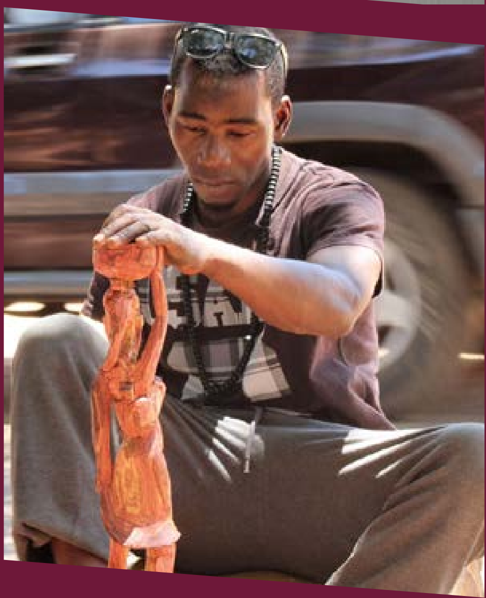
Republic of The Gambia

Youth and Trade Roadmap of The Gambia

2018-2022

Tourism Sector



YOUTH AND **TRADE ROADMAP** OF **THE GAMBIA**

TOURISM SECTOR

2018-2022

Republic of The Gambia

This Youth and Trade Roadmap for Tourism forms an integral part of The Gambia's Youth and Trade Roadmap. It was developed under the aegis of the Republic of The Gambia and the Ministry of Trade, Industry, Regional Integration and Employment (MOTIE). The strategy benefited from the contributions of sector stakeholders and youth associations, who played an important role in the consultative process. This roadmap was designed with the technical assistance of the International Trade Centre (ITC) within the framework the Youth Empowerment Project (YEP) and funded by the European Union Emergency Trust Fund for Africa.

This document reflects the ambitions of the public and private stakeholders who defined the enhancements and future orientations for the sector in view of developing economic opportunities for the youth in the tourism sector.

Note to the reader about the Youth and Trade Roadmap:

The Youth and Trade Roadmap for The Gambia sets out how to realize the full potential of trade for The Gambia's youth. The document will serve as a guiding compass for the government to bolster competitiveness and thereby reduce migration flows.

The principal outputs of the Youth and Trade Roadmap for The Gambia design initiative are four endorsed, coherent and comprehensive documents with five-year detailed plans of action (PoA) and implementation management framework. These documents include:

1. The Youth and Trade Roadmap document, which identifies trade sectors' growth potential and economic opportunities for the youth. The roadmap defines in a comprehensive manner a prioritized development framework at the national level around four pillars: skills development, entrepreneurship and self-employment, market-led value chain development and sector coordination.

2. Three individual sector roadmaps packaged as separate documents in line with the main document's overarching strategic objectives. The priority sectors offering the most promising potential for economic opportunities for the youth are:

- Nuts and agroprocessing
- Information and communications technology (ICT)
- Tourism.

Sector roadmaps present action plans with activities and priorities for building market-oriented skills and fostering value addition that will create employment opportunities and income generation for the youth. Specifically, each sector roadmap provides recommendations on improving productivity and quality, technical and vocational skills, market reach and diversification, and how to facilitate youth entrepreneurship.

The Youth Empowerment Project aims to reduce migration pressures in The Gambia. The four-year project takes a market-led approach and sets out to strengthen existing youth development systems, structures and services to create employment opportunities. It aims to scale up skills among youth in the workforce in response to market demands. The project offers possibilities for youths interested in moving into the commercial agriculture, service business or tourism sectors.

The EU Emergency Trust Fund for Africa addresses the root causes of irregular migration and displaced persons in Africa. More specifically, it helps address the root causes of destabilization, forced displacement and irregular migration by promoting equal opportunities, and strengthening security, development and resilience of vulnerable people.

ITC is the joint agency of the World Trade Organization and the United Nations. ITC helps businesses in developing countries to become more competitive in global markets, speeding economic development and contributing to the achievement of the United Nations Global Goals for sustainable development. As part of the ITC mandate of fostering sustainable development through increased trade opportunities, the Chief Economist and Export Strategy section offers a suite of trade-related strategy solutions to maximize the development pay-offs from trade. ITC-facilitated trade development strategies and roadmaps are oriented to the trade objectives of a country or region and can be tailored to high-level economic goals, specific development targets or particular sectors, allowing policymakers to choose their preferred level of engagement.

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ACKNOWLEDGMENTS

The Youth and Trade Roadmap for Tourism was developed under the aegis of the Ministry of Trade, Industry, Regional Integration and Employment (MOTIE) and the Ministry of Youth and Sports (MOYS), with the financial support and technical assistance of the Youth Empowerment Project (YEP).

The document particularly benefited from the inputs and guidance provided by the members of the tourism core team that steered the formulation of the sector strategy, namely:

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Mr. Baba Ceesay	Director General	National Centre For Arts & Culture (NCAC)
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Source: ITC

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FOREWORD

TOURISM CORE TEAM

“ A Great Opportunity for the Tourism Sector in The Gambia ”

The tourism core team of the Youth and Trade Roadmap is grateful to be part of this great opportunity to connect youth with the goals of the tourism sector in developing an inclusive and sustainable tourism destination.

The very essence of launching this roadmap as a team that includes stakeholders from youth, public agencies, private businesses, training institutions and communities is a source of confidence and support for the future implementation of the roadmap.

This Youth and Trade Roadmap for the tourism sector is part of The Gambia Youth Empowerment Project (YEP), a four-year European Union-funded initiative to build skills, enable value addition and foster market connections.

Our goals and responsibilities to ensure that the interests of all our members are represented throughout the design and implementation of the roadmap is a great opportunity for us to work together in creating sustainable tourism products through innovation, community-based development and youth empowerment.

For this, the core team is committed to the successful implementation of the plan of actions to carry the tourism sector forward sharing the Gambian culture, communities and landscape with the world while also contributing in providing a better future for our youth and turn our country into a beautiful place to live and visit.

We would like to thank our partners, the International Trade Centre and the European Union, for the support provided at this important time to help us create and seize these opportunities for our young population.

Sincerely,

Adama Bah
On behalf of the Tourism Core Team

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ACRONYMS

AACE	Association of Arts & Crafts Entrepreneurs
ASSERT	Association of Small Scale Enterprises in Responsible Tourism
CBT	Community-based tourism
FIT	Free independent travellers
FSDC	Fajara Skills Development Centre
FSQA	Food Safety and Quality Authority of The Gambia
GHA	Gambia Hotel Association
GIEPA	Gambia Investment and Export Promotion Agency
GTB	Gambia Tourism Board
GTHI	Gambia Tourism and Hospitality Institute
ICT	Information and communications technology
ITC	International Trade Centre
ITTOG	Institute of Travel and Tourism of The Gambia
MOTC	Ministry of Tourism & Culture
MOTIE	Ministry of Trade, Industry, Regional Integration and Employment
MOYS	Ministry of Youth and Sports
MSMEs	Micro, small and medium-sized enterprises
NCAC	National Centre For Arts & Culture
NGO	Non-governmental organization
PoA	Plan of action
SGA	Small group adventure
SMEs	Small and medium-sized enterprises
SMECS	SME Competitiveness Survey
TDA	Tourism Development Area
TGSB	The Gambia Standards Bureau
TTAG	Tourism and Travel Association of The Gambia
TVET	Technical and vocational education and training
UNWTO	United Nations World Tourism Organization
WTO	World Trade Organization
YEP	Youth Empowerment Project

Photo: ITC

EXECUTIVE SUMMARY

The Gambia's tourism industry is a major economic driver and a priority sector of the new National Development Plan to ensure positive spillover effects across the economy while enabling youth to contribute to the country's economic development.

The Gambia is mostly perceived as a seaside destination and has done well in developing the 'The Smiling Coast of Africa'. However, the richness of the natural and cultural assets found in The Gambian countryside could quickly become an attractive destination with a greater and widespread impact all across public and private interests. This could include the development of a national tourism brand that can provide greater economic benefits beyond the coastal offerings while also improving the country's social and economic development, particularly addressing the strong cycle of migration and unemployment of the youth in the countryside.

The ambition to disperse visitors across rural destinations faces special challenges. In particular, the environment of dependency on low-price-driven winter sun markets has created systemic obstacles to investing in and maintaining tourism facilities. This has contributed to low product innovation, lack of skilled staff and low access to finance. These factors constrain the development of a prosperous and sustainable industry and reduce employment opportunities for youth in rural areas. Therefore, there is a need to improve backward linkages with locally produced goods and create innovative tourism activities shaped with local communities, where places like the upper river region can brand their tourism offerings to become part of a nationwide tourism experience. This approach will allow tourism to be handled in a more inclusive manner whereby it can truly realize the industry's ability ensure economic progress and a sustainable contribution to poverty reduction and youth employment.

With strong confidence in the untapped potentials of The Gambian tourism industry, this roadmap initiative has helped mobilize the interests of the private and public actors to identify the bilateral economic opportunities found in developing a sustainable tourism industry that is capable of empowering youth all across the country. In summary, this document aims to serve three purposes: firstly, present the status of the sector and its challenges; secondly, inform stakeholders of the existing potential to improve and develop new tourism services upriver; and thirdly, provide a realistic roadmap and a plan of action (PoA) geared at achieving the following overall vision:

> "Developing inclusive and sustainable tourism products and services through youth empowerment."

To achieve this vision, the roadmap focuses on three strategic objectives.

Strategic objective 1: Foster the creation of diversified tourism products and services

The Gambia needs to develop new markets, products and distribution channels, which can diversify away from dependency on mass tour operators, enabling broader investments, maintenance and innovation. The quality of tourist infrastructures and services, especially in the countryside, is below what international tourists, particularly international tour operators, can expect to visit or sell as a destination. The roadmap is geared at improving and diversifying community-based and cultural tourism services up-country and developing new tourism services and products in coastal areas. Specifically, in terms of community-based tourism development, interventions will be twofold: on one side, the roadmap aims to reinforce the existing community-based tourism initiatives close to Banjul; and simultaneously develop similar initiatives in new destinations upriver, especially in the Janjanbureh area. Backward linkages with agriculture, local craft and e-marketing services will be developed, and forward linkages through new partnerships with outbound tour operators will take place in order to create new packages for their customers.

Strategic objective 2: Reinforce youth skills through vocational training and TVET strengthening

The upgrade of existing tourism services requires strengthening the skills across the sector and addressing training institutions' limited capacity. The challenge is to reduce the skills gap in the sector and improve the cooperation between the private sector and education providers to equip young people with the relevant skills needed in the market. This roadmap provides the foundations to improve the quality and relevance of the skills development programmes offered by education providers in tourism. The plan focuses on the revision of existing curriculum, the development of internship and apprenticeships schemes and identification of priority actions to address the needs of the private sector for specific occupations. The two main training institutions will be supported to upgrade their programme and build their capacities to deliver short-term courses to support the skills development plan of new tourism products upriver. The focus is to upskill youth involved in hospitality services, tour guiding, management of community-based information services and cultural events through high-impact training programmes.

Strategic objective 3: Develop and reinforce youth entrepreneurship in the tourism sector

Entrepreneurship and innovation appears to be quite limited in vocational education programmes. Just as the roadmap aims to develop innovative tourism services and reduce the skills gap, it will also supplement existing entrepreneurship and business growth support programmes with technical expertise in tourism and creative industries to build capacities of young entrepreneurs and small business owners. Simultaneously, actions include building the capacities of small tour operators to work effectively with local communities up-country to deliver a great and unique experience to visitors.

Market opportunities: The tourism industry creates a global market for inclusive tourism that is not necessarily reliant on the sun, sand and sea experience, creating new tourism products based on a destination's natural and local resources, alongside sustainable practices. This makes for an exciting opportunity for developing destinations to innovate through attainable means of creativity, strong partnerships and investing in human capital, particularly in youth skills development. Due to limited and uncertain demand, product development in the upriver region must balance risk through a combination of innovation and improving existing experiences that are already able to attract tourists. The roadmap has identified opportunities to diversify products and markets by

Source: cc flickr, (CC BY-NC-ND 2.0) Mariusz Kluzniak, gambian sunrise.

i) developing a small number of new community-based tours; ii) raising capacity to design and promote educational and study programmes; iii) developing the river cruise branding of the Ninki Nanka Trail into a new destination marketing strategy with enough innovative appeal to attract new markets to The Gambia.

The roadmap's overall market strategy is to develop new markets, including free independent travellers (FIT) interested in culture, students and youth travellers, small group adventure tourists travelling with specialist tour operators, students and researchers at international schools and universities, clubs and societies with an interest in local culture, birdwatching, art and music and the slave trade history trail, Gambian diaspora, and expats in The Gambia and West Africa.

The roadmap envisions the new branding development at the national level to successfully attract the identified new target markets. This brand should be inclusive of the current 'sea and sun' offer, and build on the current national branding of friendly and welcoming people. However, the brand should also encompass the attractions of upriver Gambia. The brand should also be suitable for targeting a younger demographic.

