

GOVERNMENT OF SIERRA LEONE

**TOURISM SECTOR
DEVELOPMENT STUDY**

REPORT

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REPUBLIC OF SIERRA LEONE

TOURISM SECTOR STUDY

Executive Summary

Sierra Leone has an impressive array of biodiversity, natural beauty and cultural resources to support tourism. Many visitors to the country come expressly for holiday and business, the rest travelling for other reasons but which include some tourism activity. Sierra Leone has the potential to welcome many more tourists if the sector's growth is well planned in a broad, multi-sectoral way – focusing on economic aspects, infrastructure and environmental and social concerns, particularly for community participation.

This report sets out a program for equitable development of the sector and evaluates the opportunities for growth and the barriers that currently hinder progress.

Tourism may be the ideal development tool for Sierra Leone because it can be a catalyst for economic growth and can create a number of positives to alleviate poverty and protect the environment. Tourism generates foreign exchange, as well as employment and government revenues through taxes. Local inputs should be used in hotel construction and in the operations of accommodation entities throughout the country. Tourism stimulates production of goods and services in a wide range of sectors and sub-sectors, e.g. construction, furniture and fittings, agriculture, fisheries, food growing and processing and light manufacturing, health water, education, handicrafts, and gemstones, as well as transport, telecommunications and financial services. The dispersion of tourist assets throughout the country should create pockets of economic growth in each of the regions. Sierra Leone should also explore options for creating regional tours as suggested above with other neighbouring countries on the continent, building on its own comparative advantage and harnessing that of other areas to create superior circuits.

“Pro-poor tourism strategies are concerned specifically with impacts on poor people, though the non-poor may also benefit.

Not all the constraints need to be removed simultaneously for tourism to succeed; and while tourism policy should focus on comparative advantage, it will be necessary to evaluate constraints both in terms of the barriers they engender and the cost of resolving them in specific contexts. Choice of tourism initiatives will be guided by consideration of these issues.

Furthermore, all tourism options cannot be developed in the short-run and choices will have to be made. Thus, a well-prioritised program will minimize additional investment in infrastructure by ensuring that new tourism investment will utilize existing or new infrastructure already in the pipeline, rather than designing tourism projects from the ground up.

If a regional approach is adopted, Sierra Leone could be one destination (offering its first rate natural resources and biodiversity) in a circuit that might include Senegal, Ghana and Gambia

Tourism as a Development Tool

The terms eco-tourism, nature tourism and tourism are used interchangeably. Although a distinction is made between eco-tourism and resort tourism, the latter is also primarily based on marine natural resources and its wildlife.

In Sierra Leone, where rural poverty is widespread and where the poor put stress on the natural resource base, tourism could generate positive benefits. Sierra Leone's assets extend throughout the country economic growth is created through tourism, in regions that have no alternative source of income and employment. In rural regions particularly, tourism helps to alleviate poverty by diversifying income sources.

Tourism properly managed, can help to preserve the environment, whether for eco-tourism or for resort-based tourism. Sierra Leone's rich natural resources and its coastal zone are among its most important fragile economic assets. The assessment of Sierra Leone's assets for tourism undertaken for this report suggests that the current small size of the sector reflects substantial unrealised potential. In the past, tourism has been considered at worst as a residual to conservation. However tourism is complex and requires its own analysis, particularly as it is one of the largest industries in the world and rapidly consolidating into a few large players.

Tourism development can also have negative impacts on residents. In rural areas, displacement of people from their land and competition for other natural resources such as water, forest, and wildlife are likely to be the key trade-offs. Pro-poor strategies should therefore focus on minimizing negative impacts as well as exploiting potential benefits.

Financing remains a major constraint on the expansion of the tourism sector within Sierra Leone, which is an important objective for outreach to poor communities. The absence of appropriate financing will also hold back the creation of clusters of excellent hotel and tourist-related services that are recommended in this report. Alternatively, they will be financed preponderantly by foreign capital, thus marginalizing local investors.

Comparative Advantage

Sierra Leone's tourism assets are unique and well developed could be placed among the prime tourism destinations in the world. Its sun, sea and sand assets are outstanding but compete with the other better-known and better-developed resort destinations along the coast of the Atlantic Ocean (Ghana,

Senegal and the Gambia). Sierra Leone also has the potential as a cruise ship destination. It has been in the past.

The Asset Base

Data about the tourism sector proper, on the demand side, are, however, poor. Information is unreliable about numbers of bonafide tourists as opposed to foreign visitors, their expenditures, average length of stay, distribution around the country, and their socio-economic characteristics. This information is essential to:

- Know the current size of the sector and calculate benefits from tourism
- Understand better what type of accommodation should be built where and which related services and products are essential

Whether the supply is appropriate for the types of tourists who visit Sierra Leone and for the locations visited, is to be investigated. Given the problems related to defining who is a tourist, estimates of foreign exchange and taxes from tourism cannot be reliable.

NATIONAL POLICY OBJECTIVES

The overall policy objective which Government should pursue for the development of tourism in Sierra Leone is to encourage the orderly development and growth of tourism in order to provide maximum benefit to the country and its people.

Government should therefore encourage tourism, so that it will:

- i. Significantly increase the country's capacity for generating foreign exchange
- ii. Create employment (directly and indirectly) opportunities for its citizens
- iii. Improve the quality of life of the men and women of Sierra Leone in general and the poor in particular.

Proposals

The Development of Tourism Act 1990 needs to be reviewed and strengthened to reflect modern day thinking in an industry as dynamic as tourism . This must be so , in order to strengthen the role of the National Tourist Board in the development of tourism in Sierra Leone.

Recommendations

The World Bank's current program in Sierra Leone is helping to remove constraints to development. With greater strategic focus, it could increase the outreach of tourism to rural areas and help alleviate poverty. Because tourism is cross-sectoral almost any donor-assisted activity could have a significant impact on tourism, as, for example, all infrastructure projects, including water, power, telecommunications, as well as health and education, if a focus on tourism is included as part of the relevant sector strategy.

The national transport plan will help to improve those roads, secondary airports and, possibly, ports and river navigation that would directly benefit the growth and/or expansion of tourism.

The rural roads project could be instrumental in opening up remote areas with tourism potential.

New projects in Sierra Leone should consider the impacts on and potential benefits to tourism.

Policy discussions with the government should include the need to improve the business environment for tourism and particularly, to adopt measures that will enable new investors to follow through on their investment plans.

PROGRAMMES AND PROJECTS FOR IMPLEMENTATION

In recognition of the fact that tourism is a combination of products and services provided to meet consumer, business and Government demand for travel in domestic and international markets, some programmes and projects for implementation by the public and private sector are recommended for consideration. Tourism resources could be tapped to provide the desired benefits to the country.

This is done with the conviction that government will endeavour to develop tourism as a national priority by creating the enabling environment, which induces investment, stimulates demand and encourages quality.

The following are recommended for action by the Government:

- A. The development of the tourist industry is a national priority. Government should therefore provide the necessary resources to ensure that the National Tourist Board and the Ministry of Tourism and Culture have the capacity to oversee its development in cooperation with other Ministries.
- B. The safety and comfort of visitors to Sierra Leone is a high priority. Passenger facilitation at, and transfers from, the airport should therefore be enhanced to encourage the influx of tourists and other visitors.
- C. The pursuit of sustainable tourism development should be a major focus of Government activities in the sector. Emphasis should therefore be placed on eco-tourism as a process of also alleviating poverty.

D. Existing barriers to growth of the industry should be removed by:

1. Placing education in general and training in the industry in particular in the forefront of tourism. Sierra Leone once educated some of the best brains and leaders in West Africa. It could regain this glory with substantial investment in quality education and training. The tradition of excellence in education can be brought back, to train the young men and women for technical and assembly jobs in relevant industries.

2. Developing and expanding infrastructure capacity particularly for airports.

3. Encouraging international financial institutions such as the World Bank and the ADB to support sustainable tourism infrastructure in lending priorities.

E. The procedure for acquisition of land for tourism development purposes should be streamlined to ensure that unnecessary bureaucracy is eliminated and investors are motivated.

F. The encouragement of private investment in the tourist industry should be a major objective of Government. Attractive incentives should therefore be provided for investors in the tourism sector.

The private sector should remain the principal supplier of tourism services and facilities while public investment will be generally confined to providing the necessary economic infrastructure e.g. adequate reception facilities for arrivals at the airport, adequate and reliable ferry services, and regular supply of electricity, good roads and good sewerage system. It should also be recognized that a co-coordinated intersectoral effort must be made if maximum benefit is to be gained from what could become one of Sierra Leone's greatest economic development possibilities.

