved through the utilization of the ENC members unsurpassed knowledge of the rainforest;
- Tourists are provided with a competitive and unusually comfortable, almost luxurious, lodge in the area. The facilities include private bathrooms, hot water, a bar and lounge. The lodge remains contextual with the environment through a combination of native construction techniques and materials and imported architectural design; and
- A growing number of tourists want to support legitimate ecotourism ventures and favor locally owned enterprises. They want to interact with local communities in an authentic not contrived environment as they do with the ENC throughout their visit.

The RFE managers note that these market-driven activities have effectively led to wildlife conservation and stimulated scientific research in ways similar to those produced by government or NGO-funded conservation and research programs.

Madagascar. The following case studies of existing community-based tourism initiatives in Madagascar illustrate how community owned assets could become part of the tourism product, with the benefits from tourism returned to the community. Because Madagascar's tourism is primarily based in fairly remote rural areas, the potential for replicating such experiences is high, though each context will require specific designs. The main requirement is good technical assistance to the local community in preparing and then managing the project.

USAID has already helped to fund programs executed by "Landscape Development Interventions" (LDI) that target linkages between tourism and poverty. LDI is a program financed by

USAID and executed by Chemonics International (a Washington DC-based consulting firm), under the aegis of the Ministry of the Environment. The objective of the program is to combat rural poverty while also protecting Madagascar's unique natural resources, in LDI's words "to anchor farmers and businesses to generate value from natural resources, instead of depleting them". Concretely, LDI promotes SME/micro enterprises that are both profitable and that conserve natural resources to the benefit of the local community. Ecotourism is a target area because it gives value to natural and cultural resources as tourism attractions, while also preserving them. Several projects have already been financed, such as those in the *Région d'Antsiranana*, which consist of:

- Assistance with funding applications that were submitted to a revolving fund financed by USAID (*Fonds d'investissement pour les entreprises favorables à l'environnement* (FIEFE));
- Preparation of management plans for areas defined as *Zones d'investissement écotouristiques* (ZIEs);
- Creation of the "*Eco-Tourisme Nord*" association for promotion of the region for ecotourism and the installation of a Tourism Office;
- Building of two ecolodges (that can house 4 people) in Ankara Ouest to ensure direct participation of the local population in the development of ecotourism; and
- Preparation of prototype EIAs and architectural plans for ecolodges.

In the *Isalo ZIE*, LDI has helped prepare the management plans for the RFTs and has begun the rehabilitation of roads around the reserve to enable local people to export their agricultural production to markets. The roads are also intended as concrete evidence that local people will benefit from the use of the land for tourism. Once hotels are in operation in the region, they should absorb part of the local agricultural and other production as well as local labor.

The *Revolving Fund*, FIEFE, started with a \$700,000 grant from USAID. FIEFE assists the local people to prepare feasibility studies and management plans for the project. Once the proposed project has passed through FIEFE's own review procedures it is presented to a local commercial bank. The Fund places the equivalent of the commercial loan with the *Caisse d'épargne* as a guarantee for the local entrepreneur. Currently, LDI is searching for supplementary funds to expand the revolving fund because of the demand for its financing.

WWF and KfW. Andringitra National Park in Madagascar was inaugurated in October 1999. The park is characterized by very high diversity in plant and animal life and a large variety of endemic species—including a recently discovered lemur, which feeds, with no ill effects, on a bamboo that has a high cyanide content. The Park is suitable for trekking and has spectacular panoramic views of the region. It lies between the longer-established Ranomafana and Isalo National Parks. KfW, the German development agency, World Wildlife Fund (WWF) and the Government have financed Park development. The pristine mountainous park became accessible to tourists when a road rehabilitation project was completed in 1999. The rehabilitation of the 47-km secondary road to the Namoly Valley was undertaken to facilitate the transport of agricultural products and to promote ecotourism.

Before the Park and the people living in the isolated valley were exposed to visitors, WWF recognized the need to minimize environmental and cultural change and helped the residents to draw up a four-point plan.

- A "benevolent guardian association", consisting of individuals living on the park boundary at strategic points was set up to register and control everyone entering the park. Half of all park entry fees in Madagascar are returned to local residents for community development projects. The

guardians also register the entry of local residents, in order to control illegal activities and conserve natural resources. Guardians are paid not in cash but in watches, notebooks and pens.