Achieving this roadmap's objectives requires a focused and coordinated effort around the detailed plan of action (PoA) that specifies a series of activities to be implemented during a five-year period. A great deal of consultation among public and private sector stakeholders has taken place to identify these priority actions. This is visible through the dialogue platform and the sector's core team that has been established. This collaboration among policymakers, technical agencies, young entrepreneurs, training institutions and development partners must continue during the implementation phase of the roadmap to ensure effectiveness and maximum impact. The implementation framework defines systematic management, monitoring and measurement mechanisms that are complementary to those identified in the National Development Plan. The establishment of this framework will determine this roadmap's degree of success.

Implementation of this roadmap will not only bring together stakeholders to cooperate in setting a new development path for the sector, it will provide economic opportunities for youth and entrepreneurs to contribute to the country's economic development.

Photo: ITC

BACKGROUND

The tourism industry is a major contributor to The Gambia's economy, having contributed 20% of gross domestic product (GDP) and 17% to total employment in 2015, supporting more than 35,000 direct and 40,000 indirect jobs,[1] and generating $68.2 million in tourism receipts. During the past years, The Gambia achieved steady growth (9% compared to the Sub-Saharan Africa average of 5%)[2] in tourist arrivals until 2013 when the outbreak of Ebola in some neighbouring countries caused a 9.1% decline in tourist arrivals from 171,200 in 2013 to 134,560 in 2015, setting back the 2020 target of achieving half a million arrivals. However, 2016 arrival figures showed a sign of recovery, with 161,127.[3]

The Gambia's comparative advantages in the tourism sector are its hot climate, pleasant beaches, English-speaking services, low prices and security. Despite these, The Gambia lacks the diversity and quality of services to attract free independent travellers (FIT), thus rendering the industry vulnerable to low negotiated and all-inclusive room rates. First, coupled with the high cost of imports and electricity price, this leaves hoteliers with low profit margins. Second, the all-inclusive rates do not include products and services other than those of the hotels, thus leaving limited opportunities for the stakeholders in the up-country to benefit from tourism. This result permeates the sector's vicious cycle – low profit means low investments in facilities, which translates into limited quality service delivery, which in turns limits the sector to attract higher-yield international visitors and thus constrains the sector's development growth.

Despite the claims of some academics that The Gambia is a responsible tourism destination, the image of The Gambia that is channelled abroad is essentially related to sex tourism. This paradox negatively impacts the destination's image and can sometimes discourage tourists to visit the country.[4]

Some of the key comparative advantages of The Gambia as a destination are summarized below:

- Between five and six hours' flight from Europe;
- An English-speaking country;
- More than 550 bird species for birdwatching enthusiasts;
- Breathtaking and captivating ecotourism products;
- Three world-acclaimed United Nations Educational, Scientific and Cultural Organization (UNESCO) heritage sites;
- Water sporting and fishing activities made possible by the Atlantic Ocean and Gambia River;
- Unspoilt beaches with 80 kilometers of pristine coastline;
- Pleasant subtropical climate with average daytime temperature of 27°C or 80°F;
- Eco-friendly parks such as the Abuko Nature Reserve, River Gambia National Park, and Kiang West National Park.[5]

1.– Tourism, Culture and Hospitality Strategy Plan, 2015–2020.

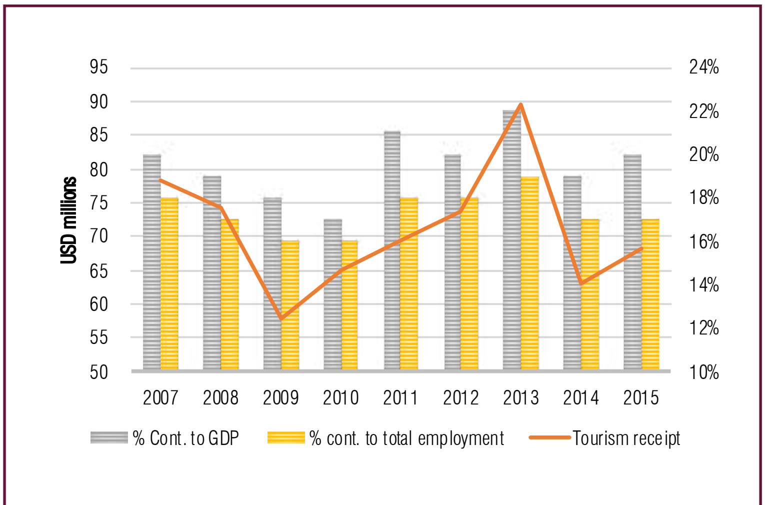
2.– United Nations World Tourism Organization (UNWTO).

3.– Ministry of Tourism & Culture, The Gambia Tourism Needs Assessment Report, 2017.

4.– ITC, Feasibility of a tourism component in the YEP project in The Gambia.

5.– Gambia Tourism Board (GTB), available from: http://www.visitthegambia.gm.

Figure 1: Tourism receipt and contribution to GDP and employment (2007–2015)



Source: The Gambia Tourism Needs Assessment Report, 2017.


Photo: ITC

TOURISM IN THE GAMBIA: A DEVELOPMENT PILLAR

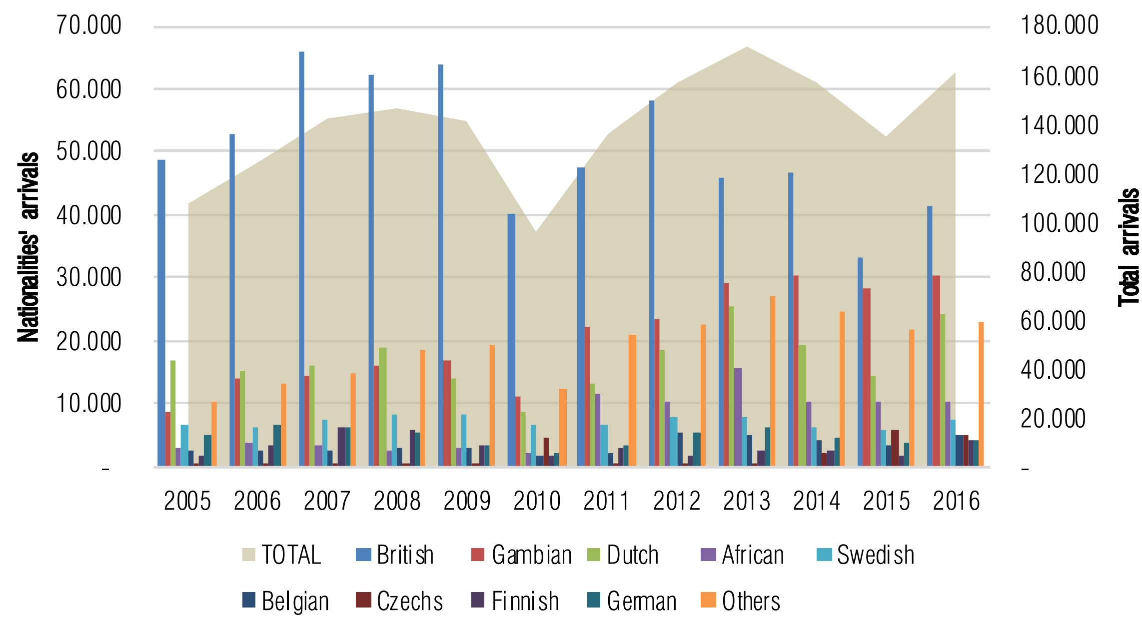
SECTOR PERFORMANCE

Although tourism is among the main contributors to the economy, its growth has been strongly affected by external factors in the past 10 years due to the market and product concentration. Between 2015 and 2017, the country has faced a period of political instability and epidemic outbreak in the subregion, which have negatively impacted the volume of international visitor arrivals (see figure 2).

The figure below reflects the high volatility of the main tourist markets. After several years of continuous growth, The Gambia first experienced a slowdown in additional year-on-year arrivals (as of 2004) before a progressive, then strong downturn in 2010. The year 2011 showed some recoveries in its source European markets – the United Kingdom of Great Britain and Northern Ireland, the Kingdom of the Netherlands and Scandinavia. Gambian tourism's strong dependence on the European markets is the main explanatory factor of these changes. Compared to both its neighbours and main competitors in the Economic Community of West African States (ECOWAS), with 84% of tourists travelling on Group Inclusive Tours (GIT), Gambian tourism is mostly tour-operator driven, with 13 international tour operators (including Thomas Cook, Gambia Experience and Vueling).[6]

6.– Gambia Tourism Board (GTB), available from: http://www.visitthegambia.gm.

Figure 2: Tourist arrivals by nationality – top 10 (2005–2016)

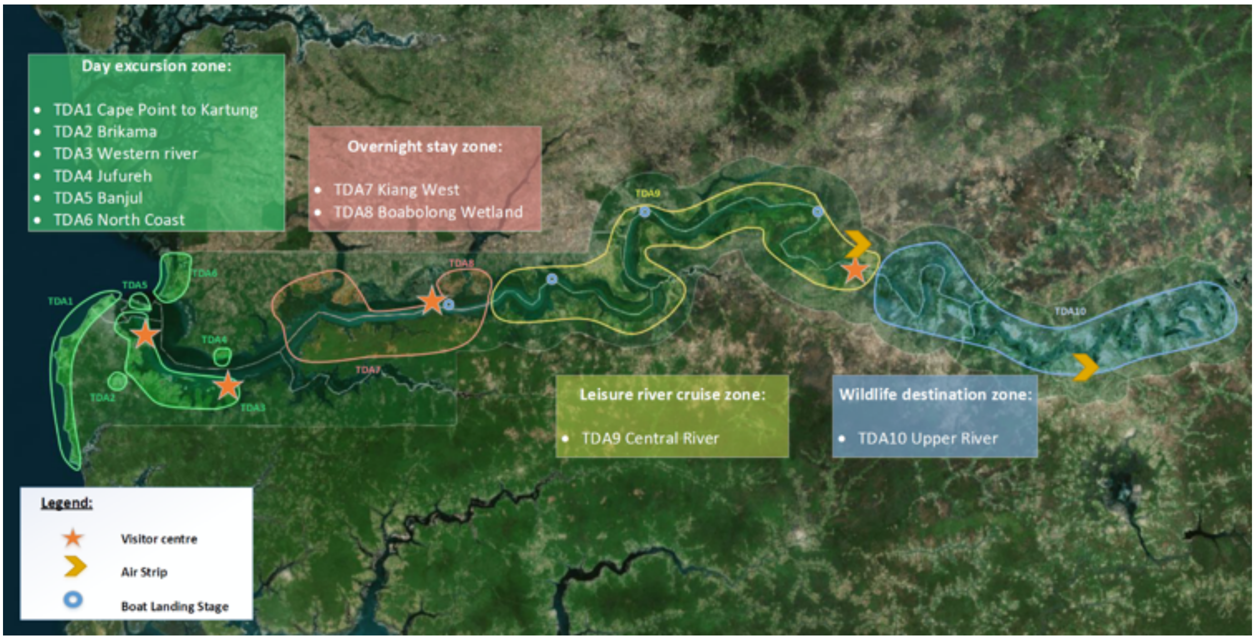


Source: The Gambia Tourism Needs Assessment Report, 2017.

Geographically, the bulk of activities in the tourism sector occur in the Greater Banjul Area (GBA). The main activities stretch from the coast of Banjul, through Cape Point, Fajara, Kotu and Bijilo to Brufut, where most of the hotels are located. To counter this concentration, the Government of The Gambia set up a tourism development framework in 2006 through its Tourism Development Master Plan, which aims to organize the territory around thematic touristic products. The territory is thus divided into four main categories from west to east: the day excursion zone, overnight stay zone, leisure river cruise zone and the wildlife destination zone. These four broad categories are separated into 10 Tourism Development Areas (TDAs). Before the Tourism Development Master Plan was developed in 2006, only the 1st TDA on the West Coast was in place, stretching from Cape Point to Kartung.[7]

7.– The Gambia Tourism Development Master Plan, 2006.

Figure 3: Tourism development areas in The Gambia



Source: The Gambia Tourism Development Master Plan, 2006.