Suggested Projects for Implementation

The following projects have thus been identified for possible implementation (not listed in any order of priority) before tourism can begin to make an impact

- a) Rehabilitation and Restoration of Bunce Island.
- b) The rehabilitation of the existing or construction of a new training institute.
- c) Rehabilitation of the Slave-route Project; Heritage trails at No 2. River ; Guma Dam
- d) The Review of the 1982 Tourism Master Plan with initial emphasis on the Freetown Peninsula Area.

- e) Chimpanzee Rehabilitation Project.(the USA has recently provided some funding for this project)
- f) The Management and Protection of Wildlife in the Outamba-Kilimi National Park.
- g) A comprehensive Marketing Plan which would create image and confidence building campaign in tourist generating countries abroad.
- h) Strengthening the Tourism and Environmental Acts; the respective boards, and obtaining accreditation for environmental management.
- i) Explore options for creating regional tours with neighbouring countries.
- j) Revival of the National Dance Troupe
- k) Establish market centres for the sale of local crafts by both men and women

Introduction

Poverty Reduction Strategy Papers (PRSP) describe a country's macroeconomic, structural and social policies and programs to promote growth and reduce poverty, as well as associated external financing needs. Governments prepare private sector representatives of the poor, donors and in Sierra Leone Civil Society Organizations (CSOs) (even those that may be out of favour with the government) pRSPs through a participatory process, including the World Bank and the International Monetary Fund (IMF). Special efforts may be needed to reach traditionally marginalized groups. There is no blueprint for participation, the nature of which will depend on local circumstances.

PRSPs aim to serve as the framework both for domestic policies and programs to reduce poverty, as well as for development aid.

The degree of poverty in any given country depends upon two factors: the average income level of the country and the extent of income inequality.

In order to convince the developed world that Africa is a safe investment, NEPAD has instituted a form of peer-review process that holds Heads of State accountable for their actions.

Tourism is one of the largest industries in the world. It is particularly significant as it benefits substantially a range of developing and developed countries across the globe. The sector is complex largely because of the interdependency between the global industry, largely managed in the developed world, and the destinations around the world for which it mobilizes visitors. A sophisticated supply chain and rapid consolidation in the nineties in airlines, hotel chains and tour operators/travel agents characterize the industry, which makes intensive use of knowledge management in its operations and of information technology in reservations and marketing. Within an individual country, tourism is also complex because of its cross-sectoral relationships and the interactions that are required for its sustainability between the domestic and foreign private sector and several branches of central and local government, as well as with local communities visited by tourists. The sector has the potential to attract investment in a range of accommodations and services, to generate investments in infrastructure that also benefit other sectors and communities, and to stimulate demand in other sectors.

The Sierra Leone Government in the sixties, mid seventies and early eighties provided leadership for the tourism sector by investing in the provision of accommodation facilities. The foreign private sector, mainly the French, also manifested some interest towards the end of the eighties by constructing some hotels along the Freetown Peninsula. These efforts however proved insufficient to sustain growth and development of the sector.

At present, the sector is experiencing a shortage and dilapidation of all the basic ingredients and a host of other complimentary services that can facilitate the development of a thriving tourist industry

The development community has recognized the potential poverty alleviation aspects of tourism and experiences are currently being collated into a

compendium of pro-poor tourism practices and policies. Because tourism is almost always dependent on an asset base that consists of natural resources, it is often used as a justification for conservation and as a means to raise revenues for that conservation. Tourism can provide an economic base for isolated regions of a country and can also contribute to regional economic integration. To realize its potential within a country, a better understanding of the tourism sector is required than is often available.

This report attempts to provide an initial overview of the tourism sector in Sierra Leone and recommend strategies for pro-poor tourism.

OBJECTIVE

OBJECTIVES AND SCOPE OF THE STUDY

In recognition of tourism's potentially important role within the economy of Sierra Leone and the need to define a strategy for the sector, the Government of Sierra Leone in 1982 commissioned Pannell Kerr Forster Associates to undertake a structured tourism development plan, under the aegis of the EEC, which would establish a framework and guidelines for the medium-term development of the sector, together with a short-term action plan.

The present

Government in pursuance of a programme for reducing poverty is, with funding from the ADB, now embarking on sector policies that will reduce poverty.

This paper seeks to look at how Tourism can help reduce poverty.

Background

Sierra Leone is a small country situated on the West Coast of Africa (about 74, 00 km²) with a population between four and five million. The country is endowed with abundant and diversified natural Tourism attractions, prominent among which are the beautiful sandy beaches, islands, highlands (mountains and hills), waterfalls, wildlife, agreeable weather, a rich cultural heritage and hospitable people.

By investing in the provision of accommodation facilities between the sixties and early eighties the Sierra Leone Government showed leadership in the tourism sector. The foreign private sector, mainly the French, also manifested some interest towards the end of the eighties by constructing the Africana Tokeh and St. Michael's Lodge in Tokeh and Lakka along the Freetown Peninsula. These efforts however proved insufficient after the rebel war to sustain growth and development of the sector.

Presently, there is a shortage of tourist hotels and dilapidation of all the basic ingredients and other complimentary services that can facilitate the development of a thriving tourist industry.

In order for the country to benefit from tourism resources, the attraction areas and the rich cultural heritage need to be reached and tapped; which means mechanisms have to be put in place to develop and improve basic and necessary infrastructures like road network, accommodation resorts, electricity, communication, entertainment facilities etc.

With the realization that tourism could contribute positively to the socio-economic development of the country, the Ministry of Tourism has established regional offices in the headquarter towns of Bo, Kenema and Makeni, with the main aim of diversifying and decentralizing tourism activities in the country.

The focus of the Ministry is to encourage the development, promotion and marketing of Eco-tourism products in the rural areas, which are considered to help maintain the cultural and natural environment (attractions) and at the same time improve the standard of living of the rural poor. Tourism has the potential to contribute to poverty alleviation in the remote rural areas of the country. Eco-tourism can be an engine of employment creation for the

deprived, underprivileged, marginalized rural youths (male and female) and women. This will prevent the mass movement of able-bodied young males and females; and women from the rural areas to urban towns and cities for job opportunities, with the main aim of generating net benefits for the rural poor, through their active participation and inputs.

An attempt is also made to report, analyse the current status of tourism, assess the quality of the database, identify constraints and propose a strategy to accelerate sector development.

The aim of Pro-Poor Tourism (PPT) is to increase the net benefits to poor people from tourism, and increase their participation in managing the tourism product. If more tourism can be developed in rural areas, particularly in ways that involve high local participation in decisions and enterprises, then poverty impacts are likely to be enhanced. The nature of rural tourism products, often involving small-scale operations and culturally based or farm-based products, can be conducive to wide participation. Tourism can also bring a range of other benefits to rural areas, such as infra-structural development and spin-off enterprise opportunities.

Goal:

The goal of the tourism sector review is to prepare comprehensive, realistic and cost effective development strategies in the tourism industry based on inputs from principal Tourism Industry Stakeholders and actors. The strategies to be developed are expected to promote growth in the sector and reduce poverty.

Purpose:

The purpose of the project is to review the Tourism Industry activities and management structures and to provide a structural framework for future development and promotion of tourism activities in the country as a whole.

CHAPTER 1

1.1 OVERVIEW.

1.1.1. COUNTRY LOCATION

The Republic of Sierra Leone is situated on the West Coast of Africa and is bounded on the north-west, north and north-east by the Republic of Guinea, on the south-east by Liberia and on the south-west by the Atlantic Ocean. The coastline extends from the boundary with the Republic of Guinea at the mouth of the Great Scarries River to the boundary with Liberia at the mouth of the Mano River, a distance of some 340 kilometres.

The area of Sierra Leone is 73,326 square kilometres.

1.1.2. CURRENT POSITION OF TOURISM

(1)Assessment Of The Tourism Sector

Until the beginning of the 1990, tourism in Sierra Leone grew slowly but steadily, reaching close to 30,000 visitors by air, in 1990. However, the effects of the armed conflict caused its collapse and the degradation or closure of some existing hotels and other tourism infrastructure. Statistical information available for recent times reflects the sharp decline of the industry.

At the present time, the tourism sector in Sierra Leone is relatively undeveloped and is virtually confined to the Freetown Peninsula. New hotels have been constructed and some of the ones, which were destroyed, rehabilitated and put back into service.

Of the estimated 30,000 visitors to Sierra Leone's hotels in 1990, only some 5500 were international recreational tourists staying at the three leading hotels. The balance was composed of business and domestic travellers. Then the bulk of international tourists originated from France and the United Kingdom who are attracted to Sierra Leone by its fine beaches and climate during the European winter. The tourist season is concentrated in the November to March/ April period.

Then also major air carriers like B.CAL, KLM, Air France etc, served the country.