- An ecotourism pilot committee was established to address issues related to tourism development in the peripheral area of the park and to set guidelines to preserve the pristine environment and the chance for tourists to experience the rich local culture. Over 80% of the members are local residents and the rest are private tour operators, hotel operators, Government officials and NGOs, including WWF. Guidelines have been prepared that are distributed to each visitor that explain the importance of respecting local taboos and that define acceptable tourist behavior. The committee is also feeding information to WWW personnel for an Ecotourism Management Plan for infrastructure development in the peripheral zone of the park. In future, the committee will control the type and extent of hotel development that is permissible in the valley and ensure that local residents are considered for employment opportunities.
- A guide and porter association was created with assistance from WWF. The local resident's lack of formal education coupled with their cultural isolation initially handicapped them as much-needed guides and porters. Building on local knowledge of the natural resources in the park and local awareness of the potentially dangerous trekking conditions in the mountains, WWW initiated a guide training program, that included language training, information on the natural history of the area, first aid and techniques in dealing with national and international visitors. From the outset it was made clear that working as a guide or porter was not a substitute for farming but a source of supplemental income to help feed their families. When members of the association wanted to learn French to communicate with tourists, they paid a tutor with rice—the product of their subsistence farming. The same association voted to donate two days of work each month for trail maintenance in the park. From April to May 2001, over 120 individuals contributed 720 days of free labor to prepare the park for tourists.
- Park infrastructure was developed by WWF in collaboration with local residents. In two years over 50 km of hiking trails and three wilderness campgrounds were constructed in the rugged mountains. This has given local people skills in trail design, construction and maintenance.

Among the several issues that still need to be addressed are those of land tenure and capacity constraints. Legal counsel has been arranged by WWF, in collaboration with Landscape Development Interventions (LDI), which is funded by USAID, to assure that small hotel developments, which will initially be done by investors from outside the valley, will provide a direct benefit to residents and will avoid a transfer of communal lands with no local benefits. Efforts are underway to manage increasing numbers of tourists to minimize disruption of the local culture and environmental degradation.

Other Examples of PPT are becoming known throughout the world. In some cases Governments take the initiative and, in many cases, a prime objective is to help preserve the natural resources that attract tourists by giving local communities an economic reason to preserve the asset. South Africa, for example, creates incentives for tourism investors to incorporate local communities into the project; both the governments of Tanzania and Madagascar share National Park fees with local communities for development purposes. A large corporation in South Africa, Wilderness Safaris, has created a tripartite equity partnership with neighboring communities and the state conservation authority. A small commercial company in Ecuador, Tropic Ecological Adventures, runs tour packages with remote Amazonian communities.

Community or village-based tourism can be a tool to preserve a dying *cultural heritage*. The Wekso project in Panama is an ongoing community-based tourism project, which involves a collaboration between Conservation International (CI) and the Naso indigenous group, and is designed to protect the ecology and cultural heritage of the region. Through Wekso, members of the Naso Tribe have been

trained as eco-guides and are constructing an eco-lodge and cultural museum for guests and visiting researchers. The Naso Indians have retained their language, but older members of the tribe expressed concern about the loss of tribal traditions, and the tourism project has helped to revitalize these traditions.

Tourism can also help to revive or even initiate new *handicraft traditions* in villages, which can be sold to tourists. In a poor Zambian village ruled by a tribal chief that attracts tourists because of its proximity to Lusaka, handicraft training is one of the few opportunities to create income-generating activities. In Jamaica in the 1960s, Italian straw workers were imported to teach Jamaicans the art of straw hat and handbag making, which is now a major handicraft on the island.

More such initiatives are being started as the potential of tourism to have a beneficial economic impact on local communities becomes better understood. These international initiatives have been difficult to track down without a visit to the country or the specific site. More are becoming known and the 2002 Year of Ecotourism should lead to the publication of more experiences.