Diversification attempts have been initiated, but have thus far failed, partly due to the commercialization structure of services in The Gambia. There is an increasing amount of emphasis placed on new possible products such as responsible tourism, eco-resorts and heritage tourism in national policies. However, people mostly consume tourism products from the global supply of holiday providers (i.e. buying a holiday to The Gambia from a tourism company) and these suppliers dictate market demand. Once at a destination, a second level of market supply comes into play. Tourism consumers (or their tourism providers) buy and consume products and services in the destination marketplace that are derived from the multiple services- and goods-based supply chains. It is in this second market that local economic impact is actually generated. The primary market providers (tourism operators) are crucial when it comes to generating demand in the secondary market by virtue of their action, which is to channel consumers to the destination.[8]

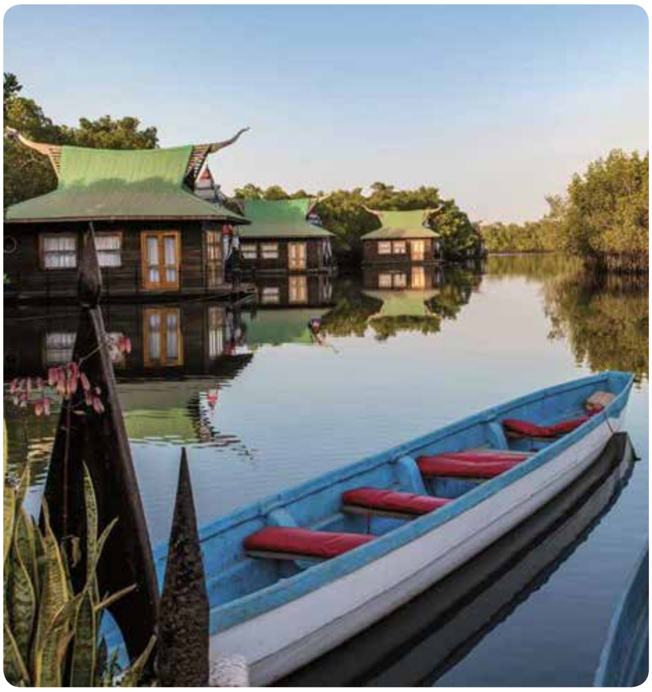
Another major issue preventing geographical diversification is the poor infrastructure in some areas (roads, river crossing, power, telecommunications and unreliable running water delivery), which limits the attractiveness of the products the country has to offer and ultimately increases their costs. Unless there is considerable provision and availability in much-improved facilities, including decent accommodation and transport in the interior, The Gambia's intention to develop nationwide tourism will be unachievable. There has been commendable progress in the roads at the North Bank, Central Region and Upper Region, whilst the Lower Region is in dire need of work to be completed. The biggest challenge for inland tourism and movement in the interior

8.– ITC, *Op. Cit*.

– particularly the North Bank Region – is the Banjul–Barra ferry crossing. At best, the ferries are dilapidated (besides a new one which started operating in 2017) and can take up to three hours to cross what is otherwise a 15-minute trip, in addition to having to wait several hours to board with one's own transport. This is obviously a huge challenge to taking tourism outside the Greater Banjul Area and towards the well sought-after interests of Juffureh, Albreda, Kunta Kinteh Island, Fort Bullen and the World Heritage Wassu stone circles, etc.

Products and services quality is rather similar to all emerging destinations worldwide, but there is a huge gap between The Gambia's coastal and up-country regions. Products and services rarely comply with international quality standards in the up-country. The majority of tourism stakeholders perform badly at each node of the tourism supply chain in secondary destinations. This is explained, in part, by the lack of technical and vocational education and training (TVET) facilities and training programmes available to the locals outside of the coastal area. Especially in the up-country, the strong seasonality of tourism is possibly one of the biggest weaknesses, in that it is a cause of serious imbalance in tourism stakeholders' activities, with serious consequences for businesses, people employed in tourism, tourist areas and, ultimately, tourism's proven capacity to generate wealth and prosperity. In terms of seasonality, the peak season is in winter, from November–April. The low season is called the green season, and is from May–October. [9]

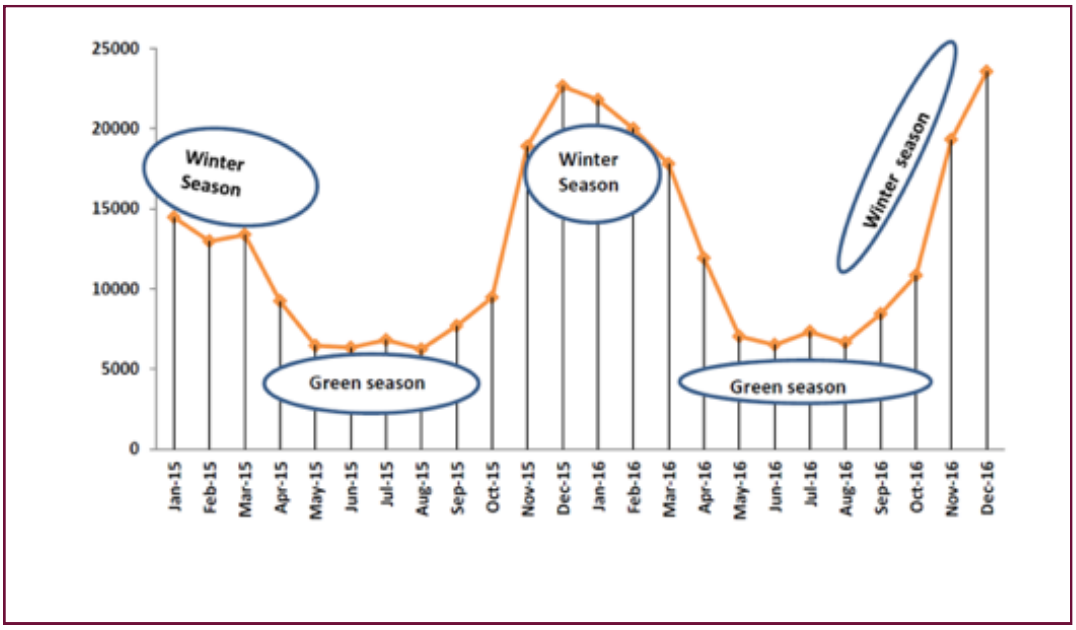
9.– *Ibid.*



Source: Mandina Lodges, ITC

The Gambia is not well known on the tourism scene and its image is still inextricably linked with that of sex tourism. Predominantly middle-aged white women from Europe and the United States of America visit The Gambia's beach resorts looking for a 'holiday romance', in which local young men – known as bumsters – exchange sex for money, gifts or visas.

Figure 4: Graph depicting seasonality (2015–2016)

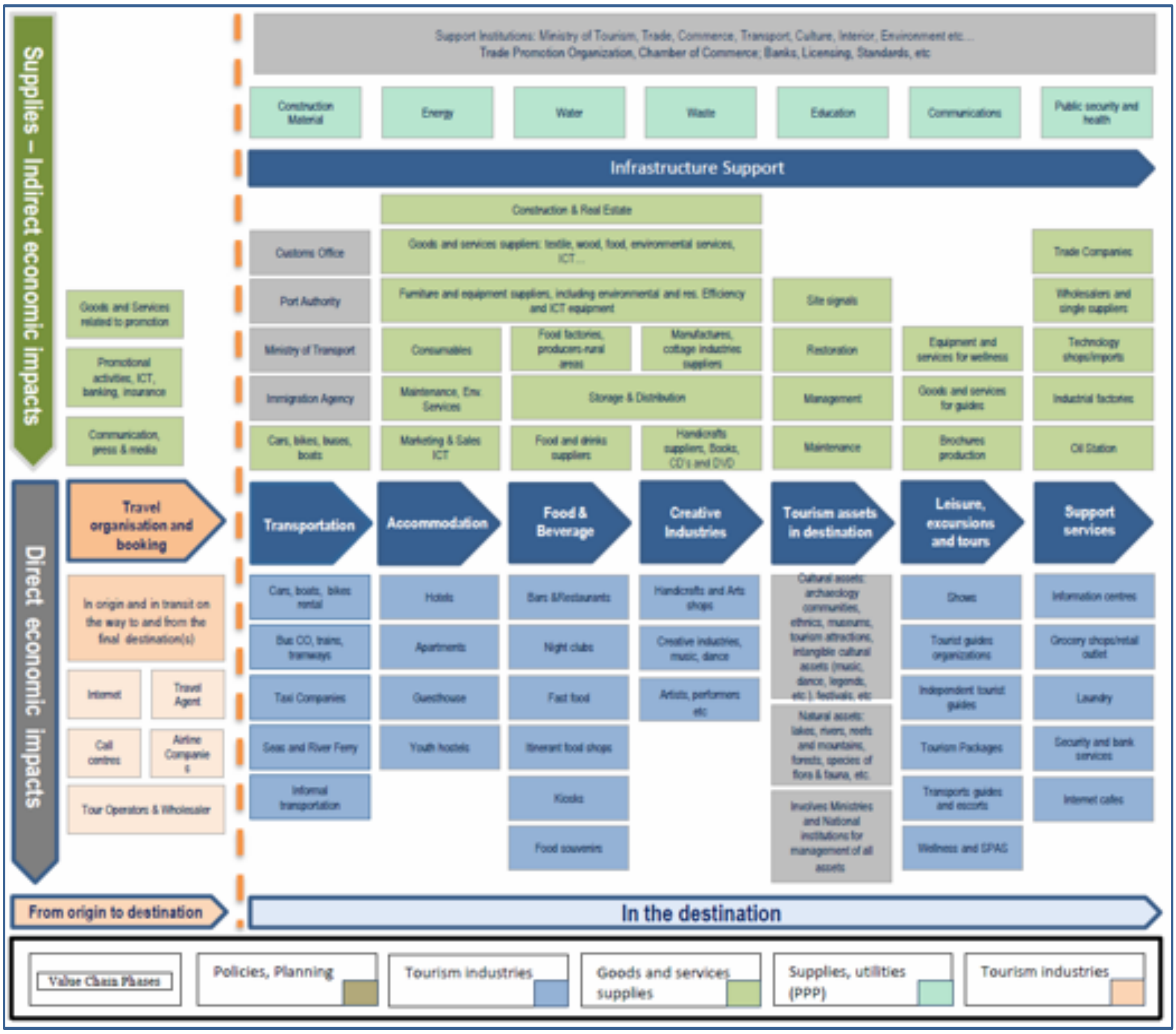


Source: GTB, 2017.

VALUE CHAIN ANALYSIS

Figure 5 represents The Gambian tourism sector's value chain starting from holiday planning to the visitor experience.

Figure 5: Value chain mapping in the tourism sector



Source: UNWTO/ITC/WTO, based on UNWTO-EC Sustainable Tourism for Development (2013).

Accommodation

The Gambia has 41 hotels, 30 up-country accommodation facilities and 101 guest houses and lodges. These hotels are concentrated along the coastline from Cape Point in Bakau to Bijilo and Brufut. The hotels range from two-star to five-star, as per the hotel classification system introduced in 2010. According to the last conducted review of classification, there are eight two-star hotels, 13 three-star hotels, nine four-star hotels and six five-star hotels. Five hotels have not been classified yet. When looking at the outlook of the four- and five-star hotels, it remains satisfactory even if the service standards can be further improved. The conditions in lower-ranging hotels, especially some of the two- and three-star categories, need to be improved significantly.

While a few of these hotels have, in the past two or three years, been refurbished or additional rooms added, the majority of hotels have not undertaken any additional room construction in the last five years. However, with a few hotels now under construction, their completion will bring the total hotel bed capacity to approximately 9,000 by 2018. In the rural areas, there are virtually no hotels, except for hunting camps, lodges and a few ecotourism facilities of reasonable standards.

In general, business for many of these tourism accommodation facilities is seasonal, just like in the urban centre (TDA1) as opposed to it being year-round. Many of these accommodation facilities operate between October and April, with the remaining five months being a slow period when hotel workers are laid off.

As of 2017, the accommodation capacity is substantially short of the government's planned target. The target set by the Ministry of Tourism & Culture and the GTB is to bring 500,000 tourists by the year 2020. Given that the total hotel bed capacity as of 2017 is approximately 7,000, there is need to build additional high-standard hotels that will provide more beds to cater for the deficit of 27,000 beds to accommodate the projected arrivals of 350,000 by 2020.

The hotel industry constitutes one of the most energy- and resource-intensive branches of The Gambia's tourist industry. Substantial quantities of energy are consumed in providing comfort and services to guests, many of who are accustomed to and willing to pay for exclusive amenities, treatment and entertainment. The energy efficiency of the many different end users in hotel facilities is frequently low, and the resulting environmental impacts are, therefore, typically greater than those caused by other types of buildings of similar size. The effects on the environment are caused by the excessive consumption of local and imported resources, such as water, food, electricity and fuels, and emissions released into the air, water and soil. The large quantities of waste products generated in hotel facilities pose a further significant environmental threat. The energy use varies substantially between different types of hotels, and is affected by hotel size, class or category, the number of rooms, customer profile (guests visiting for business or on vacation), location (rural, remote or urban), climate zone, and the types of services, activities and amenities provided to guests.[10]

Air travel

The tourism sector's markets are inextricably linked with the air flights that operate into The Gambia, through Banjul. Whilst cruise ship calls and tourists entering The Gambia by road should be encouraged, the bulk of the tourist market will remain with air travel for the foreseeable future.