(2) Accommodation Sector

Hotel visitors are usually the main source of income for the tourism industry. The availability of hotel accommodation is therefore crucial for a country that wishes to develop its tourism resources and market them. Currently, however, most of the hotel amenities, facilities and infrastructure in the country have been heavily looted and vandalized. Of the total of 1409 hotel beds reported

as being available in early 1997, not more than 500 were of international standard. As a result of the armed conflict the situation worsened, with only 150 beds of acceptable standard available in the Freetown area in 1998/1999. The current situation has somewhat improved with a stock of new and refurbished hotel beds of international standard in the Aberdeen area of the Freetown peninsular.

The hotels in that area – the Bintumani, the Cape Sierra, Cape Guest, Kimbima, Sierra Lighthouse, and the Mammy Yoko; and Country Lodge at Hill Station; and the Cambena and Hilltop at Signal Hill have a total capacity of about 990 beds which represents the current, internationally acceptable stock of tourist accommodation in the country. There are several guesthouses nationwide which together with the hotels give a total bed space of about 1716. This figure should be compared with the 3,360 beds that are on offer in the Gambia, the principal competing destination in West Africa.

(3) Transport Sector

Sierra Leone's potential tourists will continue to come by air since this is the quickest way of reaching the country from overseas tourist generating countries. Only two carriers presently link Sierra Leone with Europe (SNA and SN Brussels) whilst several others connect with the rest of Africa.

Formerly internal flights served the provincial headquarter towns but with landing strips severely damaged by the rebel war there are no more regular provincial flights.

Heavy rains, flooded rivers and damaged roads make travelling by road to provincial tourist areas practically impossible; and river crossings dangerous during the rainy season. Local travelling by sea and river transportation within the country is very badly underdeveloped and the general road network in the country though extensive, has suffered from years of neglect, exacerbated by several years of armed conflict.

At the moment previous difficulties with passenger facilitation, luggage handling and other passenger services at the country's only international airport (Lungi International Airport) have been greatly improved but there is still room for improvement. The process is mostly slow and sometimes chaotic especially when several full flights arrive close to each other. Transfers to and from Freetown also can cause delay and inconvenience. There is need to look into this matter very seriously with a view to eradicating all the problems encountered and facilitate the smooth passage of visitors in and out of the country if we are going to encourage tourists to visit Sierra Leone.

In short, therefore, access to Sierra Leone both as a tourist destination and to potential sites within the country can be problematic.

(4) Human Resources Development In The Tourism Sector

It is a well-known fact in the travel trade that tour operators are unwilling to promote a holiday destination or send tourists to an area unless they are assured that the standards of services would meet with the guests'

expectations. It is also well known that the quality of these services is dependent on the skills and experience of the staff.

The Hotel and Tourism Training Centre, now renamed Hotel and Tourism Training Institute (HTTI) was established in 1990 for the training of basic and middle level manpower that would service the tourism and hospitality industry. Since then an appreciable number of personnel men and women mainly bar, housekeeping, and restaurant have been trained. The manpower needs assessment study of the tourism industry that was financed by the World Tourism Organization in 1994 recommended wide-scale training of personnel at all levels of the industry. However, with the industry experiencing a downward trend since 1991, lack of adequate financial support, poor management and inadequate capacity of the teaching staff, the output from the Institute has been far from satisfactory. To make matters worse, the Institute's premises were comprehensively looted and vandalized in February 1998.

The Hotel and Tourism Training Institute is therefore currently in no state to provide the much needed training for the effective servicing of the tourism industry in Sierra Leone. Its current situation is that training is provided from its Tower Hill office but not to acceptable visitor standards

(5) Socio-Economic contribution of the Tourism Sector to the National Economy

Tourism in Sierra Leone makes itself felt in three principal ways – through employment creation, through revenues accruing to the Government and through the generation of net foreign exchange earnings.

Recent statistical information available indicates that about 4000 persons were directly employed in the industry in 2003 and that Le 3.6bn (three billion six hundred thousand leones) was generated as revenue. However, no official compilation was available to us, of total revenue that has accrued to the government over the last few years. It has been difficult to assess and quantify the contribution made by the tourism sector to the economic and social development of the country.

The inevitable conclusion one would make therefore is that Sierra Leone's tourism industry as presently constituted and operated makes a small contribution to the national economy. There is however no doubt that there are ways and means by which the sector can make a more significant contribution to the economic well being of the country. These include:

- Encouraging increased profitability of the hotel industry, which would have direct and indirect positive impact on government revenue.
- Providing a range of tourist attractions, which would stimulate greater expenditure on local goods and services by overseas visitors.
- Minimizing, so far as it is practicable, the imported content of materials used in the construction of tourism facilities and the goods and services

used in their operation, thereby reducing the leakage of foreign exchange.

A strengthening of public and private sector institutions, combined with a strengthening of coordination mechanisms among them, should facilitate the process but specific procedures should be put in place as soon as possible .

(6) Promotion

The Government through the National Tourist Board should take leadership in recognizing the importance of promoting tourism to Sierra Leone and to introduce a more effective mechanism for the industry to maximize its full potential. The Ministry of Tourism should also be empowered to play its part and harmonize interventions in tourism across sectors.

Sierra Leone's Embassies and High Commissions should have designated Tourism Officers to market the country's tourism potential.

1.1.3. TOURISM IN SIERRA LEONE

Tourism in Sierra Leone is currently highly beach-oriented. While a variety of scenic and cultural attractions exist throughout the country, infra-structural problems and difficulties of access have so far impeded tourism development on any significant scale. Moreover, the majority of beaches are, themselves, little used for similar reasons except on public holidays. Lumley Beach alone, due to its proximity to the existing concentration of hotels, and easy transport access has many great tourist visitations.

The Industrial Market Research Limited funded by the Overseas Development Association undertook a preliminary assessment of the country's tourism assets in 1972/73. A management consultant sponsored by the Commission of European Communities carried out another study in 1982. Individuals and organizations have carried out many studies by on Tourism and Cultural Status in the country. The conclusions from these studies confirm that Sierra Leone is indeed endowed with huge natural Tourism attractions and a rich Cultural Heritage and that the potential exists for growth.

It is unfortunate however to note that the country's resources have not been fully developed and utilized to enable the country reap the benefits to the fullest.

This is due to the general low level of economic development especially over the past decade when the country was plunged into a brutal armed conflict. During this period, the country experienced the withdrawal of investment in the tourism and cultural sector. Also there has been a lack of Government's active participation in ensuring development of the industry and low budget allocation for the sector. The National Tourist Board is responsible for the marketing aspect of Tourism had the following Government budget allocations between 2000 – 2004.

2000	Le 30 million
2001	Le 30 million
2002	Le 40 million
2003	Le 44.1 million
2004	Le 55.5 million

Source: National Tourist Board / Sierra Leone Government Gazette

1.2 Tourism and Poverty

A wide range of actions is needed to increase benefits to the poor from tourism. These go well beyond simply promoting community tourism, although work at grass-roots level to develop enterprises and local capacity is one key component. Efforts are also needed on marketing, employment opportunities, linkages with the established private sector, policy and regulation, and participation in decision-making through working across all levels and stakeholders.

Tourism can on the one hand have a beneficial impact on the economic lives of local populations by creating jobs and providing additional sources of income and wealth creation. On the other hand, the quality of tourism assets is also affected by poverty. Deforestation, a continuing threat in Sierra Leone, reflects the desperate attempt at survival by very poor rural populations, with few economic alternatives to subsistence agriculture and the use of trees as fuel wood. Similarly, population pressures and over-fishing are among the main threats to the coastal zone.

There is lack of effective partnerships between the public and private sectors. Only a continuing dialogue between the public and private sectors can lead to a successful tourism management. It is hoped that some progress will be made and that dialogue though not yet in place will soon happen . Public and private sector institutions as well as coordinating mechanisms should be strengthened in order to facilitate the process . Ultimately specific procedures should be put in place as soon as possible.

1.2.1 What is pro poor tourism?

Pro-Poor Tourism (PPT) is tourism that results in increased net benefits for poor people. "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, and / or engagement in decision-making—for the poor."

Certain characteristics of tourism enhance its pro-poor potential. Tourism 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.

1.2.2 The strengths of PPT:

- Tourism can 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.
- Capacity to increase demand for goods and services provided by the poor and to increase 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
- The existing “sustainable tourism” movement can be harnessed to include poverty as well as environment in its agenda.