Annex 4: Note On Economic Rents In Tourism Development

Generally, economic cost benefit analysis will capture all streams of costs and benefits. The problem begins when there are benefits or costs not quantified, as is the case for some public goods, such as the environment. Tourism assets, often the outdoors and nature, are fixed and so will generate “rents” whose size will vary based on the assets’ scarcity²¹. These must be quantified and collected if conservation and tourism are to be sustainable. Countries own such assets and to the extent that citizens enjoy them, the fact that they are not quantified is not disastrous as all citizens share in owning and using the assets (but even in this case, there is the question of finding resources for management of the asset). Where assets are enjoyed by foreigners, however, if they use the assets at less than their value there is an implicit subsidy to the foreigner.

The question for policy analysts is how to capture these rents, which are in effect a fee for using the asset. This is a matter of some conflict between countries and developers/ owners who are reluctant to increase prices by paying for unquantified benefits. There are issues of equity and efficiency, but hotel taxes are an effective and equitable way of charging for use of tourist assets. Where access is controlled to areas such as national parks, user fees can be applied. Where enjoyment of the assets is more diffuse an arrival/ departure tax or visa is efficient but unpopular with consumers. There needs to be joint discussion between government and the industry to reach tenable positions and a level of predictability about funding levels.

²¹ This note is based on the Report “Tourism and the Environment in the Caribbean: An Economic Framework”, March 2001. John Dixon, Kirk Hamilton, Stefano Pagiola, Lisa Segnestam. Environment Department Papers. No. 80. The World Bank.

Annex 5: Environmental Management Systems In Tourist Accommodation

The Senegalese tourism sector needs to become better informed about the procedures for obtaining accreditation for improved environmental management. Once the process is undertaken, hotels and tourist services can expect to begin to receive environmental awards. Essentially, the hotels and service entities will be adopting environmental management systems (EMS) that meet international standards, such as those established by ISO 14001 for all economic activities and by Green Globe specifically for the tourism sector.

The process can be undertaken individually, as is generally the case with independent hotels, or collectively, as was done by an unrelated group of hotels in Negril in Jamaica, with financing from USAID, and has been done by hotel chains, such as Taj Hotels in India and InterContinental, among others. A collective approach could be the most cost-effective for a group or groups of hotels in Senegal, possibly managed by APITS, with the assistance of a donor agency. Decisions as to whether to join the process would be entirely voluntary.

An enormous amount of information is currently available on the subject. The quarterly report of the International Hotels Environmental Initiative (IHEI), which is easily accessible with its annual subscription of GBP 25, provides examples of good practices around the world. It also contains technical papers on specialised aspects of “greening”, e.g., waste water management; energy-efficient lighting; reducing kitchen waste; heating, ventilation and air-conditioning; etc. A large number of websites also provide information on the subject.

But, the hotels and service sector in Senegal will need assistance in identifying sources, in interpreting the information and in drawing up an appropriate EMS. An expert could write guidelines for the hotels and service sectors that are adapted to the specific conditions of Senegal. As an example, the Caribbean Hotel Association and American Express, jointly funded the preparation of: ‘Environmental Tool Kit for Caribbean Hotels’, prepared by a local consultant. Such manuals can help the local managers of the EMS to resolve questions and to pursue an action plan.

Annex 6: Tourism Clusters And Circuits Of Excellence

A possible development strategy for tourism in Senegal during the transition period would identify different tourism circuits that could be brought on stream immediately and that cater to different market segments and price levels of demand within each segment. The objective is to develop a number of destinations and a cluster of services within each destination that could be packaged for sale to a specific type of tourist, with the certainty that the entire circuit provides value to that tourist in his/her particular price range. Value in this sense means product excellence that makes it competitive with all other products in its price range, not just in Senegal but in every competing destination worldwide. Consequently, unless the destination is very small, a cluster of tourism services within the destination rather than the entire destination would be on each circuit. A specific destination could offer more than one nucleus of services and therefore be included in circuits catering to different price ranges.

The circuits would be specialized in the main segments of market demand that Senegal offers. They could be focused on one type of niche market but would also allow for mixing and matching of market segments. Ecotourists may wish to hike or boat through one destination, watch birds or wildlife in another, visit a cultural heritage site, and experience sun, sea and sand for a day or two. Similar mixes can be developed for tourists primarily interested in cultural heritage, or sun, sea and sand.