Banjul International Airport (BIA) is located in Yundum, approximately 24 km from Banjul. As a state-owned institution, the airport is managed and operated by Gambia Civil Aviation Authority (GCAA) and both charter and schedule flights operate in The Gambia. The airport has undertaken significant transformations that cater for all flights at an international level. Some schedule flights include Brussels Airlines, Vueling Airlines, Binter Canarias, Arik Air, Royal Air Maroc, and charted or non-schedule carriers include Gambia Experience from the United Kingdom, Thomas Cook UK, Corendon Airlines, TUI and Transavia from Holland.[11]

Sea and river transport

There are two major cruise boats that undertake river excursions mainly from Banjul to Juffureh and Lamin Lodge. However, these cruise boats are obsolete and, as such, cannot offer upmarket service. Other small boats and pirogues often join in to transport tourists to nearby attraction sites and river fishing, but lack required safety measures. The Gambia River provides marketable opportunities in terms of product diversification and could be a means of increasing tourist visitation to the destination. With the right types of vessels, round trips can be conducted from Banjul to Basse and back.

The jetties serve as harbour to river vessels, and provide alternative routes and experiences to access almost all parts of the destination. The river provides a unique experience and many tourists prefer it to road transportation. There are five major jetties along The Gambia River and almost all of them are dilapidated. The Juffureh jetty has been the most frequently used one and, as such, it has collapsed and is not usable anymore. There is an urgent need to fix this jetty, as it provides access to one of The Gambia's most important tourism product, 'The Roots', both a tour and festival that commemorates the enslavement and shipment of millions of Africans to the Americas and the Caribbean region. The other jetties also require urgent maintenance to prevent them from collapsing too.

Car hire

Car hire in The Gambia is growing due to its competitive flexibility in price. Direct booking with a choice of car rental services is available. There are six registered care hire companies: Afriq Cars, AB Rent A Car, Sukuta Camping Car Rental, West African Powersports, Rentacar Gambia and Eberek vehicle hirer.[12]

10.– Ministry of Tourism & Culture, *Op. Cit*.

11.– Gambia Tourism Board (GTB), available from: http://www.visitthegambia.gm.

12.– Gambia Tourism Board (GTB), available from: http://www.visitthegambia.gm.

Restaurants

The restaurant business has developed in parallel to the hotel sector, but has not received the same attention. The Gambia Hotel Association (GHA) is long-established, but the restaurant association represented by the Tourism and Travel Association of The Gambia (TTAG) has not had the same level of impact. Over the years, there has been a steady increase in the number of restaurants established, which can be attributed directly to the tourism industry. Repeat visitors or foreigners who wished to settle in The Gambia are the ones who established the majority of the restaurants.

Mostly located in the Kotu, Bijilo, Kololi and Fajara (in Bakau) areas, restaurants provide tourists with the opportunity to dine outside the hotels on a wide variety of continental and local dishes. They also provide entertainment to tourists in the form of music and dance as part of their services. In addition, they provide employment to thousands of Gambians, particularly between October and April when tourist numbers are high. There are approximately 100 restaurants and bars registered by the GTB.

Tour operators

There are two levels of tour operators in The Gambia:

- International tour operators: These international firms deal with all air and ground handling of tourists to and within The Gambia. Foreign tour operators contribute a lot to the development of tourism in The Gambia, especially during the winter season in source markets like the Netherlands (TUI, Corendon and Sundios), the United Kingdom (Gambia Experience, Thomas Cook UK and Olympic Travels), Scandinavia (Thomas Cook Northern Europe, Spies Denmark, Ving Norway and Ving Sweden), the Federal Republic of Germany (Meier's Weltreisen) and the Kingdom of Spain (Vueling and Binter Canarias).[13]
- Ground tour operators: There are two types of ground tour operators in The Gambia, based on the size of their businesses: category A and B. To be classified as a Category A operator, there is a minimum requirement of nine vehicles: two coaches (minimum 40 seats each), three minibuses (minimum 14 seats each) and four trucks or Land Rovers. For Category B, there is a minimum requirement of three vehicles, including a minivan and a Land Rover. The tourism industry constitutes four main Category A ground tour operators and six Category B tour operators.[14]

Tourist attractions

While the ground tour operators move tourists across the country, it is evident that places of attraction to visit are limited. The following are the main attraction sites:

- Banjul: The National Museum and Arch 22;
- Bakau: The Kachikally Museum and Crocodile Pool;
- North Bank and Central River: A few ecotourism sites (Sandele and Makasutu) and heritage sites (Fort Bullen, Juffureh and Kunta Kinteh Island);
- Stone circles of Kerr Batch and Wassu;
- Janjanbureh: Island town of Janjanbureh, including the Kankurang Centre.

There is a need to improve on the existing infrastructure of these sites, improve the quality of the historical artefacts, and for maintenance, storage and presentation. The general management of these sites and attractions is poor and, therefore, the personnel's competence and capacity need to be improved.[15]

Festivals

In memory of Kunta Kinteh and other slaves from The Gambia and West Africa, The Gambia organizes an annual festival called the International Roots Festival. The week-long festival is in May and attended by locals and international guests from other African countries, the United States of America, Jamaica, the Republic of Poland and the United Kingdom, etc. Other major festivals include:

- The annual International Food and Beverage Festival (February)
- The Gambia International Bird Festival (October)
- The Annual International Boat Fishing Competition (November).

These festivals are complemented by other community festivals celebrated throughout the year in various parts of the country:

- Banjul Demba Cultural Festival
- Sanyang International Cultural Festival
- Kartong Festival
- Amsterdam–Plymouth–Banjul Rally
- Trade fair
- Bureng (Koosee) Cultural Festival
- Maribantang–Dankunku Cultural Festival.[16]

Tour guides

Tour guides' function remains problematic and is still associated with the bumsters industry. The ground tour operators and hotels complained about the behaviour of

13.– Gambia Tourism Board (GTB), available from: http://www.visitthegambia.gm.

14.– Ministry of Tourism & Culture, *Op. Cit*.

15.– *Ibid*.

16.– Gambia Tourism Board (GTB), available from: http://www.visitthegambia.gm.

some tourist guides, which led to their confinement to a few locations. Such a situation had a negative impact on their business, since there are several main tourist areas in the Greater Banjul Area.

- The national tourist guides have formed an association to represent their interests and to officialise and structure their function. They have established their own rules to facilitate their modus operandi and they work with hotels to provide their guiding services to tourists.
- The challenges of official tourist guides include:
- Most tour guides have only acquired basic education, thus affecting their professional conduct and service delivery;
- The absence of a link between them and the hotels and of information on tourist arrivals affects their preparedness to offer exceptional service.[17]

Additionally, local guide certification programmes are outdated and the licensing mechanism is dysfunctional. There is a need to establish new policy and rules concerning tour guides. An important aspect is to integrate local tour guides in destinations upriver. Tour operators only use one person to manage groups to do activities up-country and do not work with local guides. There is a need to develop linkages to facilitate the access of local guides in rural areas to develop their services in order to improve the economic impact in rural communities.

Birdwatching is an important part of the tour guide business that needs to be strengthened and further developed. The recent support provided by the GTB to institutionalize The Gambia International Bird Festival is a step in the right direction. Such a festival, properly promoted and marketed, provides interesting potential to attract new tourists.

Transportation

There is a clear over-supply of tourist taxis, many of which are below safety and comfort standards. There are 750 tourist taxis distributed among eight 'car parks' within the TDA1. Approximately 95% of the tourist taxis are in a very bad state of repair, safety and comfort, and do not have air conditioning, which makes them very unconducive for the transportation of tourists. Due to the over-supply, many taxis do not have the opportunity to be hired for several days, causing easy friction among them, especially between the green and the regular yellow taxis, which often have much better conditions as well as much cheaper fares.[18]

The GTB, through its Quality Control Department, is responsible for the licensing and regulation of tourist transport providers. The GTB sets the criteria for licensing and is responsible for monitoring and making sure that there is compliance with the regulations.

17.– Ministry of Tourism & Culture, *Op. Cit*.

18.– *Ibid*.

Source: International Roots Festival, GTB.

Souvenirs and crafts

There are seven craft markets in The Gambia with a total of 304 stalls and 834 vendors.[19] In terms of the items for sale at craft markets, two areas dominate: wood carvings and tie-dye textiles, each craft accounting for approximately 40% of all retail units. Between 5% and 10% of products are roughly imported – predominantly masks, antique carvings, mud cloths and baskets from the Republic of Senegal, the Republic of Mali and other countries in West Africa.[20] There is also an increasing number of beads (jewellery) largely imported from the People's Republic of China and West Africa.

However, due to the urge to earn quick money, artisans produce in fragmented environments with no appreciation of market requirements, quality, design, standards and systematic organization of markets. Innovation, design and product adaptations are limited, given the low skill capacities of the producers. As a result, the appreciation of Gambian handicrafts, especially by tourists, becomes insignificant.

The sector's development is severely inhibited by the supply side (production) and the behaviour of local sellers at marketplaces.

Informal individual businesses

Informal individual businesses form a significant part of the tourism and hospitality stakeholders. These include non-official tour guides, fruits sellers, juice pressers, street and beach craft vendors and horse riders. Most of the people involved in these activities have only a basic education, thus impacting the quality of their service delivery in terms of weak customer care, poor material and limited business development skills.

Reinforcing the capacities of these individual businesses in areas of customer services, health and food safety handling or soft skills as well as assisting in accessing improved material would significantly improve the tourism experience while discovering the beaches and cultural sites.

19.– Ministry of Tourism & Culture, *Op. Cit.*

20.– McCombes, L. (2012). *Host–guest encounters in a Gambian 'love' bubble*. In W. Van Beek and A. Schmidt (Eds.), African Hosts and their Guests: Cultural Dynamics of Tourism (pp. 290–315). Boydell and Brewer.

The Gambia's tourism sector plays the role of a major economic driver for the country, but it has shown its fragility during the recent political crisis. Even though part of the downturn was due to external factors, other important weak points are the product and geographic concentration of the offer, the resulting strong seasonality and the market concentration related to the dependence on the international tour operators and poor infrastructure.

There appears to be weaknesses at each node of the tourism value chain. From the planning of holidays in the destination of origin to the departure from The Gambia, several issues, but also opportunities, need to be addressed in order to profit from the growing number of international visitors.

Although a major strength for The Gambia along its tourism value chain, the diversity of attractions and amenities is not commercially well exploited, as the products and services are either unavailable or not properly supplied. For markets other than the traditional all-inclusive visitors, this makes the visitor experience of rather poor quality. It is rather challenging, if not impossible, for free independent travellers (FIT) to travel to the up-country in the low season.

In particular, some segments have not attracted the attention they require for tourism sector development, such as restauration or community-based management. Strengthening new products and services and connecting with new operators will thus be key for the sector's growth.

Source: ITC

BUSINESS ENVIRONMENT AND RELATED SUPPORT SERVICES

POLICY FRAMEWORK FOR TOURISM

The tourism sector is either directly integrated or indirectly concerned by major national policies developed by the Government of The Gambia. Below is an overview of the relevant policy framework, from the broad to the most specific.

Long-term strategy

Vision 2020, adopted in 1996, was a first long-term strategy for accelerated and sustainable development. It gave the first recognition for the need to seek '*a well-educated, trained, skilled, healthy, self-reliant and enterprising population to facilitate the transformation of The Gambia into a financial centre, a tourist paradise, a trading, export oriented, agricultural and manufacturing nation, thriving on free market policies and a vibrant private sector; thereby guaranteeing a well-balanced ecosystem and a decent standard of living for one and all, under a system of government based on the consent of the citizenry*'. Vision 2020 thus mentions tourism as one of the first priority areas for the country's development.

Growth and employment plans

The Programme for Accelerated Growth and Employment (PAGE) 2012-2015 was the successor to The Gambia's Poverty Reduction Strategy Paper II (PRSP II). PAGE built on the gains of the PRSP II and drew lessons from the challenges experienced during previous programmes. PAGE integrated a particular sub-chapter on tourism aiming to help tourism contribute more to employment and economic growth. PAGE included measures such as: diversifying tourism products, developing new niche markets (especially ecotourism, cultural tourism, sport tourism and conference tourism), segmenting markets, establishing priorities and developing a plan for each segment, encouraging major investments in superior hotels with incentive packages, and, through public–private partnerships (PPP), strengthening backward and forward linkages with the rest of the economy.

A new National Development Plan (NDP) 2018–2021 was launched in February 2018 with a clear focus on youth development and tourism. With the new government, it was decided to fully revise the NDP in order to define new goals to "deliver good governance and accountability, social cohesion, and national reconciliation and a revitalized and transformed economy for the wellbeing of all Gambians". The plan will be realized through eight strategic priorities with a clear importance given to youth on "reaping the demographic dividend through an empowered youth" and by "promoting an inclusive and culture-centred tourism for sustainable growth". Over the plan period, the government goal for the industry is to make tourism a highly competitive and sustainable industry that is people–and culture centred, that celebrates Gambian cultural heritage and contributes to socio-economic development. Some of the key areas prioritized are development of a new policy, establishment of an e-visa, increased promotion (online and fairs), support to four TDAs to promote inclusive tourism, fostering of niche products (cultural tourism, ecotourism, river cruise, water sports, theme parks and Islamic tourism), development of a new curriculum at The Gambia Tourism and Hospitality Institute (GTHI), and introduction of new training on hotel classification at the GTB.