“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)

1.2.3 PPT Impacts

Pro poor tourism initiatives should Increase participation of the poor in the development of tourism by :

- Recognizing that while the percentage of poor people in urban areas is increasing, there are still more in rural areas both in total numbers as well as a proportion of the population. A key opportunity of involving more of the poor in tourism is to develop community tourism enterprises. One advantage specific to rural tourism is that the nature of the product often involves enterprises that feature local ownership such as bed and breakfasts, guesthouses, kiosks and snack bars, handicraft sellers (both males and females) etc.
- Bring wider benefits to rural areas
 - Increasing farm economic activity, Infra-structural development, and access to essential services, attracting younger able bodied

men and women as they gravitate to the area to find jobs; and gaining political clout. All these lead to:

- Economic growth, economic diversification and stabilization;
- Employment creation, as primary source of income but most importantly secondary source of income;
- Reduced out-migration and possibly re-population;
- Maintenance and improvement of public services;
- Infra-structural improvements;
- Revitalizing crafts, customs and cultural identities;
- Increasing opportunities for social contact and exchange;
- Protection and improvement of the environment;
- Increasing recognition of rural priorities and potential by policy-makers and economic planners.

1.2.4 Eco-tourism

Eco-tourism as a tool for conservation and development

Eco-tourism has become increasingly popular over the last decade, both with conservation and development organizations looking for means of generating an income from protected areas, and with tourists from richer countries looking for new experiences. Most significantly, eco-tourism is seen as an opportunity for local people living in tourism destinations to gain positive benefits from tourism development and the conservation of forests and protected areas.

The market for eco-tourism is very susceptible to outside factors. Political instability, changes in fashions in the tourist sending countries, and weather and natural disasters play a major role in the success or failure of tourism development.

In order for an eco-tourism programme to be a success, the benefits gained must have an impact in the host area. All too often, tourism revenue leaks away from the local economy back to the tourist-sending countries, and local communities end up seeing little benefit (Brandon 1993, Koch 1994). However, when carefully planned and managed, eco-tourism development can provide a sustainable return, much of which can remain in the local community (Horwich, 1988).

CHAPTER 2

2.1 Analysing Tourism Sector Performance and Constraints

2.1.1. SECTOR MANAGEMENT

Ministry of Tourism

The Ministry of Tourism and Culture is responsible for tourism policy, which currently has a three pronged focus: investment promotion; professional training at all levels; and promotion of Sierra Leone's tourism. The National Tourist Board is responsible for marketing tourism nationally and internationally.

Whether Sierra Leone 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. The activities of most if not all other government ministries impact directly or indirectly on tourism as well as the Ministry itself. Such ministries whose activities are related to tourism, apart from the Ministry of Tourism, are, for example, the Ministries of Finance, Lands, Trade & Industry, Transport & Communications, Agriculture, Labour, Energy & Power and Development & Economic Planning.

The Ministry sadly lacks vital resources for running the offices especially those set up in provincial headquarter towns .

To be successful, tourism requires coordination and cooperation between the Government and the private sector, civil society in general and, in particular, with local communities that are specifically impacted by tourism, where NGO's can facilitate the process. Only a continuing dialogue between the public and private sectors can lead to a successful tourism management. Initial enquiries are yet to be formalised .

Analysing Sector Performance

2.1.2 Performance

In spite of the country's huge potentials in culture and tourism, the sector has not been able to attract the level of investment that could positively impact on its development. A combination of factors has been responsible for this state of affairs. The Government for many years, failed to appreciate the fact that development of the sector required much more input from the private sector. All over the world, Tourism Development and Culture marketing is a private sector led affair and Governments are required to create the necessary conducive environment through provision of physical infrastructure, ensuring

security of lives and property and putting in place adequate legislation that encourage private sector participation.

Tourism activities have in the recent past been undiversified and remain confined mainly to the Freetown Peninsular. Currently the Tourism Sector is creeping towards some semblance of development, as it is gradually recovering from the dilapidated status caused by ten years of civil war.

The visitor season is concentrated in the November to April period. The dispersal of business – oriented demand over a large number of units, means that occupancy rates are at an average low year-round level. However the average is surpassed at Christmas and Easter when visitors (mainly nationals living abroad) come on holiday.

In economic terms, the contribution of tourism to Sierra Leone is difficult to quantify but it is estimated that some 4000 individuals are directly employed in the hotel / resort industry and that upwards of that number gain indirect employment through the sector. This includes hovercraft and helicopter staff; and fruit sellers, as well butchers, fishmongers, poultry and handicraft sellers (both male and female).

Of the number of people directly employed in hotels and resorts some 60% are women. Both males and females are employed as housekeeping staff and there is no disparity on pay.

Notwithstanding the tourism sector's employment generation role and the implicit effects of the income multiplier, it is estimated that the net benefits to the Government through the generation of tax revenues and foreign exchange are not as significant as would be expected in both financial and economic terms, possibly due to the fact that not all revenue due to the Government is collected. Therefore, the tourism sector as currently constituted, organized and marketed contributes not as much to the economic development of the nation as could be expected.

2.1.3. SITUATIONAL ANALYSIS

The tourism sector may well be operating considerably below its potential not because of the quality, variety and uniqueness of the tourism assets but because such assets remain largely under-utilized.

The main constraints to growth of the sector are highlighted below and they are on both the demand and supply sides. On the face of it, demand potential appears to be unlimited because of the quality, variety and uniqueness of the tourism assets, both through increasing the numbers of tourists visiting Sierra Leone and by increasing per capita tourist expenditures through higher value added services. However, meagre official and private sector promotion and lack of attention to the policies and infrastructure in place has left this demand largely untapped. Simultaneously, the current inability of the sector to accommodate and transport increased numbers, certainly of discerning tourists, constrains its growth.

The cost and vagaries of airline access and restrictions on internal travel because of poor road infrastructure and unreliable, unavailable and high cost commuter airlines, is a major limiting factor on the size of the sector.

(1) Tourism Plan

The last Tourism Plan was done in 1982 as a result of a World Bank funded study. No other official study has been done since although private sector individuals / groups have done some research for their own consumption. A comprehensive review of the Tourism Master Plan will have to be undertaken as well as preparing a Marketing Plan.

The Ministry of Tourism in 1999 prepared a document called Blueprint for Tourism Development with recommendations for taking the industry forward. Perhaps the fact that in the document recently published for the country called Sierra Leone Vision 2025 Sweet Salone , a review of the sector was done indicates that the Government is at last ready to take a serious look at and make attempts to improve the sector

(2) Accommodation Sector

There are a few good hotels in Freetown. The situation has somewhat improved since peace returned with a stock of new and refurbished hotel beds of international standard in the Aberdeen area of the Freetown peninsular.

The hotels in that area – the Bintumani, the Cape Sierra, Cape Guest, Kimbima, Sierra Lighthouse, and the Mammy Yoko and the Country Lodge at Hill Station with about 990 beds represent the current, internationally acceptable stock of tourist accommodation in the country. In addition to these hotels there are other guesthouses / resorts within Freetown and the peninsular, and a large number of lower quality establishments nationwide giving total bed space of about 1716. This should be compared with about 3,360 beds that are on offer in the Gambia, the principal competing destination in West Africa.

As provincial guest houses / motels do not meet international grading standards , they will have to be greatly improved if tourists are to be attracted to the respective areas.

Group travel is a characteristic of international tourism today and most guesthouses outside Freetown cannot accommodate even the small groups of say 16 people who might want to travel to Sierra Leone.

(3) Transport Sector

Efficient international air transport is vital to tourism development in Sierra Leone since this is the quickest way of reaching the country from overseas tourist generating countries. Currently, however, there are only two carriers in Sierra Leone that link with Europe (Sierra National Airlines and SN Brussels) The Government should actively lobby and encourage other carriers, especially those that serviced Sierra Leone before the war, to return. Several other carriers connect to the West Coast and other parts of Africa. There are no direct links to the USA as the market is not sufficient and airfares are

among the highest in the world because of lack of competition. International access is convenient for all tourists resident in Europe and Africa.

Internal flights are costly, irregular, perceived as risky and serve only provincial headquarter towns. Landing strips destroyed during the war will have to be rehabilitated.

From May to September the wet season brings heavy rains, flooded rivers and damaged roads that can make overland travel very difficult. Rough seas can delay or make dangerous inter-land travel.

Road infrastructure is inadequate on even the most travelled internal routes and is absent for many less visited sites with high tourist potential.

(4) Government Policies & Regulatory framework

Investors look for a stable macro-economic framework within which to operate; one which secures their investment and ensures returns.

The present Tourism Act needs to be reviewed and strengthened. The absence of a national investment code makes investors hesitant to make any significant financial input.

In the provision and supply of goods to hotels there is no organization regarding the quality, price, distribution centre, or availability. There are no organised beach market centres for tourist souvenirs; beach and swimming accessories are lacking.

Procedures and processes for land acquisition are tortuous and uncertain. Land ownership in the provinces is impossible if you are not a native of the area. All land is vested in the Chief.

In Freetown, only nationals can own land though there is nothing stopping foreigners from taking long leases.

(5) Marketing

Although the National Tourist Board is responsible for marketing tourism locally and internationally there is a lack of sufficient financial resources to undertake the exercise.

Sierra Leone is without a flagship eco-tourism or resort hotel that would expand worldwide promotion and help attract tourists and other investors.