As a strategy, this allows for immediate, short, medium and long-term development of tourist circuits in selected price ranges. The destinations may initially be part of a circuit but may eventually develop into final destinations for all or part of the tourist stay, while also continuing to be part of the circuit. A number of circuits could be created immediately by selecting a package of services, classified by value, in existing tourist destinations. Successive circuits could be developed over time and brought on stream to coincide with expanding demand. The basic criteria for selection of the circuit and the nucleus of quality services in each destination would be to provide value to tourists in defined price ranges and market segments.

The one common denominator of the destinations on the circuit is the value of the product being sold in each destination. Needless to say this is the heart of the concept and requires the formation of a nucleus or cluster of services in each destination. The formation of the tourism nucleus can take place in several ways.

- (i) Private entrepreneurs in complementary activities may choose to align themselves by self-selection and/or group agreement in a nucleus. For example, a hotel manager, a taxi service, and a restaurant in a specific destination may work together to cater to the needs of a certain category of tourist from arrival to departure. A hotel or ground transportation company in Dakar or any other destination may agree to market (or work with a tour operator to market) that nucleus of services. In this case, the hotel manager and ground tour operator would have a vested interest in the hotel guest receiving value for the nucleus of services offered and could advise the service providers on appropriate standards and periodically monitor that those standards are being maintained.
- (ii) Once a reliable categorization system for hotels is in place—and ideally for services too—circuits could be developed according to where the appropriate nuclei of similar quality services for the price and facilities offered in each destination are located. In these circumstances, market forces themselves will identify circuits.

- (iii) External tour operators that are selling a package of tourist services in the country of tourist origin, will, working with local ground operators, classify each nucleus of services offered according to their comparative judgment about the value on offer. European tour operators are forced into closer inspection of the land-based portion of the tours they sell as a result of legislation in the European Union that makes tour operators responsible for the health and safety of the tourist, as well as for the value of the tourist services sold. In this case, the international and local tourist industry create the circuits of excellence.

For the idea of “circuits of excellence” to be accepted and acted on, it will have to be explained widely in Senegal. The best channel will be industry associations, such as APITS and SPIHS. Ideally, a fund and some technical assistance should be made available to help with the formation of the nuclei of services and the establishment of circuits. The idea is not new and the World Bank Group, for example, is partnering with a network of Southern African businessmen and women in the Southern African Enterprise Network on developing a tourism cluster among their members.

The objective of establishing a nucleus or cluster of tourist services in a destination is to ensure that the tourist receives value for money in the highly competitive international tourist market. The incentive to the local industry to improve its standards will be that the *Office du Tourisme* will be marketing Senegal as a quality destination and this will lead to increased demand for quality products. If the experience is sufficiently distinctive it will either bring the tourist back to Senegal or will generate good word-of-mouth recommendations to friends and relatives, which is after all, the cheapest form of marketing.

While the focus of a circuit of excellence tends to be on the built accommodation and services, it also requires a focus on the sustainability of the basic tourist assets that have made this destination a tourist rather than a mining, manufacturing or agricultural center. The tourist experience will be distinctive only if natural resources are pristine, habitat and wildlife are protected, cultural heritage and indigenous cultures are preserved, and local communities benefit from the tourism development, as is discussed in the main report

Once formed, the circuits would inform Senegal’s promotion strategy about the types of assets that can be sold and within what price ranges. The combined efforts of the public and private sectors in promotion should lead to the marketing of Senegal as a country with diverse, but accessible, tourism assets, with specialized market segments, and with distinctive products within each segment. The underlying theme would be the quality of the product and the value of the experience for the tourist because of the unique variety of endowments that is Senegal.