Trade and investment policies

The Gambia's Trade Policy (2011) places emphasis on policy thrusts on the creation of employment and reduction of poverty, through the use of trade potential, to enhance The Gambia's integration into the world economy. The trade policy addresses the broad goals for import and export policy, and focuses on addressing the challenges of trade imbalance and rendering The Gambia a net export nation. Within this framework, The Gambia's National Export Strategy (NES) 2013–2017 provides the goals for export development and promotion. Tourism is among the priority sectors identified by NES.

The Investment Policy Review (UNCTAD, 2017) is a new investment policy that aims to bring transparency and predictability for investors. However, even if the services sector is a major focus, through ICT, the tourism sector is not directly targeted by the investment policy review. The policy reminds about the role of TDAs and emphasizes that the GTB is mandated to grant access to land in these areas.

Micro, small and medium-sized enterprises (MSMEs) and entrepreneurship[21]

The National Employment Policy (NEP) and Strategies and Action Plan 2010 (NEAP) elaborated a set of strategies to reverse unemployment trends. Since then, small business development has become a key policy focus. The government has formulated a National Policy for MSMEs 2014–2018 that envisions the role of MSMEs as the key to economic development in the country.

21.– Analysis extracted from http://unctad.org/en/pages/PublicationWebflyer.aspx?publicationid=1919.

In coordination with the Investment Policy Review 2017, the National Entrepreneurship Policy (NEP) 2017 aims to build domestic capacities for the private sector. NEP integrates a specific focus on tourism, in particular ecotourism and backward linkages with agriculture and fisheries. The NEP approach to tourism development strongly emphasizes the environmental aspect and climate-smart approaches.

NEP also aims to tear down obstacles and abolish burdensome requirements that hamper business operations, set efficient bankruptcy procedures and provide a fair second chance to honest failed entrepreneurs. NEP will upgrade entrepreneurship education and skills, facilitate access to finance and support new businesses mobilizing innovation and technology to solve environmental challenges, and spreading ICT. NEP focuses on the inclusion of women and youth.

Tourism-specific policies[22]

The most recent tourism policy was formulated in 1996 for the period 1996–2001. This policy has never been reviewed. Since that period, the situation has changed dramatically, rendering the tourism policy obsolete. It does not cover issues such as the environmental impact, mitigation of the risks related to global shocks or the problems related to seasonality.

To bridge the lack of policy framework, the Tourism, Culture and Hospitality Strategic Plan (2015–2020) was formulated to guide the tourism sector's development. However, the financial resource needed to fund the Strategic Plan is not achievable, as it involves heavy investments such as the construction of a national theatre, development of a marina and water sporting venue, and theme parks, etc. In addition, the inclusion of the two entities of tourism and culture into one strategy has made implementation a challenge.

It is recommended that the strategy be reviewed to address the challenges mentioned above by setting realistic objectives, activities and targets along the tourism value chain, hospitality services, cultural activities and infrastructure, etc.

BUSINESS ENVIRONMENT

One of the major issues related to the overall business environment for services providers in the tourism industry is the lack of institutional decentralization. Tourism is managed at a central governmental level and not assimilated within local government plans. The district commercial offices are not empowered. This would facilitate all the administrative processing for new local entrepreneurs in the tourism industry. This lack of institutional decentralization limits the development of tourism activities in the regions.

There is also a persistent problem of the perception of The Gambia as a tourism destination. The uncertainty resulting from decades-long dictatorship affected confidence among tour operators and tourism stakeholders, hampering international demand. Moreover, the range or diversity of products in The Gambia is poor, making it difficult to attract and retain profiles of international visitors other than those currently entering the country.

Finally, another key issue is the regulatory framework related to the tourism sector. Established in 2011 by an Act of the National Assembly, the GTB devised tangible regulations to operationalize the board's functions and activities. However, these statutory documents have certain limitations and deficits that need to be revised. Certain Acts, like the Gaming and Betting Act, are obsolete and need to be revised to warrant new regulations, for example that are specific to gaming and betting in The Gambia.

SECTOR SUPPORT INSTITUTIONS

The sector presents a solid public division coordination orchestrated by the three public agencies under the leadership of the Ministry of Tourism & Culture. These are The Gambia Tourism Board, in charge of promoting The Gambia as a destination, the National Centre For Arts & Culture (NCAC), responsible for developing and promoting Gambian culture, and The Gambia Tourism and Hospitality Institute (GTHI), in charge of skills development in hospitality services. Additionally, to promote investment, develop business and export activities, and provide support to MSMEs – those directly and indirectly associated with the tourism sector – The Gambia Investment and Export Promotion Agency (GIEPA) aims to attract and facilitate investments in the country. GIEPA does this by focusing on ecotourism and national heritage, developing up-country tourism (hotels, tourist camps, sport fishing, river sports or cruising) and the development of five-star hotels, integrated resorts and marinas in the TDA.

Industry associations, especially The Gambia Hotel Association (GHA) and to a lesser extent the Tourism and Travel Association of The Gambia (TTAG) and the Association of Small Scale Enterprises in Responsible Tourism (ASSERT), mainly advocate on behalf of their membership and increasingly engage in marketing. However, in recent years, ASSERT faced difficulties in consolidating its fee-based memberships, which led to a reduction of activities and the emergence of a new tour operator association constituted of ground handler Class B operators.

Gambia Tourism Board
The Smiling Coast of Africa

22.– Ministry of Tourism & Culture, *Op. Cit.*

Major destination marketing activities are initiated by the public sector and driven by the GTB. Examples include regular attendance of international tourism trade fairs at the World Travel Market (WTM) in London or the Internationale Tourismus Borse (ITB) Convention in Berlin. Marketing campaigns initiated by the private sector seem to be very limited.

During the sector consultations, it became quite clear that there is a relatively good understanding of the roles and functions of the various institutions and majors actors in the sector. Also noted were some tensions between the private sector associations and the GTB concerning the support provided to small operators. It is also important to note that, although youth represent a significant part of the workforce (especially in hotels and restaurants), there is not a specific place within the public agencies or sector associations where they can voice their concerns or a youth network of entrepreneurs.

In order to grow further, the sector support institutions need to become more aware of the latest markets trends to adapt the positioning in terms of image and services to be offered. The public authorities have to improve their communication with small service providers and build a consensus among stakeholders in the public and private sectors around common development objectives. Additionally, the public agencies have to fully engage in ensuring that all services provided are reliable and on the same level of quality.

The table below summarizes the functions of the institutions supporting The Gambia's tourism sector.

Policy support network	Functions and role
Ministry of Tourism & Culture (MOTC)	The Ministry of Tourism & Culture is responsible for national policy formulation and strategic planning on tourism and culture matters. The ministry is responsible for the promulgation of legislation in the tourism sector, advising the executive on matters of tourism and culture, monitoring the tourism sector's performance, and acting as liaison with government agencies, international donor agencies, the private sector and non-governmental organizations (NGOs) on matters relating to tourism and culture. Through this, certain functions are assigned to various line agencies of the ministry, including: The Gambia Tourism Board (GTB), The National Centre For Arts & Culture (NCAC) and Gambia Tourism and Hospitality Institute (GTHI).
Ministry of Trade, Industry, Regional Integration and Employment (MOTIE)	MOTIE facilitates trade and promotes labour-intensive employment initiatives by leveraging resources and forging strong partnerships with the private sector for the transformation of The Gambia into a trading, export-oriented nation, thriving on free market policies and well-integrated into the multilateral trading system. MOTIE is responsible for establishing the appropriate setting for private sector development, improved economic growth, trade promotion, and a reduction in poverty through the preparation of trade policy programmes and employment policies, programmes and strategies for the private sector.
Ministry of Youth and Sports (MOYS)	MOYS is responsible for meeting policy issues and co-operating with donor agencies for the youth development programmes. MOYS: (1) supervises the groundwork and implementation of all youth programmes and related activities and enables the monitoring and assessment of these programmes through its coordinators in all government departments and regions; (2) creates partnerships with other related sectors involved youth activities; and (3) includes the National Youth Council, which is responsible for coordinating the different projects operated by various youth organizations and playing an active role in their promotion around the country.
Public agencies	
Gambia Tourism Board (GTB)	The GTB is the institution mandated by government to promote The Gambia as a tourism destination. The agency is responsible for promoting foreign and local investment in the tourism industry as well as advising the tourism sector and markets. They also work in cooperation with private partners to develop sustainable tourism products and services.
National Centre For Arts & Culture (NCAC)	The NCAC is a semi-autonomous institution established to promote and develop Gambian culture. It is the highest official decision-making body on all matters relating to arts and culture in the country. Some functions include: (1) advise the minister on matters of policy relating to arts and culture; (2) promote and develop Gambian art and culture; (3) promote artistic and cultural cooperation at regional and international levels; and (4) encourage, at the local level, the emergence of groups and institutions interested in the promotion of art and culture.
Gambia Investment and Export Promotion Agency (GIEPA)	GIEPA has a pivotal role in The Gambia, as it is the sole national trade support institution with a mandate to promote and facilitate investment, trade and competitiveness of Gambian businesses.
Food Safety and Quality Authority of The Gambia (FSQA)	The FSQA is the sole national competent authority with powers of delegation mandated to officially control the safety and quality of food and animal feed, whether locally produced, imported or destined for export. The authority's work is expected to contribute to consumer health and safety, the facilitation of trade and control of fraudulent and deceptive food marketing, labelling and advertising practices. The FSQA's responsibilities include: (1) official control of food safety and quality; (2) ensuring compliance with legal requirements; (3) carrying out inspection, sampling and certification of food and feed for import and export; (4) inspecting establishments, processes and products throughout the production and distribution chain; (5) assessing laboratory services; and (6) participating in activities relating to standards and technical regulations.
The Gambia Standards Bureau (TGSB)	The main purpose of The Gambia Standards Bureau (TGSB) is to standardize methods, processes and products (both imported and locally produced). It promotes standardization, conformity assessment and metrology in the fields of industry and commerce to support industrial efficiency and development. Additionally, it disseminates and promotes standards for public welfare, health and safety.

Policy support network	Functions and role
Sector associations	
Gambia Hotel Association (GHA)	The association's aim is to promote, nurture and foster tourism in The Gambia in collaboration with government agencies such as the GTB, the Ministry of Tourism & Culture (MOTC) and other stakeholders. The GHA is a recognized partner in setting the standards for Gambian tourism through collaborations with the GTB and by supporting The Gambia Tourism and Hospitality Institute (GTHI) in providing several training initiatives on various subjects to staff of member hotels. Additionally, the association contributes and participates in major travel fairs.
Association of Small Scale Enterprises in Responsible Tourism (ASSERT)	ASSERT's aim is to assist and support small-scale enterprises in tourism to trade fairly and pursue sustainable development, which contributes to the conservation of the physical environment and the social and economic welfare of The Gambia's community. Some key roles include: (1) developing partnerships with government, other institutions and external organizations; (2) contributing to sustainable development within The Gambian tourism industry using principles and practice of fair trade in tourism; (3) contributing to improving the tourism product in The Gambia and bringing development for the country; and (4) providing assistance to members with product development, marketing, training, quality control and access to finance.
Tourism and Travel Association of The Gambia (TTAG)	TTAG was formally formed as the Association of Ground Tour Operators to ensure the safe passage of visitors in The Gambia. TTAG has since opened its doors to other sectors of the tourist industry, such as restaurants, bars, car hire and shops. Members of TTAG aim to promote The Gambia as a destination, increase tourism, improve services, provide advice and encourage fundraising.
Ground Handler Class B Operators	The Association of Class B Tour Operators has been established recently by a group of seven small tour operators to represent their interests in front of local authorities.
National Tourist Guide Association (not active)	The National Tourist Guide Association (NTGA) used to be part of the World Federation of Tourist Guide Associations, but it is no longer listed on that website and there is no activity on the Facebook group. There were also official tourist guides (OTGs) in The Gambia, comprised of uniformed, badged freelance private tour guides who went through a selection and training process and were bound to abide by a strict code of conduct. They were by licensed the GTB.
Chef Association Gambia	Chef Association Gambia is a non-profit organization with more than 6,000 members of the country's finest chefs, restaurateurs, educators, learners and culinarians. The association is a national representative body for all those passionate about food and the culinary arts of international and Gambian cuisine, and provides skills and support to improve service and access to a wealth of culinary knowledge.
Association of Arts & Crafts Entrepreneurs (AACE)	AACE is an organization that represents businesspeople in the artistic creative fields who make tie dye, batiks, wooden masks, paintings, baskets, African-style jewellery and other trinkets.
Education providers and entrepreneur support services	
Training institutions	Gambia Tourism and Hospitality Institute (GTHI) is a government-established centre that offers training in four disciplines: bar and restaurant service, housekeeping and laundry, front office and reception, and cookery and pastry. The Institute of Travel and Tourism of The Gambia (ITTOG) is a specialist tourism college that offers a wide range of courses, including travel and tourism level 1–4, cabin crew, business studies and teacher training. The Young Men's Christian Association (YMCA), Fajara Skills Development Centre (FSDC) and Gambia Technical Training Institute (GTTI). See table 1: Main TVET institutions in tourism for detailed information.
Startup Incubator Gambia	Startup Incubator's objective is to support the successful development of young Gambian entrepreneurs through an array of business support services and resources, developed and orchestrated by incubatormanagement and offered both in the Startup Incubator and through its network of contacts. Successful completion of the programme increases the likelihood that a business will start and stay in business for the long-term.
Empretec Gambia	Empretec's objective is to train and prepare entrepreneurs to establish successful enterprises or grow and expand their businesses.