Lack of effective marketing of Sierra Leone by either the public or private sectors restricts its access to supplier markets and is exacerbated by the absence of brand name hotels. An aggressive marketing plan is therefore needed.

(6) Health & Safety

The apparent lack of health & safety policies plus inadequate facilities especially in emergency treatment for accidents, and malaria is of concern to visitors. Personal safety is not regarded as a serious problem in most of Sierra Leone.

7) Training

The HTTI should be upgraded to providing top rate training for male and female hotel and restaurant staff including managers ; and for related trades e.g. craft making, tour guides etc .

2.1.4. Positive Signals

The Government through the draft PRSP now being prepared is turning its attention to potential linkages between tourism and poverty alleviation. Most importantly, macro-economic policies are being enacted to create sustained economic growth and to provide an improved business environment. The use of donor funding for improving the road network (such as the Waterloo / Peninsular Road) will also benefit tourism provided the needs of the sector rank among the priorities. Communications have improved greatly with the widespread use of mobile phones and e-mail but coverage is restricted to Freetown and provincial headquarter towns. Telecommunication in tourist areas will have to be provided probably by encouraging overseas telecommunications providers .

2.2 .LINKAGES - GENDER, ENVIRONMENT, YOUTH & HIV ISSUES

Gender mainstreaming is central to managing the development process while youth development is a concern. Many developing countries now regard tourism as an important and integral part of their economic development strategies. Tourism is perceived as a panacea for fragile economies that are characterized by a scarcity of development resources such as finance and expertise. These resources are needed to increase the economic surplus, without which developing countries like Sierra Leone would be forced to rely solely on international aid to support development efforts. Therefore the well-recognised benefits of tourism are the usual reasons advanced for governments' support for tourism.

Tourism is multi-faceted and its economic dimension cannot occur without inputs of a social, cultural and environmental nature.

As demand for tourism increases, so too will it bring with it not only opportunities for linkages with other sectors in the economy, but also consequences of a social, cultural, and environmental nature. These consequences, affect both the public and private sectors. In the areas where tourism impacts on the country and society, there may well be conflicts with competing demands for other sectors of the economy, or with community interests at large.

The negative social aspects of tourism can include an increase in prostitution and (at its worst) of child prostitution. The society has become aware that child prostitution has occurred in Sierra Leone especially since the war years. NGO's in collaboration with the Government is conducting a vigorous campaign against prostitution.

It is however, necessary to remember that tourism is more than an economic activity. It is, in essence, a massive interaction of people, demanding a wide range of services, facilities, and inputs that generate opportunities and challenges nationwide. For this reason, it is necessary to manage the growth of the sector and have guidelines which ensure that such growth is compatible with national and sectoral objectives. Policy provides the guidelines and the reference point against which any development in the sector should be evaluated.

2.2.1. GENDER

Local women produce handicrafts for sale; vegetables grown by them are consumed domestically and as well sold to hotels and restaurants. Tourism therefore can be a means for women to provide / supplement income for their families.

Gender issues are highly relevant to protecting the environment, achieving sustainable development or enabling universal access to health care. In the developing world women do not have equal rights to men in legal, social, and economic rights. Even in the developed world women are

constantly fighting for equal rights with men despite legislation being in place to safeguard such equal rights

2.2.2. Environment

Although tourism has the potential to provide valuable economic benefits to peripheral residents and regional entities, it can also have negative cultural and environmental impacts if not controlled. Tourism will be slow to take off until the infrastructure has been upgraded and the tarnished reputation of the country as a dangerous place (caused by the war), has been buried. But as news of the delights that the country has to offer begins to circulate in the developed world, the tourist industry will start to take off.

Tourism, carefully managed, is a tool for environmental protection and for financing conservation. Many “willingness to pay” studies indicate that tourists can be tapped to support environmental or cultural protection either through entrance fees (US\$300 in Kenya for a game reserve), departure or other taxes, and voluntary contributions. 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 has met clear environmental standards.

Many direct and indirect tools are available but it is important that tourism officials, as well as government policy makers and environmental officials realize the importance of this issue.

The devastating effects of soil degradation have been proved by several landslides (previously very rare) particularly during the rainy season. Poverty continues to threaten the sustainability of the natural soil. Reversing the downward spiral of environmental degradation would thus mostly benefit the poor, while maintaining exceptional biodiversity.

The Government should ensure the environmental monitoring of the use of the country’s natural assets.

A major reason for seeking environmental credentials for tourist accommodation and services is that many lodges and hotels worldwide are already doing so. If accommodation and service managers are not using environmentally benign practices, tourists could be discouraged. “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 Europeans.

The environment is the repository of all natural resources, which are exploited for national development and human livelihood. Sierra Leoneans have always depended on their natural resource endowment for survival and some for development. Thus, the major concern in terms of environmental sustainability in Sierra Leone revolves around the need to balance the challenges of national development and the advantages of sustainable exploitation of the available natural resources ; and the maintenance of environmental quality to meet the needs of both the present and future generations.

Deforestation accounts to a large extent for the environmental degradation in the country. The traditional farming practice of shifting cultivation, with declining fallow periods, have over the years left vast expanses of land deforested in much of the country. While forests continue to be the principal source of fuel wood and construction materials; mangroves along the coastal areas are being increasingly exploited for fuel wood and coal, boat construction, and rice cultivation. This has led to increased exposure to storms and destruction of natural breeding grounds for marine life.

Mining activities, particularly in the eastern and southern regions, have also left vast areas deforested and degraded. It is estimated that between 80,000 and 120,000 hectares have been mined in different parts of the country with minimal efforts at reclamation. The uncontrolled exploitation of mineral resources, coupled with the absence of mitigating policies and conservation programmes over the years, has resulted in devastating environmental consequences.

Achieving environmental quality and accreditation

Two critical elements to be considered are: -

- The need for a well-planned and beautiful country to promote a healthy living condition for the population and attract tourists and potential foreign investors.
- The imperative of sustained exploitation and utilization of available natural resources to satisfy the needs of present and future generations.

The tourism sector needs to become better informed about the procedures for obtaining accreditation for improved environmental management. Essentially, the hotels and service entities should adopt an environmental management system (EMS) that meets international standards, such as those established by ISO 14001 for all economic activities and by Green Globe specifically for the tourism sector.

Ideally an association representing the hotel sector should take the lead in this process, but should be assisted by a donor agency to fund the services of an expert in “greening” of hotels and services, and to train the hotel and service operators in improved management.

The EMS improves management generally not just environmentally; it normally leads to improved profits and also has an impact on sanitary and waste management practices in the households and communities of hotel employees.

Environmental education programme, aimed at local children in particular and the Community in general should be designed to reinforce the positive message about maintaining the forest.

2.2.3. YOUTH / HIV ISSUES

From the social perspective, the challenges are to address human development and pervasive poverty. Threats posed by HIV/AIDS must be faced.

1) Unemployment.

Key characteristics of the population are the high levels of unemployment and underemployment. According to the 1988/89 labour force surveys, the overall unemployment rate was about 24%; it was highest in the 20-39 age group. It is obvious that the civil conflict has heightened unemployment, which is visible both in big towns and rural areas. A large number of the unemployed are early school leavers (boys and girls). Graduate unemployment among males and females is an emerging problem, which could be a result of the non-expansion in the modern sector, and the low relevance of university education to most of the Sierra Leonean job market.

With deepening poverty facing the majority of the population, particularly the highly vulnerable groups of young men and women, Government is currently intensifying its efforts at poverty reduction.

2) Education and Training

Industry suffers because it is hard to find male and female workers with basic numeracy and literacy skills. Far from getting better with time, this problem is becoming worse. Basic education achievement appears to be declining throughout the country, especially in the sciences and technical fields.

An important void in the education system is the lack of training in languages. Few people in Sierra Leone communicate well in any international language other than English. It is estimated that about 4000 young persons were abducted by rebels and held hostage at a time when they should have been at school. The development loss of all of these is particularly reflected in the damage to the productive population whose participation in the development process has been greatly hindered.

After all, Sierra Leone once educated some of the best brains and leaders in West Africa. It could regain this glory with substantial investment in quality education and training. The tradition of excellence in education can be brought back, to train the young males and females for jobs in various fields.

3) Health

The health sector like other sectors has suffered neglect. Life expectancy is now 39 years. The legacies of ten years of rebel war dominate Sierra Leone's prospects for a new beginning. Violence, characterized by the rebels' terror tactics whilst occupying over half of the country including the rape of women and girls, led to marked increases in the incidence of sexually transmitted diseases, HIV/AIDS, and physical and psychological trauma.

46% of women in child-bearing age are said to be unaware of HIV/AIDS; very few know where they can be tested for the disease, indicating the potential for it to spread.