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STATISTICAL ANNEXES

**EVOLUTION DES DIFFERENTS PARAMETRES DU TOURISME AU SENEGAL
DE 1972 A 2000**

Table 1

Années	Nombre Réceptifs	Capacité Chambres	Capacité Lits	Arrivées non résidents	Arrivées Résidents	Arrivées Globales	Arrivées Croisiéristes	Nuitées non résidents	Nuitées Résidents	Nuitées Globales	Taux d'occupation (%)	Durée Séjour	Recettes Brutes (**)
1972	/	1366	/	69446	/	/	32079	255787	/	/	44,2	3,7	2
1973	24	1856	3340	109127	/	/	22762	462028	13643	475671	46,6	4,2	2
1974	25	2002	3611	124730	10403	135133	22661	651413	21155	672568	52,5	5,2	5
1975	33	2480	4781	128598	11344	139942	19548	666439	26211	632650	51,2	4,7	6
1976	36	2520	4856	136166	18530	154696	18669	603563	37490	641053	43,2	4,4	9
1977	45	2914	5602	168310	17749	185059	15863	710768	39752	750520	51,0	4,2	11
1978	55	3127	6320	193613	26159	219772	14527	885520	57066	942586	49,5	4,2	14
1979	56	3154	6420	198433	34946	233379	10334	869974	68217	938131	49,2	4,4	17
1980	82	3711	7550	186403	34088	220491	7738	862034	69553	931587	46,9	4,6	19
1981	101	4018	8093	194390	33723	228113	14118	951106	68302	1019408	48,1	4,8	22
1982	101	4282	8600	215718	29162	244880	5811	993417	59270	1052687	47,4	4,6	25
1983	104	4410	8814	233175	35190	268365	3507	1057380	68890	1126270	47,7	4,5	29
1984	110	4757	9515	233401	38085	271486	6362	1065770	72668	1138438	44,5	4,6	32
1985	115	5064	10165	241017	36767	277784	5436	1106723	65991	1172714	41,5	4,2	36
1986	119	5363	10857	235408	36050	271458	2419	1045525	70921	1116446	39,2	4,1	38
1987	136	5692	11731	235466	44021	279487	7056	1024804	83798	1108652	36,0	4,0	38
1988	141	6042	12182	255646	43865	299512	5432	1099420	80729	1180149	37,0	4,0	42
1989	142	6106	12298	259096	43141	302237	10275	1137921	76685	1214606	38,0	4,0	44
1990	142	6063	12230	245881	39782	285663	6057	1068160	73763	1141925	37,5	4,0	40
1991	171	6826	13652	233512	35767	269279	4839	1016001	67751	1083752	34,5	4,0	38
1992	188	7474	14947	245581	36023	281604	3400	1051191	69279	1120470	33,4	4,0	39
1993	189	7512	15008	167770	27544	195314	2641	672839	57523	730362	27,2	3,7	25
1994	190	7600	15200	239629	41945	281574	4385	1029596	87850	1117446	34,0	4,0	53
1995	208	7744	15560	279635	41679	321314	6398	1139258	85030	1224286	35,0	3,8	78,7
1996	214	7824	16095	282169	39942	322111	6032	1127067	78528	1205595	34,4	3,8	77,8
1997	227	8184	17032	313642	45027	358669	6115	1329470	99644	1429114	38,0	4,0	91,8
1998	233	8239	17147	352389	40116	392505	12716	1449358	76883	1526241	40,0	4,1	100,1
1999	245	8472	17586	369116	50906	420022	8863	1468713	91344	1560057	42,8	4,0	101,4
2000	263	9763	18340	389433	53298	442731	10992	1401470	105506	1506976	35,4	3,6	96,8

(**) EN MILLIARDS DE F CFA

(SOURCE : Ministère du Tourisme)

**EVOLUTION DES PRINCIPAUX MARCHES EMETTEURS
(1984 – 2000)**

Table 2

MARCHES EMETTEURS	1984	1985	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000
AFRIQUE	35 986	41 071	43 481	43 181	43 177	39 847	37 127	33 031	48 110	39 633	47 352	54 912	67 267	70 224	84 244	81 101	96 834
FRANCE	128 530	125 324	127 196	135 227	149 962	155 839	147 524	132 254	128 664	72 429	124 595	149 551	136 903	158 928	172 169	186 477	193 135
ALLEMAGNE	15 811	17 355	13 703	11 511	13 125	13 664	13 736	13 106	14 423	11 399	12 642	13 506	14 605	16 243	17 199	17 261	8 199
ITALIE	8 339	9 143	9 638	8 058	8 726	11 322	12 786	16 280	17 729	12 399	15 062	14 896	13 974	16 389	12 957	13 063	13 923
BENELUX	7 168	8 257	7 388	7 118	7 939	7 363	5 908	4 474	5 409	5 819	9 278	10 952	10 944	11 642	11 867	11 658	15 233
SUISSE	5 751	6 138	5 908	4 870	4 378	4 085	5 545	4 315	3 747	2 510	1 916	3 290	2 645	2 216	2 006	1 480	2 068
U.S.A.	11 488	12 147	10 588	9 014	8 454	9 452	8 736	6 220	8 955	9 044	8 356	8 634	10 915	10 186	10 099	8 409	12 017
CANADA	2 374	2 165	1 940	2 306	2 074	2 809	18 661	1 858	1 499	1 546	1 924	1 924	1 539	1 120	1 145	1 199	900
GRANDE BRETAGNE	5 420	4 387	3 478	2 994	3 749	3 064	3 457	3 533	4 583	2 059	2 215	3 010	2 600	2 232	2 942	2 054	4 533
PAYS SCANDINAVES	/	/	1 526	1 638	1 602	1 306	1 330	1 083	1 149	684	1 042	926	778	884	658	1 046	786
Total N.R.	233 401	241 017	235 408	235 466	255 646	259 096	245 881	233 512	245 581	167 770	279 635	279 635	282 169	313 642	352 389	369 116	389 433