The tourism sector's development is supported and centrally managed by public institutions. The limited number of international visitors to The Gambia, and more particularly the small diversity of nationalities and profiles, reflect a lack of impact and a low efficiency of the current public and private sectors' marketing and promotion strategies. Successful destinations are able to attract a great diversity of visitors by following a clear national tourism strategic development plan defining key priorities supported by financial resources. The public and private sectors need to develop a new strategy addressing the challenges identified in this roadmap. This entails the definition of an innovative branding strategy, promoting sustainable tourism products and services, and building public institutions' capacity to embrace this change.

KEY COMPETITIVE CONSTRAINTS IN THE TOURISM SECTOR

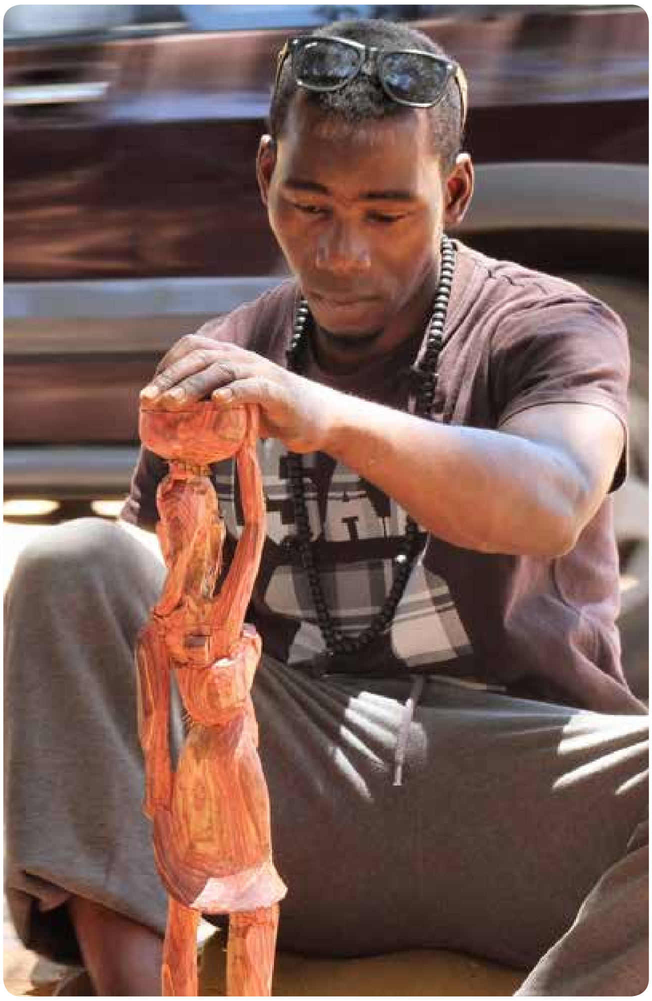
The competitiveness constraints in the tourism sector were identified based on the SME Competitiveness Survey (SMECS) carried out by ITC. The survey data was collected with the help of GIEPA. The survey has been conducted on 37 firms. Micro and small firms represented the largest share, with 57% of the surveyed enterprises. Youth-led enterprises only represent 22% of the sample. The basic sample information can be found in Annex I.

The ITC SME Competitiveness Survey assesses firms' strengths and weaknesses, the wider business ecosystem and the national environment to help identify what growth bottlenecks firms are facing. The survey is split into three key pillars:

- Capacity to compete is the static dimension of competitiveness. It assesses whether current production is efficient and meets market requirements.
- Capacity to connect is the connectivity dimension of competitiveness. To be competitive, firms must link to customers, businesses and institutions, and be literate in information and communications technology.
- Capacity to change is the dynamic dimension of competitiveness. It assesses whether firms have the capacity to make human and financial investments to adapt to fast-changing markets.

The pillars are further subdivided into two levels:

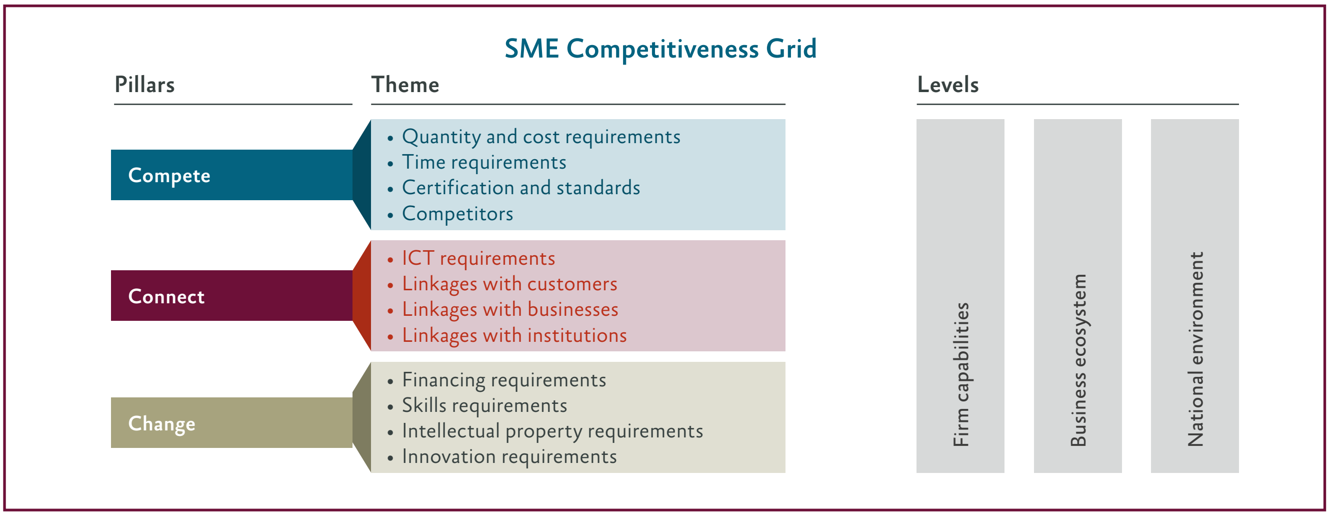
- Firm capabilities assesses whether firms can manage resources under their control.
- The business ecosystem is made up of support institutions that supply enterprises with the resources or competences they need to be competitive.



Source: ITC

Figure 6 shows how the pillars and levels fit together.

Figure 6: ITC SME Competitiveness Survey



Source: ITC SME Competitiveness Survey, 2017. For more details, visit: http: / / www.intracen.org/SMECS/.

The following two sections will present an overview of the results on the two levels, the firm capabilities and the business ecosystem. Each level is then analysed, focusing on the theme showing the lowest performance.

Note: The rankings are always presented in a score between 0 and 100, 100–80 scoring as excellent, 80–60 as good, 60–40 as satisfactory, 40–20 as poor and 20–0 as very poor.[23]

ASSESSMENT OF FIRM LEVEL CAPABILITIES USING SME COMPETITIVENESS SURVEY RESULTS

The SME Competitiveness Survey clearly pinpoints shortcomings in firms' capacity to evolve and change. This is reflected in the lack of product and market diversification of the tourism sector presented in the sector performance review. For small and large firms, innovation, and, more particularly, the resources allocated to R&D, appears to be the weakest point. This problem particularly affects medium-sized enterprises. The lack of appropriate skills is also a problem for all enterprise categories and confirms findings presented earlier. Among all indicators, the ones ranging below average (below the 50 circle) are:

- Certification and standards: The scores show that certification and standards represent a particular problem for medium-sized firms, as well as small-sized firms to a lesser extent. The quality assurance in the tourism sector is quite complex, as it applies to a variety of different products, goods, services and processes. The standards cover a variety of areas, such as accommodation (ISO 9001, as well as other more specific ISO standards, eco-labels and online rating tools such as tripadvisor.com, etc.), restaurants (food safety), tour guides, tour operators, tourism-related service providers (ISO standards exist for a variety of different activities encompassing certain risks such as snorkelling, adventure tourism, wellness or medical tourism, and many other areas), and goods related to the tourism industry (crafts and textiles, etc.). Due to this variety of areas for certification, enterprises, particularly MSMEs, have limited capacity to achieve compliance. This is due to financial shortcomings and limited awareness and understanding of the requirements and the areas requiring certification. As a result, the level of service quality is quite low among smaller service providers, which is specifically a problem in the food safety and hygiene area.

23.– For more details on the ITC SME Competitiveness Survey, visit: http://www.intracen.org/SMECS/.

Figure 7: Firm level capabilities assessment

Source: ITC SME Competitiveness Survey, 2017. For more details, visit: http: / / www.intracen.org/SMECS/.

This is particularly true outside of the coastal areas, where the quality of products and services are far from being of international quality standards. Accommodation and food providers suffer from a shortage of electric and food supplies, impacting on their ability to provide proper meals and services to their customers. The safety of existing nature-based products and the limited experience associated with, and especially the quality of, river transportation services along The Gambia River are also discouraging international operators to commercialize these products to middle-range to upscale markets.

- Skill requirements: The survey asked companies if they had an available training activity to overcome the lack of skills. The low scores signify that a low proportion of firms offer some kind of training to their staff. This is in line with the previous analysis, and the finding showing that even larger low-cost hotels tend to keep the investment into their staff to a minimum level to avoid losing their margin.
- Innovation requirements: The survey asked firms to rate resources secured for R&D. All firms, regardless of size, responded that they tended to have a very limited investment into R&D, which limits their capacity to innovate and develop new products. The lack of investment into R&D may be motivated by the dependency of hostelry to a single product and to market limitation induced by tour operators. Firms may not see the need to develop new products in this context. In addition, there is limited R&D support stemming from the supporting institution, as reflected by the scores in the next section.

ASSESSMENT OF THE BUSINESS ECOSYSTEM USING SME COMPETITIVENESS SURVEY RESULTS

As with firm level issues, external factors related to the business ecosystem also mostly affect firms in their capacity to change in line with market needs. These results demonstrate that the lack of product diversification in the tourism industry is both stemming from firms and from their immediate business environment and institutions supporting them. In addition, firms' capacity to compete is impaired by cost requirements, and specifically the access to electricity. Among all the change indicators, the following ones are particularly problematic for the sector and will need to be addressed by the roadmap:

Figure 8: Business ecosystem assessment

Source: ITC SME Competitiveness Survey, 2017.

- Innovation requirements: Tourism companies cannot count on the contribution of special innovation research units like they can in the processing industries. Imitation and outsourcing are the most important means of disseminating innovation in the tourism industry. In the case of creative innovation, it is possible to borrow innovative ideas from other countries and adapt to the local environment (e.g. luxury river cruises). In the case of outsourcing, innovations are handled by specialized external companies or consultants (e.g. adventure tourism or sport activities such as kitesurfing). According to the OECD's Innovation and Growth in Tourism, in the case of destinations, innovations usually involve cooperation between various service providers.[24] In The Gambia, private and public collaboration has been limited to the creation of festivals and management of tourist sites, and not to jointly develop new products and services. There is a very limited number of partnerships with foreign small adventure or cultural tour operators or educational programmes.

  Tourism services providers have to constantly use technologies to conceive and sensationalize their guests' experience well in advance. For example, the tourism sector was one of the first to adopt communication technologies and thus become one of the most important sectors of e-business today. Tourism is fundamentally an 'experience industry' and it is constantly progressing to meet clients' needs and create new value for customers within a competitive framework. For example, the creation of a destination brand built around a unique shared authentic experience can reinforce the differentiation between competitors. This type of innovative branding strategy can lead to an improved willingness to pay a premium price on the part of the visitors. An innovation-oriented tourism policy is needed to drive this innovation process and promote new forms of partnerships and business models (e.g. social enterprises) and attract investment for the renewal of equipment and installations to develop the existing tourism products and to create new ones, such as the upriver experience.