Thus the country is faced with the threats posed by the HIV/AIDS pandemic particularly among the productive population. The social and economic impacts of the disease in terms of its human toll are a cause for concern.

Women and young girls face additional health problems apart from those associated with the reproductive role. Women (including the girl child) who find themselves in a position where they now have to provide for families and siblings, in the absence of employment resort to commercial sex work. Without sufficient education on practicing safe sex these women and girls go from one partner to another having unprotected sex and end up contracting STD's and HIV/AIDS.

In these conditions of poverty and deprivation, and constant movement of people, including refugees, armed forces, and gangsters, the spread of HIV/AIDS runs rampant. All efforts on education or prevention programmes by the government and aid organizations do not seem to have as great and significant an impact as hoped for. The World Bank funded programme SHARP/HIV AIDS was launched in 2002/3 to educate local and regional communities on safe sex and HIV related issues; the resulting effect is that gradually the message is getting through.

CHAPTER 3

3.1 Identifying Growth Potential

It is clear that Africa cannot achieve sustainable growth and poverty reduction without a transformed partnership with the international community. It is through increased international trade that Africa will develop. Export is one of the necessary engines for growth and to achieve this, African products need much improved international access. It is now beyond dispute that the only source that can provide long-term finance required for economic growth and poverty reduction is the private sector both national and international. A vibrant and competitive private sector can play a key role in lifting people out of poverty; it can deliver well-managed services and provide robust capital markets. Sierra Leone like other African countries needs to become competitive and requires effective and sustainable macro-economic policies that can overcome the structural weaknesses of its economy, build upon its comparative advantages and prioritise the reduction of poverty.

- It needs a healthy and well-educated population, structurally diversified economy with low transaction costs; important for a market economy to function effectively.
- Poorly functioning and high cost utilities (electricity, telecommunications, water) and bad infrastructure act as a tax on entrepreneurial activity thus dampening economic growth.
- Procedures for obtaining licenses and other documents are slow and bureaucratic.
- Investors will gravitate towards countries with low transaction costs; thus creating an enabling environment for investment in the tourism sector is a necessity. This includes institutional, legal infrastructure and financial measures.
- Peace and stability are also essential for a country's tourism industry to develop. Such growth must be associated with progressive distributional changes to have an impact on reducing poverty.
- Good governance is being increasingly recognised as a prerequisite for economic growth and creating a link with the investment climate. Tourism can be a source of such growth. It affects the livelihood of many poor people making significant contribution to the GDP of the country.

3.1.1 Pro-poor Potential of Tourism

Some argue that because tourism is often driven by foreign, private sector interests, it does not contribute much to poverty elimination. Indeed, it can disadvantage the poor causing displacement, increased local costs, loss of access to resources and social and cultural disruption.

A countervailing view is that tourism has better prospects for promoting pro-poor growth than many other sectors and that many of the supposed disadvantages of tourism are, in fact, common to most types of economic development in a globalised world.

Tourism's pro-poor potential derives from the fact that: -

- It is a diverse industry. This increases the scope for wide participation of the informal sector.
- The customer comes to the product, providing considerable opportunities for linkages (e.g. souvenir selling, handicrafts).
- Tourism is highly dependent upon nature (e.g. wildlife, scenery) and culture. These are assets that some of the poor have, even if they have no financial resources.
- Tourism can be more labour intensive than manufacturing (though less labour intensive than agriculture).
- Compared to other modern sectors, a higher proportion of tourism benefits (job, petty trade opportunities) go to women (though it is not known whether these are necessarily the poorest women).

Pro-poor tourism strategies are needed to take advantage of the potential benefits, and to minimise the negative effects.

Rural tourism as a motor of growth

Strategies to use tourism as a motor of growth in rural areas emerge in different contexts. Such strategies are about enabling rural producers to reduce reliance on agriculture, and engage in new economic opportunities that are competitive in the more globalised markets, which now reach their doorstep (or farm gate). In Africa, the emphasis is more on diversification of under-developed areas. Sierra Leone should consider adopting this strategy

3.1.2. Assets (Natural, Arts and Culture)

Sierra Leone's extraordinary natural assets (including mountains, wildlife, minerals and beaches), land and sea based, make it a target destination for tourists if properly managed and marketed.

Sierra Leone's rich culture, which has in the past earned foreign exchange, (the National Dance Troupe toured UK and USA in the 1960's, 70's and 80's) continues to be a growth potential. Culture is not merely useful for its esoteric or entertainment value. It is an essential ingredient of economic and social development.

The Arts are repositories of culture practices while at the same time being effective educational tools. It is therefore the responsibility of Government to provide an enabling environment for the development of all the arts and encourage the people to participate in and patronize them.

Regional cultural centres should be established in each region with a National Cultural Village and performing Arts centre possibly in Freetown. The National Museum should be strengthened and private sector participation encouraged in setting up private museums and arts galleries (such as Balmaya Arts gallery) to display works of Sierra Leonean Artists as well as encouraging groups in the performing arts whether in schools, colleges or outside.

Employment

Job creation for local people especially in tourism areas impacts beneficially on their lives. This can be either direct or indirect (e.g. obtaining fresh fruits and vegetables, fish, agriculture, industry and manufacturing, travel and tour operators, creation of handicrafts) income generation for Government. It is estimated that about 4000 men and women were directly and indirectly employed in the industry during 2003.

The industry is estimated to have earned Le 3.6bn in 2003

Travel (Air & Land)

(1) International

A comparable reduction in airfares could see total packages reduced and at least a corresponding increase in the number of visitors. At about £700 for an excursion ticket to Freetown, it is about double the package price to the Gambia. (where prices of around £350-400 include flight, bed and breakfast). At the same time, scheduled airlines and tour operators should be encouraged to offer good rates to travellers.

Sierra Leone is strategically placed. Before the war, all the major airlines were represented here some flying two / three times a week between Freetown / Europe and to other parts of Africa. A return to those days will signify growth.

(2) Internal

Land, air and sea travel within Sierra Leone needs to be developed. The roads infrastructure is not good and provincial air landing strips were destroyed during the war. These will have to be rehabilitated to have any impact on growth.

Business Environment

An improved business environment coupled with sustained economic growth and a National Tourism policy will make for growth in the industry. New investment should utilize existing infrastructure already where appropriate. In areas where such are non-existent then the design of new projects from ground up should be encouraged. The regulatory framework (Tourism Act) should be reviewed and strengthened and the investment code should be finalised and made public.

Tourism generates substantial economic activity in other production and service sectors. The construction sector is obviously impacted during

construction of hotel and tourism related facilities. Backward and forward linkages to agriculture, fishing and manufacturing are generated. Tourist services and tourists themselves, through personal spending in and outside the tourist accommodation, create a demand for transport, banking, insurance, telecommunications, medical, security , retail services, and, particularly, handicrafts and other souvenirs. Tourism leads to the creation of businesses related to water, mountain and adventure sports and other recreation activities, as well as every facet of travel and transport (land, sea and air).

The potential for growth, if current constraints are addressed, is almost unlimited. Sierra Leone has sufficient and varied assets that can be brought on stream successively over time to cater to different segments of the tourism market and to help create development poles in different regions of the country.

3.2 IDENTIFYING STRATEGIES AND PRIORITY PROGRAMMES FOR POVERTY REDUCTION .

3.2.1. Identifying Strategies

The resort market is the most competitive segment of demand worldwide. A challenge for Sierra Leone is to build and promote its position as an eco-tourism and adventure destination and simultaneously build up its image for other segments. It should also explore options for creating regional tours with other neighbouring countries on the West Coast such as Gambia, Senegal, and Ghana.

Expansion in selected areas, through creation of clusters of accommodation, services and infrastructure that set standards of excellence, combined with improved transport access, and the initiation of an effective promotion campaign, will raise the rate of growth of tourist arrivals. Furthermore, by raising standards, the levels of tourist expenditure should increase. Because of the spread of tourism throughout the country and the targeting of local communities as beneficiaries and participants in the process of tourism expansion, a stimulus will be given to regional development and to poverty alleviation in these areas. A central emphasis in the planning on environmental conservation should include adoption of a revenue policy that ensures the preservation of the natural resource base. Achievement of these objectives will also require effective management by the public sector and an effective partnership with the private sector (local and international), donors and NGOs.

Poverty missions should review the potential of tourism to generate income in specific rural areas and environmental missions should review the potential of tourism for raising revenues to conserve natural resources used for tourism.

Tourism cannot bridge the gap between its current low level and its potential without a plan for the sector. Some World Bank projects if implemented in Sierra Leone can help to remove some of the constraints on the sector and increase outreach of tourism to rural areas, where it can help to alleviate poverty. Since tourism is cross-sectoral, almost any donor-assisted activity would have a significant impact on tourism, as, for example, all infrastructure projects, including water, power, telecommunications, as well as health and education.