N.B. : TOTAL N.R. = TOTAL DES NON – RESIDENTS

Source : Ministère du Tourisme

NUITEES DES NON RESIDENTS PAR REGION TOURISTIQUE ET PAR PAYS DE RESIDENCE IN 2000

Table 3

REGION PAYS DE RESIDENCE	DAKAR	THIES	Ziguinchor	FATICK	ST LOUIS	TAMBA	KOLDA	KAOLACK	DL & LG	TOTAL
EUROPE										
FRANCE	212914	501562	75968	26209	27465	3872	503	610	/	849103
ITALIE	8987	22068	11633	937	1809	223	24	177	/	45858
ALLEMAGNE	5803	65899	533	259	1101	150	41	0	/	73786
BENELUX	29158	31696	10810	6131	5072	150	23	84	/	83124
SUISSE	4603	7881	946	129	637	69	2	0	/	14267
ESPAGNE	11763	15440	6601	3434	2844	306	27	0	/	40415
GRANDE BRETAGNE	10453	117	939	433	782	75	15	0	/	12814
SCANDINAVIE	1191	148	396	112	167	20	0	0	/	2034
AUTRES PAYS D'EUROPE	25476	2642	1526	164	267	47	54	608	/	30784
TOTAL EUROPE (1)	310348	647453	109352	37808	40144	4912	689	1479	/	1152185
AMERIQUE										
USA	19810	1533	190	84	1924	133	66	84	/	23824
CANADA	1930	59	218	66	336	38	57	0	/	2704
AMERIQUE DU SUD	552	5	5	0	55	0	0	0	/	617
TOTAL AMERIQUE (2)	22292	1597	413	150	2315	171	123	84	/	27145
AFRIQUE (3)	202287	543	656	116	3337	537	932	0	/	208408
DIVERS (4)	12694	270	91	14	483	20	34	126	/	13732
TOTAL GENERAL (1+2+3+4)	547621	649863	110512	38088	46279	5640	1778	1689	/	1401470

Source: Ministère du Tourisme

DUREE DE SEJOUR PAR REGION (en jours, en 2000)

Table 4

ANNEES	1998	1999	2000
REGIONS			
DAKAR	2,9	2,8	2,4
THIES	6,1	5,5	5,6
ZIGUINCHOR	4,8	4,8	5,2
FATICK	2,6	2,3	2,7
KAOLACK	1,6	1,5	1,7
SAINT LOUIS	1,8	1,8	2,0
TAMBACOUNDA	1,4	1,7	1,6
KOLDA	1,6	1,8	1,5
DIOURBEL	/	/	/
LOUGA	/	/	/
TOTAL	3,9	3,7	3,4