  An innovation-oriented policy requires public and public partnerships to go beyond the status quo of the coastal tourism offers, which, although being a significant contribution to the sector, are not enough to compete with the global trends in tourism that revolve around a harmony of commercial and sustainable tourism practices based on cultural, natural and special interest offerings. These trends are an opportunity for developing destinations to compete and rebrand themselves. As the tourism industry creates a global market for inclusive tourism that is not necessarily reliant on the sun, sand and sea experience, creating new tourism products based on a destination's natural and local resources, alongside sustainable practices, is an exciting opportunity for developing destinations to innovate through attainable means of creativity, strong partnerships and investing in human capital, particularly in youth skills development.

- Financial requirements: Access to financial institutions is a major obstacle to MSMEs' current operations, negatively impacting their capacities to change. Results show that all sizes of firms are impacted by the issue. The main issue is the very high interest rates that banks require from the private sector. Banks are reluctant to lend to the private industry, because it is more profitable for them to invest in government Treasury Bills. This creates a vicious circle whereby the demand for credit by the government crowds out private sector borrowers, which in turn makes it more difficult for entrepreneurs to establish or expand their businesses. It is, however, healthy businesses that could generate the revenues needed by the government for development. This crowding out also raises the cost of borrowing, which makes it expensive for firms to carry out their business. A study by the World Bank has shown that, at market-lending rates of 25% to 28%, which are currently prevailing in The Gambia, only firms with a profit margin of 35% can afford to borrow to finance their operations.[25]

- Skill requirements: Under this indicator, the education system's quality is gauged by assessing the employees whom firms are hiring from the local workforce. Two particular aspects are assessed: the difficulty to find appropriate skills and the level of employees' preparedness to integrate with the work environment (which is linked to the worker's previous experience, in apprenticeships or internships, for instance). The overall results show a very high difficulty in finding appropriate skills in the workforce, for all firm sizes. Firms also find that 30% of the junior staff coming from vocational and technical education training are poorly prepared. This percentage is lower for college and university students, which clearly points to the need to strengthen vocational training related to the tourism sector. The skills gap is analysed in detail in the following section.

- Intellectual property requirements: Intellectual property issues are particularly relevant to any exporting or services industry such as tourism, especially linked to creatives industries. The Gambia signed the Paris Convention for the Protection of Industrial Property and the Bern Convention for the Protection of Literary and Artistic Works. In 2003, the country enacted its own Copyright Act. In theory, this law provides adequate protection for intellectual property, patents, copyrights and trademarks. The government has also signed and ratified both the

24.– http://www.liaa.gov.lv/files/liaa/attachments/turisms/petijumi/OECD_Tourism_innovation_growth.pdf.

25.– Draft National Development Plan, The Gambia, 2018–2021.

Source: cc flickr, (CC BY-NC 2.0) jbdodane, Serrekunda, Gambia.

WIPO Copyrights Treaty and WTO TRIPS agreement.[26] However, the survey results show that IP protection is difficult to arrange, particularly for larger firms. This is due to the fact that IP laws, although existing, are not complemented by an enforcement mechanism, especially on patents, trademarks[27] and copyright. Many young artists, especially in the local music industry, face difficulties collecting royalties for the use of their music broadcasted on the radio or sold informally. This leaves firms and young entrepreneurs unprotected for their original products and discourages innovation.

26.– Private Sector Development Strategy (2015–2019).

27.– National Export Strategy (NES), 2013–2017.

In line with the sector performance and value chain analysis, the SME competitiveness assessment shows that the major problems faced by firms in the tourism sector are linked to their insufficient capacity to change and address market needs. This issue is mostly due to the existing skills gap in the workforce and insufficient quality compliance. The business environment is also hampered by difficult access to finance, insufficient support to develop new tourism products and services as well as the absence of legal protection of creative industries for intellectual property. These competitiveness constraints are the root causes impeding the development of MSMEs in the tourism. These factors prevent the creation of new jobs for the abundant young population.

SKILLS GAPS AND SKILLS DEVELOPMENT ISSUES

One of the main challenges facing The Gambia's economy is the absence of skilled labour. Close to 60% of the labour force has no formal education. According to the 2012 Gambia Labour Force Survey, 10.9% of the population of 15 years and older received some vocational training qualification. The adult literacy rate is 51%. There is a dramatic imbalance in terms of availability and quality of labour within The Gambia. Such a difference is partly due to the absence of TVET institutions in the countryside, but also to the low or lack of interest in the tourism sector to develop new destinations upriver.

The tourism sector is not an exception to this trend. However, the predominance of a low-cost service offer creates another additional issue that is very specific to the tourism industry. The low-cost accommodation establishments, often specializing in all-inclusive offers, tend to propose only low wages in order to be able to generate a margin. Thus, hotels tend to reduce their employment qualification requirements and look for non-qualified workers, even if they could employ workers with specialized qualifications coming from TVET or higher education. This is one of the reasons that explain why only 25% of employees in the tourism sector have a secondary level education and 10% primary (averages between tourism service providers in figure 9). As a result, young people who receive diplomas specializing in the tourism industry face problems finding jobs in the sector and, when they do, they will only work for a minimum period of time to get enough professional experience to find a similar job abroad offering a higher wage (often on cruise ships or the European job market). This also explains the high turnover of employees in the hospitality sector.

In addition to limiting qualified youth from the hospitality services and tourism sector in general, the all-inclusive rates do not include products and services other than those offered in these hotels. This leaves limited opportunities for the other providers, especially in the regions upriver, to access the market and integrate the existing value chain. This permeates the sector's vicious cycle – low profit means low investments in facilities, which translates into limited quality service delivery, which in turn limits the sector in attracting higher-yield international visitors and thus constrains the development growth of the sector. These observations go in line with the findings of studies about the all-inclusive offer, showing that these types of establishments tend to have limited benefits to the local communities due to their cost structures and narrow margins.[28]

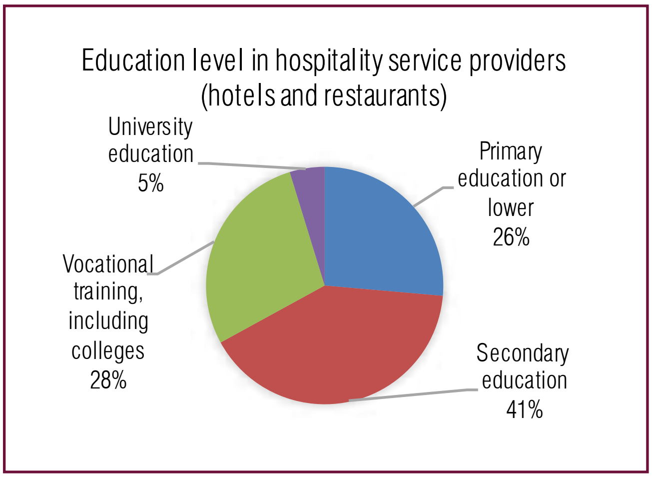
A SME Competitiveness Survey was carried out by ITC to better understand the current employment situation in the tourism sector, especially concerning skills gaps and issues faced by small and medium-sized enterprises (SMEs) when recruiting young people. The key findings can be summarized as follows.

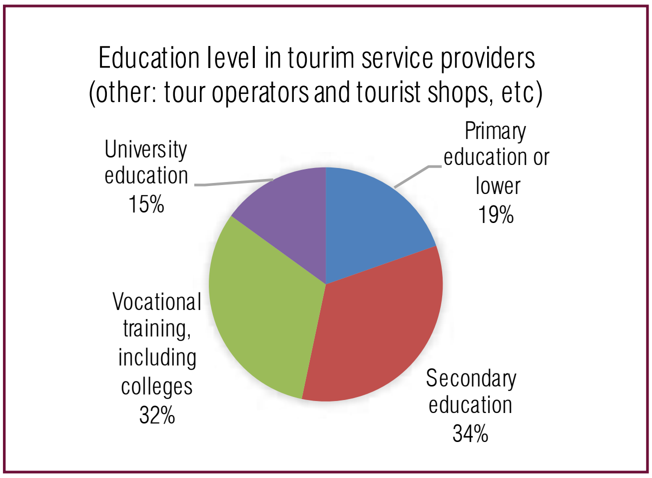
28.– Tourism Concern, The impacts of all-inclusive hotels on working conditions and labour rights, 2014.

LEVEL OF EDUCATION IN THE TOURISM SECTOR

Enterprises in the tourism sector hire a majority of employees with a low level of education, either primary or secondary education, representing 67% in the case of hospitality services. Employees having received a vocational training education represent only approximately 30%, whether for hospitality services or other service providers. The proportion changes concerning employees with university education between the two types of providers.

Figure 9: Level of education of employees in the sector



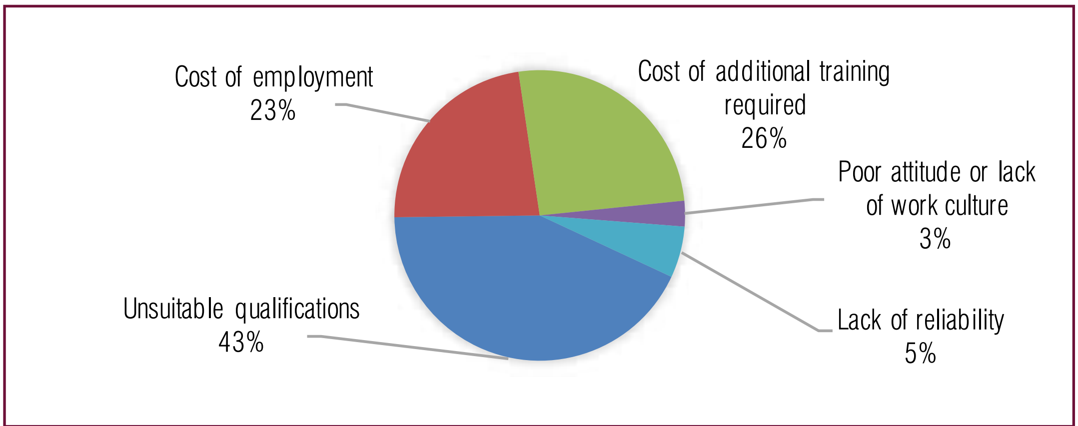


Source: ITC SMECS, The Gambia, 2017.

SKILLS GAP ANALYSIS

Enterprises in the tourism sector claim unsuitable qualifications to be the greatest barrier in employing young people, followed by the cost of additional training required. This clearly shows the skills gap between the private sector's need and the level of competence of young people looking for a job in the tourism sector.

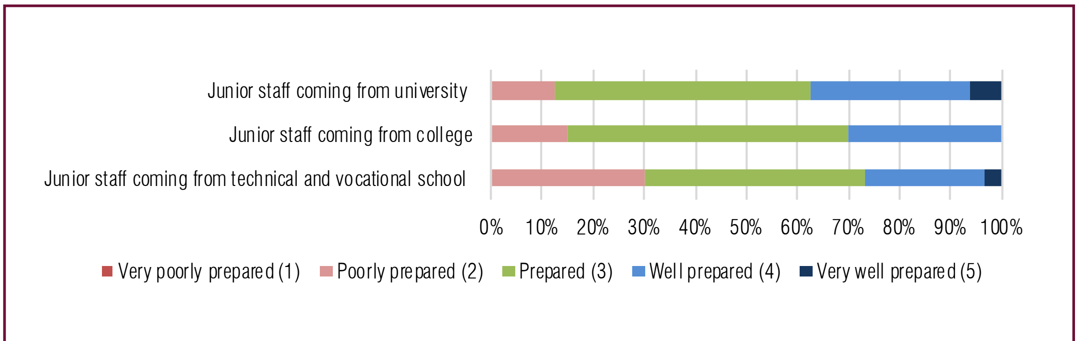
Figure 10: Overview of barriers in employing young people by sector



Source: ITC SMECS, The Gambia, 2017.

Junior staff coming from college and university are better prepared than those coming from technical and vocational school. It is important to highlight that 30% of staff educated in technical and vocational schools are qualified as poorly prepared, whereas they represent 50% of the employees in the tourism sector (see figure 11).