The national transport plan could help to improve those roads, secondary airports and possibly ports and river navigation that would directly benefit the growth and/or expansion of tourism. The rural roads project could be instrumental in opening up remote areas with tourism potential.

A study on the linkages between agriculture and tourism would help establish demand from the accommodation sector. Public expenditure reviews should examine Government expenditures for the tourism sector, including promotion and training, which should be financed through a partnership with the private sector.

Ideally, a donor consultation process should be established for the tourism sector which uses tourism-related projects to raise revenues and, through community funding, help conserve the asset. But, to enable the Government to improve its policies towards the sector and to enable meaningful dialogues with all the different stakeholders, it is first necessary to have a blueprint for development of the sector in the short and long term.

Such a blueprint would enable the Government to improve its policies towards the sector and to begin a meaningful dialogue with all the different stakeholders.

It would identify priority tourism areas and types of tourism that should be encouraged and should develop a comprehensive and sustainable strategy for the sector, in close consultation with all the stakeholders.

Many countries use the tool of a Master Plan to establish a roadmap for tourism development over periods as long as twenty years.

3.2.2. Strategies for pro poor tourism can be divided into the type of benefit that is generated: i.e. economic benefits, other livelihood benefits (such as physical, social or cultural improvements), and less tangible benefits of participation and involvement.

1) Economic benefits include:-Expansion of employment and local wages: via commitments to local jobs, training of locals for employment .Expansion of business opportunities for the poor such as businesses/entrepreneurs that sell inputs such as food, fuel, or building materials to tourism operations; or those that offer products directly to tourists, such as guiding, crafts, snack bars etc. Development of collective community income may be from equity dividends, lease fee, revenue share, or donations, usually established in partnership with tour operators and/or government institutions.

2) Strategies to enhance other (non-cash) livelihood benefits generally focus on:-Capacity building, training and empowerment; mitigation of the environmental impact of tourism on the poor and management of competing demands for access to natural resources between tourism and local people; address competing use of natural resources ; improved social and cultural impacts of tourism ; improved access to services and infrastructure: health care, communication (radio access), security, water supplies, transport.

3)Strategies focused on policy, process, and participation can create:- More supportive policy and planning framework that enables participation by the poor ; increased participation by the poor in decision-making by ensuring that local people are consulted by government and the private sector ; encouraging partnerships with the private sector ; increased flow of information , communication, meetings and report backs.

Implementing these strategies may involve lobbying for policy reform, involving the poor in local planning initiatives, amplifying their voice through producer associations, and developing formal and informal links between the poor and private operators.

A wide range of actions is needed to increase benefits to the poor from tourism. These involve working across all levels and stakeholders.

Private Sector roles

The private sector is an essential player in pro-poor tourism- as partner, customer, marketing channel and/or adviser. It can be involved directly in joint product development or indirectly, in maximising use of local suppliers and staff; provide technical advice to local enterprises, etc

Government roles

There is much that only government's can do- in terms of policies, regulations and coordination- so a leadership role for Government in pro-poor tourism is a great advantage.

There needs to be a policy environment that facilitates pro-poor tourism. Some of the actions governments can take within the tourism sector and across other sectors include- consulting with poor residents when making decisions about tourism; to encourage private investors to make and implement pro-poor commitments; ensure good policy is followed up with implementation; coordinate stakeholders around pro-poor tourism objectives.

Roles of the poor

The poor have many roles: as producers, suppliers and workers; also as participants and decision-makers. While this is often on an individual basis, there is also a key role for engagement as a community – in managing common assets or benefits and liaising with outsiders. Actions by the poor and their partners that may enhance the ability of the poor to engage effectively include measures that: Increase understanding of the tourism industry; develop skills for small business and tourism employment; establish transparent and equitable measures for managing collective benefits.

Civil society

There are limits to the capacity of government, private operators and the poor. It is invaluable to have a fourth party to fill the gaps, such as: -acting as a catalyst and liase between stakeholders; Investing in training and technical assistance to the poor; explore options for linkages between private operators and poor suppliers; facilitate the process to reduce time and risk for them; develop processes that amplify the voice of the poor at policy level.

Stakeholder roles and donors

These are often, though not always, a role for a non-governmental organization. Donors can encourage the other stakeholders to develop their roles in PPT specifically: - when requiring assessment of PPT issues; in ensuring tourism consultants are aware of PPT issues and address them, given their considerable influence in tourism national plans.

3.2.3 ECO-TOURISM

Steps to developing a project

1. Meet and discuss with local people whether the development of eco-tourism would be appropriate, and if so, how they would like to be involved in its development and management.
2. Consultation should be carried out through a series of participatory village / community meetings and interviews with key individuals.
3. If enthusiasm is shown, other potential stakeholders should be contacted (including tour operators, local business people, government and non-government organizations involved and tourism related fields).

Objectives of an Eco-tourism Project should include

To encourage conservation of the Forest Reserve at both local and national levels

Focus must be on achieving:

- a) signs of sustainability within a period of (say) five years both economic and in terms of the conservation of the forest ; and having local people managing the tourism sites with the Forest Department in an advisory role only.
The success will be decided by monitoring on the part of the guides and independent researchers for environmental impact, and by keeping records of visitor numbers ; encouraging comments and regular community consultations to evaluate the success of the tourism sites.
- b) Economic viability (i.e. costs of running the project, wages, maintenance etc) should be able to be met by the income generated through tourism.
- c) Active involvement of the local people in the development and management of the project.

CHAPTER 4

IDENTIFYING PROGRAMMES AND PROJECTS FOR IMPLEMENTATION

4.1.1. PROGRAMMES AND PROJECTS FOR IMPLEMENTATION

The implementation of any plan requires adequate resources be they finance or otherwise. Primary among the needs of the National Tourist Board is funds to relocate the Board's office and operations for it to effectively undertake its role and functions. Furthermore, to be able to pursue a successful marketing strategy it requires huge financial resources to undertake the production and printing of collateral material, overseas visits and bringing in reputable stakeholders in the industry. Currently the Board's revenue base is very weak and could be strengthened if the economic environment is attractive and there is stability in the country.

It must be emphasized that the private sector should remain the principal supplier of tourism services and facilities while public investment will be generally confined to providing the necessary economic infrastructure e.g. adequate reception facilities for arrivals at the airport, adequate and reliable ferry services and the means of transfer from the airport, regular supply of electricity, clean water, good roads, telecommunications and good health and sanitation system. It should also be recognized that a co-ordinated intersectoral effort must be made if maximum benefit is to be gained from what could become one of Sierra Leone's greatest economic development possibilities.

4.1.2. PROJECTS

The following projects have thus been identified as possible for implementation (to be prioritised) in the:

A) Short Term

- The rehabilitation of the Hotel and Tourism Training Institute including proper facilities for lecturers and students
- Establish hotel ratings according to international standards
- Review of the 1982 Tourism Master Plan
- Remarking Heritage Trails, rehabilitating tourist attractions, monuments and historical buildings such as Chimpanzee Rehabilitation Project, the Guma Dam, National Museum, and National Dance Troupe.

- Aggressive marketing and promotion involving tour operators and airlines; image and confidence building campaign in tourist generating countries;
- Review and strengthen the 1990 Tourism Act and establishing guidelines for marketing and policy for marketers;
- Establishing a permanent office for the Ministry of Tourism and Culture that could accommodate the Tourist Board ;
- Prepare a comprehensive Marketing Plan .

B) Medium Term: -

- Rehabilitation and Restoration of Bunce Island;
- The development of Lumley Beach Area;
- The Slave-route Project; Heritage Trails;
- The Management and Protection of Wildlife in the Outamba-Kilimi National Park;
- Feeder Roads – Upgraded and made easily accessible;
- Continued Rehabilitation of existing tourist / cultural areas ;
- Establish and assess status of designated regional tourism attractions and begin updating e.g. Tourism areas, wildlife parks ;
- Develop golf courses at hotel sites and update Freetown course at Lumley.

C) Long Term

- Major roads – build and reinforce broken major roads particularly to the Provinces ;
- Extensive and sustained marketing;
- Develop and update designated regional tourism attractions;
- Ensure long term employment (including self employed fruiters, guides etc.) with sustained and continuously improving tourist attractions.