Source : Ministère du Tourisme

ARRIVEES ET NUTEES MENSUELLES DES NON RESIDENTS DANS LES ETABLISSEMENTS D'HERGEMENT EN 2000

Table 5

ANNEES MOIS	ARRIVEES			NUTEES		
	1999	2000	2000/1999 (%)	1999	2000	2000/1999 (%)
JANVIER	37721	43177	14,5	165817	166780	0,6
FEVRIER	37814	41482	9,7	160652	160680	0,0
MARS	38515	33523	-13,0	161744	136012	-15,9
AVRIL	36001	37304	3,6	151693	143286	-5,5
MAI	24266	27236	12,2	89875	97902	8,9
JUIN	20090	24365	21,3	71896	78972	9,8
JUILLET	25585	26897	5,1	96093	93885	-2,3
AOUT	29561	29066	-1,7	110248	101688	-7,8
SEPTEMBRE	19808	23060	16,4	64852	65533	1,1
OCTOBRE	29993	30900	3,0	104583	102095	-2,4
NOVEMBRE	35765	36034	0,8	153136	126723	-17,2
DECEMBRE	33997	36389	7,0	138124	127914	-7,4
TOTAL	369116	389433	5,5	1468713	1401470	-4,6

Source : Ministère du Tourisme

ARRIVEES MENSUELLES GLOBALES DANS LES ETABLISSEMENTS D'HEBERGEMENT EN 2000

Table 6

RESIDENTS MOIS	RESIDENTS			NON RESIDENTS (2)	TOTAL GENERAL (1) + (2)
	SENEGALAIS	NON SENEGALAIS	TOTAL (1)		
JANVIER	2888	1181	4069	43177	47246
FEVRIER	2700	1005	3705	41482	45187
MARS	2688	893	3581	33523	37104
AVRIL	3176	2524	5700	37304	43004
MAI	2751	1188	3939	27236	31175
JUIN	3167	1378	4545	24365	28910
JUILLET	3417	961	4378	26897	31275
AOUT	4700	1171	5871	29066	34937
SEPTEMBRE	4160	870	5030	23060	28090
OCTOBRE	2964	952	3916	30900	34816
NOVEMBRE	3106	1146	4252	36034	40286
DECEMBRE	2696	1616	4312	36389	40701
TOTAL	38413	14885	53298	389433	442731

Source: Ministère du Tourisme

REPARTITION DE LA CAPACITE D'HEBERGEMENT PAR REGION

Table 7

REGIONS	ETABLISSEMENTS		CHAMBRES		LITS	
	1999	2000	1999	2000	1999	2000
DAKAR	54	57	3082	3380	6135	6403
THIES	38	40	2070	2224	4563	4706
ZIGUINCHOR	73	74	1876	1893	3818	3852
FATICK	23	26	478	505	1102	1166
KAOLACK	3	3	84	84	168	168
SAINT LOUIS	26	33	462	636	1010	1178
TAMBACOUNDA	17	19	263	827	480	557
KOLDA	7	7	122	179	240	240
DIORBEL	2	2	25	25	50	50
LOUGA	2	2	10	10	20	20
TOTAL	245	263	8472	9763	17586	18340

Source : Ministère du Tourisme

REPARTITION DE LA CAPACITE D'HEBERGEMENT EN LITS PAR CATEGORIE D'ETABLISSEMENT EN 2000

Table 8

CATEGORIES	CAPICITE EN LITS		2000/1999 (%)
	1999	2000	
<u>HOTELS D'AFFAIRES</u>			
4 Etoiles Luxes	2898	2898	0,0
4 Etoiles	880	1110	26,1
3 Etoiles	886	886	0,0
2 Etoiles et Autres	1456	1456	2,6
TOTAL HOTELS D'AFFAIRES (1)	6120	6388	4,4
<u>HOTELS DE LOISIRS ET VILLAGES DE VACANCES</u>			
4 Etoiles Luxes	1492	1492	0,0
4 Etoiles	3842	3842	0,0
3 Etoiles	1716	1900	10,7
2 Etoiles et Autres	4416	4718	6,8
TOTAL HOTELS DE LOISIRS ET V.V. (2)	11466	11952	4,2
TOTAL GENERAL (1) + (2)	17586	18340	4,3

Source: Ministère du Tourisme

ARRIVEES TRIMESTRIELLES DES CROISIERISTES AU PORT DE DAKAR

Table 9

ANNEES	1998	1999	2000	2000/1999 (%)
1 ^{er} TRIMESTRE	2710	2304	2751	19,4
2 ^e TRIMESTRE	2620	1709		/
3 ^e TRIMESTRE	/	/		/
4 ^e TRIMESTRE	7386	4850	8241	69,9
TOTAL	12716	8863	10992	24,0

Source: Ministère du Tourisme

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