4.1.3. COSTS

Short Term 0-2 YEARS

PROJECT NO. 1

- To review and update the Tourism Master Plan developed in 1982.
- To review and strengthen 1990 Tourism Act (incorporating protection of the country's tourism assets including areas of scenic value, wildlife areas, historical sites, design heritage trails); and finalise and implement the national investment code.
- The country's assets need to be properly identified by conducting a survey on: -
 - Physical and wildlife assets
 - Monuments, relics, historical buildings
 - Cultural assets
- To prepare an overall marketing plan, strategies for promotion such as trade fairs, brochures, and promotional materials and actively seek business partners.
- Rehabilitate existing tourist/cultural areas such as: -
 - The National Museum ; and establish regional museums;
 - The Chimpanzee Sanctuary at Regent
 - The Guma Dam at Mile 13
 - Nature Heritage Trail at No. 2 River
 - Leicester Peak etc.
- Assessing target markets and designated tourist development areas / attractions.
- Identifying market diversification vis a vis: -
 - Tourist type
 - Seasonality
 - Tour operators

**Estimated costs for project no 1 US \$ 100000
(one hundred thousand united states dollars)**

PROJECT NO 2

- To strengthen the HTTI and other such institutions to internationally accepted standards for both male and female sector workers at all levels (bar and restaurant staff, housekeepers, managers ,tour guides, marketing officials, fruit and vegetables sellers, craft makers/sellers)
- Establish standards for hoteliers and marketers (fruit and vegetables, fresh fish) ; educate grocers on quality standards; and recommend the establishment of standard prices (based on e.g. weight) for their produce;
- Gain international rating for hotels and resorts.
- To train existing ministry and tourist board staff ; recruit professionally trained staff ; and provide for succession planning.
- Identifying strategies to retain earnings and minimize leakages.
- Establish ASSET (Association of Small Scale Enterprises in Tourism) as in the Gambia to bring together, advocator for, and promote small-scale tourism enterprises.

**Estimated costs for project no 2 US \$ 150000
(one hundred and fifty thousand united states dollars)**

PROJECT NO. 3

- To have a permanent (preferably owned) office accommodation for the ministry and tourist board with provision for properly equipped provincial offices.
- To strengthen the environmental board in preparation for EIA and establish H&S standards for all; establish guidelines for operators of tourist activities including water sports and expeditions.
- To encourage major airlines (especially those from tourist generating countries) to include Freetown on their route

**Estimated costs for project no 3 US \$ 200000
(two hundred thousand united states dollars)**

Medium Term 3-5 YEARS

- Feeder Roads to be upgraded and made easily accessible (lobby the SLRA to allocate funds from Road user tax fund)
- Create employment opportunities for trained staff, marketers and craftsmen/women.
- Update marketing plan and assess actions to date.
- Assess status of designated regional tourism attractions e.g. tourism areas, wildlife parks, golf courses etc.

Long Term over 5 YEARS

- Major roads to be built and rehabilitate broken major roads particularly to the provinces.
- Extensive and sustained marketing
- Develop and update designated regional tourism attractions.
- Ensure long-term employment (including self-employed fruiters, guides etc.) with sustained and continuously improving tourist attractions / sector.
- Review and update as necessary Tourism Act, Policy and Plan

4.2 M & E Indicators

Impact evaluation assesses the changes in the well-being of individuals that can be attributed to a particular project, program or policy.

Measurement of levels of well-being associated is accomplished by using comparison or control groups (those who are as similar to the target group as possible, but for the fact that they do not participate in a program or receive the intervention). An estimate of impact can then be derived by comparing the levels of well-being between comparison or control groups and the treatment group (those who do receive the intervention).

If outcomes are to be the focus of any intervention then only methods that measure outcomes can be used in assessing the impact of tourism on pro-poor communities and individuals.

4.2.1 Estimation Methods

Estimation methods can be broadly classified into four categories. Different evaluation designs exist to determine methods used in measuring the impact of a program.

- Medium and long-term goals should be established and reviewed at regular intervals (e.g. every 2 – 3 years) in order to determine outcomes;

- Targets and indicators should be adequate taking into account the assessment of poverty and capacity to monitor;
- The national monitoring and evaluation system should be used as a guide

Methods

1) Estimation methods with experimental design

is a method of estimating impact using experimental design that involves comparing means of treatment and control groups. A random allocation of the intervention among eligible beneficiaries creates comparable treatment and control groups. The program impact on the outcome being evaluated can be measured by the difference between the means of the samples of the treatment group and the control group.

2) Estimation methods with non-experimental design

is used to control for possible observable characteristics that distinguish participants and non-participants. The difference in the mean outcomes of the two groups (participants and non-participants) conditional on the set of variables that cause outcome and participation, constitutes the program or treatment effect.

The variables are first used to predict program participation; then assess how the outcome indicator varies with the predicted values.

3) Estimation methods used with both experimental and non-experimental design

method is used to compare a treatment and a comparison group (first difference) before and after the intervention (second difference).

4.2.2 Selected Indicators of Tourism including Environmental sustainability in Sierra Leone

- Proportion of population depending on fuel wood as main energy source: 95%
- Total areas of forest and water resources(1990): 19,000 Sq Km
- Current deforestation area 87% of total forest area.
- Annual fresh water withdrawal (1970 – 1994): 0.4 Cu Km or 20% of total water resources.
- Project must show signs of sustainability within a predetermined period -this means both economic sustainability and sustainability in terms of the conservation of the forest and having local people managing the tourism sites with the Forest Department in an advisory role only. The success of the latter two will be decided by monitoring on the part of the guides and independent researchers for environmental impact, and by keeping records of visitor numbers and comments and regular community consultations to evaluate the success of the tourism sites.

- The active involvement of the local people in development and management
- increase in passenger numbers attributable to tourism from immigration cards
- Project must be economically viable for both males and females (i.e. costs of running the project , wages, maintenance etc should be able to be met by the income generated through tourism).
- Impact of training in terms of well-being etc on selected group compared to those not trained
- Increased awareness of improved standards amongst males and females (e.g. in hotels, restaurants etc.)

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Tourism Study Final Report (June 1982) financed by World Bank

Poverty Net Website – Overview of poverty reduction strategies PPT strategies for pro-poor tourism

Sierra Leone Vision 2025 “Sweet Salone” Report

Local communities and eco-tourism Report

DFID publications

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National Tourist Board list of hotels in Sierra Leone and other statistics

Tourism sector study African Region working paper

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2. Tourist sites in Sierra Leone.

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P. Dieke – Tourism in Africa

Local Fishermen - Goderich

Fish sellers - Lumley Beach and Krootown Road

Fruit and Vegetables Sellers – Krootown Road

Coal Sellers Association

Local communities – Lakka, Mile 13, No 2 River

Aureol Travel Agencies Limited – Travel Agents

S N Brussels - Airline

Kimbima Hotel – The Manager

Sierra Lighthouse Hotel – The Proprietor

Country Lodge Hotel – The Restaurant Manager

Manu's Guest House – the Proprietor

Craft Sellers Lakka and Hamilton Beaches

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TOURIST SITES IN SIERRA LEONE

TOURIST SITES

1. Loma Mountain, the highest in West Africa where there is the Bintumani Mountain (1945 meters high) in the Koinadugu District.
2. Sula Mountains; these include Lake Sonfon and the Bumbuna Water Falls
3. The Peninsula Forest / Heritage trails in Western Area (Freetown Peninsular)
4. Gola Forest which is suitable for wildlife and bird watching
5. Beaches in Sulima, Turner's Peninsular, Sherbro Peninsular near Shenge, the Freetown Peninsular and Banana and Plantain Islands
6. Bathurst /Charlotte Water falls in the Freetown Mountain villages
7. Guma Dam Trail – in the Freetown Peninsular
8. Leicester Peak

HISTORICAL AND CULTURAL SITES

1. The De Ruyter Stone close to King Jimmy Market
2. The Bastion of Fort Thornton, now incorporated into State House
3. The Gateway to the Kingyard now the gateway to Connaught Hospital by Wallace Johnson Street
4. The original Fourah Bay College Building at Cline Town
5. St. John's Maroon Church, Siaka Stevens Street, erected in 1620
6. Heddle's Farm, former country residence of the Governor
7. Bunce Island, slave trading Factory Island.
8. Banana Island, former British Naval Base
9. St. Charles Church, Regent, the 1st Stone Church built in 1818 in West Africa
10. Cultural Village, Aberdeen

11. National Museum – Cotton Tree Freetown

WILDLIFE TOURIST SITES

1. Outamba Kilimi National Park
2. Lake Sonfon
3. Mamunta – Mayoso Game Sanctuary
4. Tiwai Island Wild Life Sanctuaries

RECREATIONAL TOURIST SITES

1. Victoria park
2. Botanical Gardens, Fourah Bay College
3. Mrs Noah's Garden, Hill Station

TECHNOLOGICAL TOURIST SITES:

1. Diamond Mining Areas
2. Gold Mining Areas, Tonkolili and Kabala
3. Hydro Project and Dam, Bumbuna and Dodo in Kenema Districts
4. Guma Reservoir, Peninsular Area (Mile 13)
5. Freetown Industrial Zone, Wellington
6. Iron ore deposit, Pepel and Lunsar in the Northern Region

ARTS & CRAFTS CENTRES

1. Balmaya Arts & Crafts Gallery – Congo Cross