Figure 11: Preparedness of staff by level of education



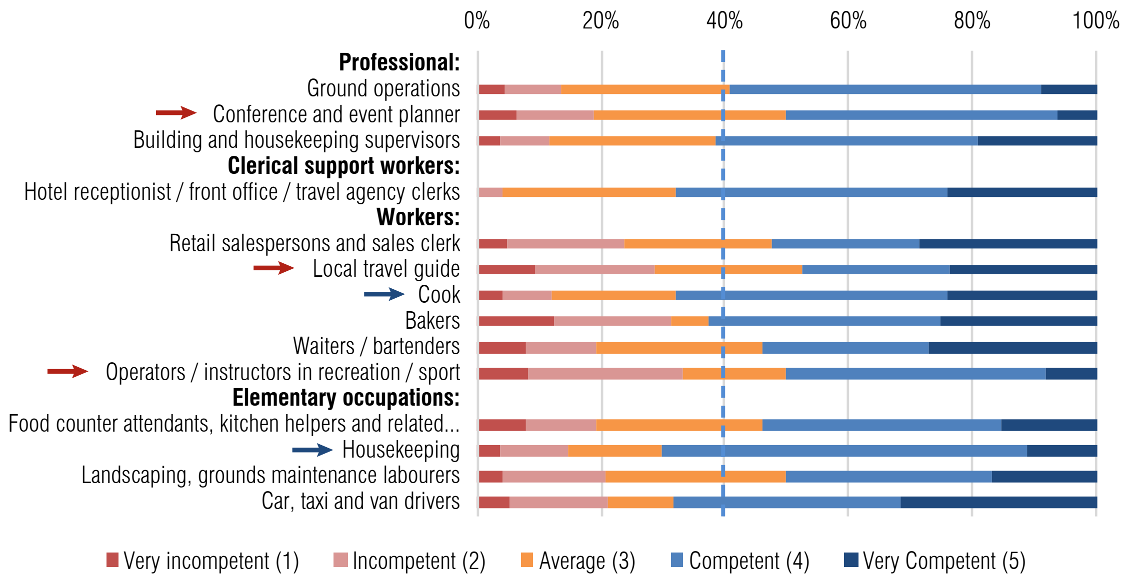
Source: ITC SMECS, The Gambia, 2017.

The competency level illustrated in figure 12 shows that it is relatively mixed across the type of occupations and their complexity. At a glance, the occupations for which the competency level classified as competent begins at approximately 40% (blue bar around before or starting the vertical blue round dotted line) and shows an overall satisfactory level of competence in the sector. There are three occupations that seem to present clear lower competency levels:

- Operators and instructors in recreation and sports
- Conference and event planner
- Local travel guide.

Additionally, professions such as bakers present relatively high levels of incompetency.

Figure 12: Level of competencies – tourism



Source: ITC SMECS, The Gambia, 2017.

MOST-NEEDED OCCUPATIONS

The following occupations in figure 13 are sorted based on the magnitude of the skill gap, which is measured by the frequency of that occupation appearing on the most-needed list of respondents and the level of difficulty of finding a person with appropriate skills that match the job description.

The most-needed occupations in the tourism sector with the largest skill gaps are:
- Cooks
- Housekeeping
- Waiters, bartenders and hotel managers.

The wide disparity between staffing needs and qualified applicants, particularly in those occupations that require highly technical or specialized skills, indicates a shortage in skilled workers. While finding a promising candidate to fill such positions has proven difficult (perhaps because of the specificity of the skills needed), those who succeed in securing the positions are typically competent (shown in figure 12).

Figure 13: Most-needed occupations in tourism

Most-needed occupations in tourism	Score
Cook	24
Housekeeping	10
Waiters and bartenders	7
Hotel manager	6
Retail salespersons and sales clerk	5
Restaurant and food service managers	2
Tour guides	1

Source: ITC SMECS, The Gambia, 2017 (Partial results displayed. Complete list available upon request.)[29]

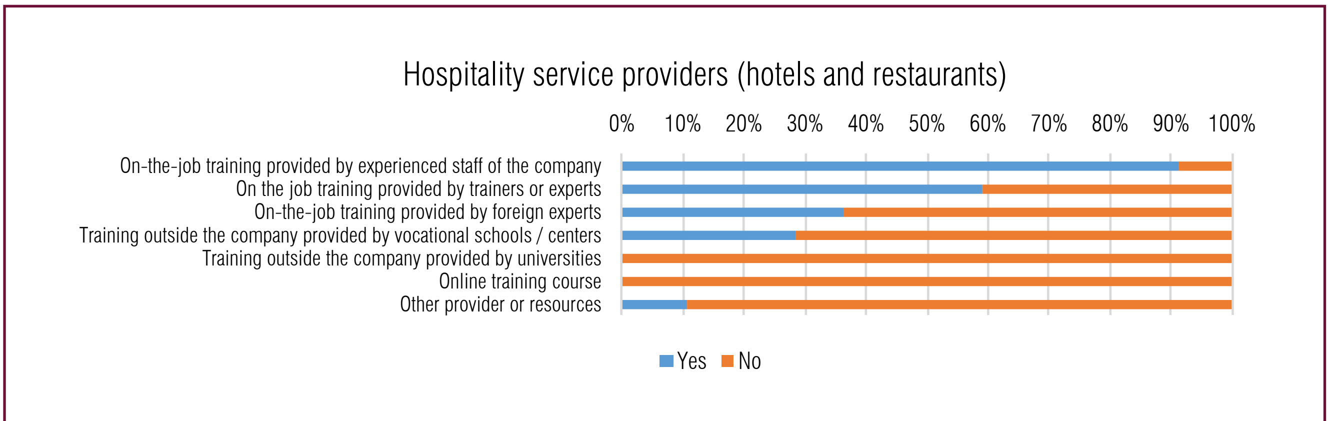
29.– The score is the sum of points accumulated by its occupations based on the number of occurrences and position given by the respondent for the three most-needed occupations (1st place: 3 points, 2nd place: 2 points and 3rd place: 1 point).

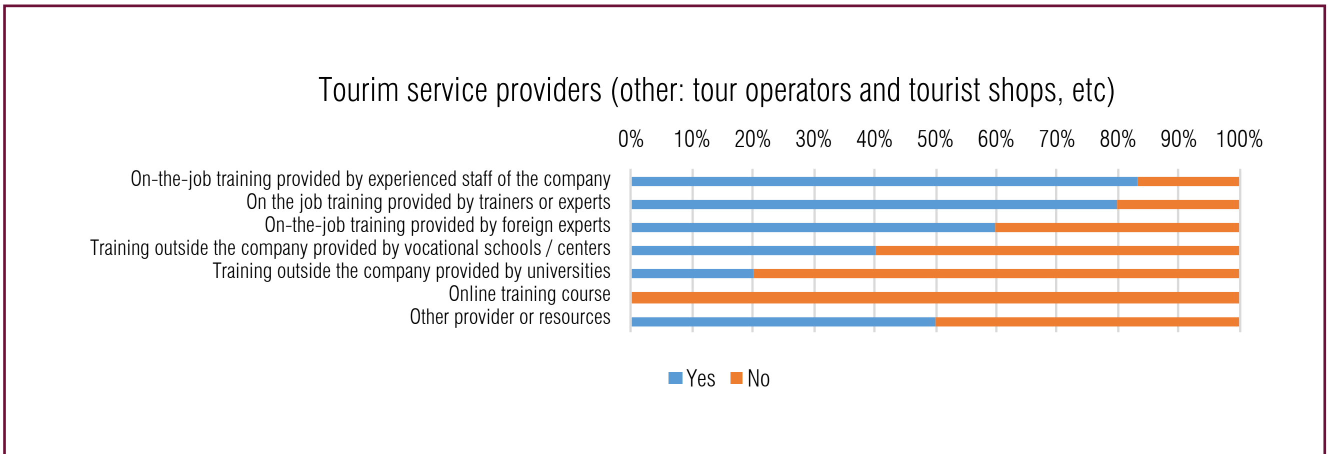
TYPES OF TRAINING, INTERNSHIP AND MENTORING PROVIDED TO OVERCOME THE CURRENT SKILLS GAP

The majority of the companies report that they provide on-the-job training to overcome the skills gap. Figure 13 presents the type of training provided by the hospitality services (referred to as hotels) and other service providers to their staff. The commonest method used by companies, either hotels or the rest, to upgrade their employees' skills is to use experienced staff to deliver the training (90% for hotels). For the other categories of training services, hotels and other service providers use the same type services: the use of experts or trainers is widely used, followed by foreign experts. However, there is a clear difference in terms of practise. Indeed, hotels tend to use fewer other types of training services compared to the rest of the service providers.

It is important to note that 30% of the hotels and 20% of the service providers provide training outside the job through vocational schools. Online training is non-existent in the sector.

Figure 14: Types of training and mentoring that companies provide to their employees



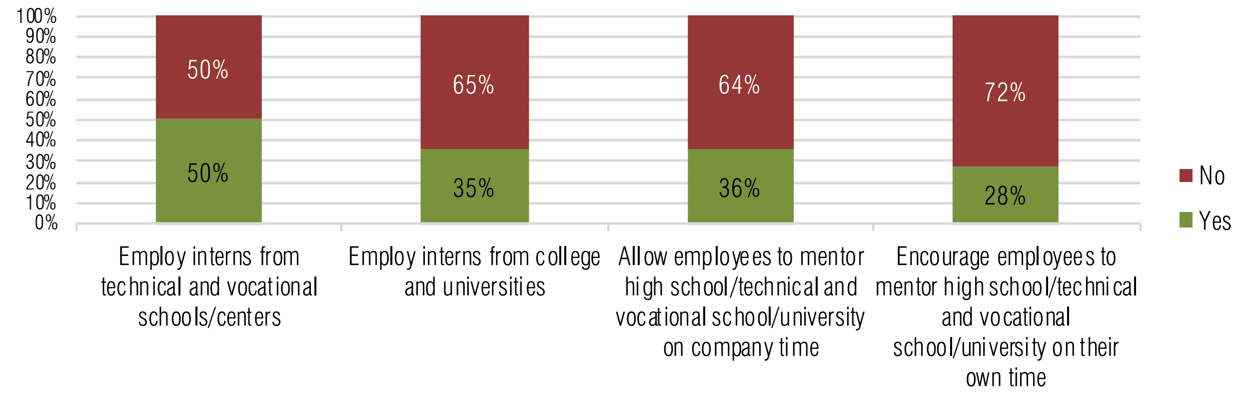


Source: ITC SMECS, The Gambia, 2017.

Half of the companies employ interns and only a few companies facilitate mentorship. When looking at the detailed information, 50% of the companies employ interns coming from technical and vocational schools, whereas only one-third receive interns from college and universities. It is very surprising to see that only 50% of the companies in the tourism sector employ interns from TVET, whereas 55% of the employees have been educated in the TVET (see figure 15). Internship should normally be integrated as part of the TVET curriculum. Given the low level of preparedness of students with TVET education (figure 11), it is important that a greater number of companies hire interns. This would be a way to improve the overall competency level in the sector.

Less than one-third of the companies promote mentoring of their employees with a vocational school or university. The share of companies allowing employees to mentor high school, technical and vocational school or university on company time represents only 36%. The percentage drops even lower, to 28%, when it comes to companies actually encouraging employees to mentor on their own time. This clearly demonstrates a clear lack of collaboration between the private sector and training providers to collaborate and find a way to better match the needs of businesses and reduce the skills gap in youth employment.

Figure 15: Enterprises' facilitation of mentorship or internship



Source: ITC SMECS, The Gambia, 2017.

Technical and vocational skills development suffer from weak links with the market. Even after graduating, the youth might still lack the appropriate market skills. The skills gap analysis based on the results of ITC SMEC survey shows the perception of the private sector towards the relatively low level of competency across the sector. Whereas half the employees in the tourism industry have been educated in vocational schools, the private sector employees qualify as poorly prepared, with more than 30% of their staff educated in technical and vocational schools. This clearly demonstrates a skill gap in the tourism sector.

When it comes to youth employment, enterprises also claim that unsuitable qualifications is the greatest barrier to employing young people, followed by the cost of additional training required. According to companies, junior staff coming from college and university are better prepared than those coming from technical and vocational schools.

It seems that the private sector tries to remedy the skills gap problem on its own. The majority of the companies provide on-the-job training. However, this effort does not tackle the root cause of the problem –as identified earlier by the mismatch between the level of competency of educated youth and the need of the private sector. Only half the companies employ interns and less than one-third of the companies promote mentoring of their employees with vocational school or universities.

Therefore, the challenge to reduce the skills gap in the tourism sector is to improve the cooperation between the private sector and TVET providers to equip young people with the relevant skills needed in the market. This entails the revision of existing curricula, the development of internship and apprenticeship schemes and identification of priority actions to address the private sector's needs for specific occupations.

In this line, the skills gap analysis has identified the occupations with the highest need: cooks, housekeeping, waiters and bartenders, and hotel managers. It has also identified the three occupations that seem to clear lower competency levels: operators and instructors in recreation and sports, conference and event planners, and local travel guides.

TVET MAPPING IN THE TOURISM SECTOR

When looking at The Gambia's tourism-specific TVET landscape, the sector's concentration in the coastal areas reflects a limited availability of TVET establishments beyond these areas. In addition, the lack of qualified instructors and the absence of complete and detailed course curricula covering all aspects and specifics of both the demand and the supply sides hamper the effectiveness of the current vocational training offering.

Five accredited TVET institutions offer training specialized in the tourism sector, and two short-term courses providers are available. Table 1 provides a summary.

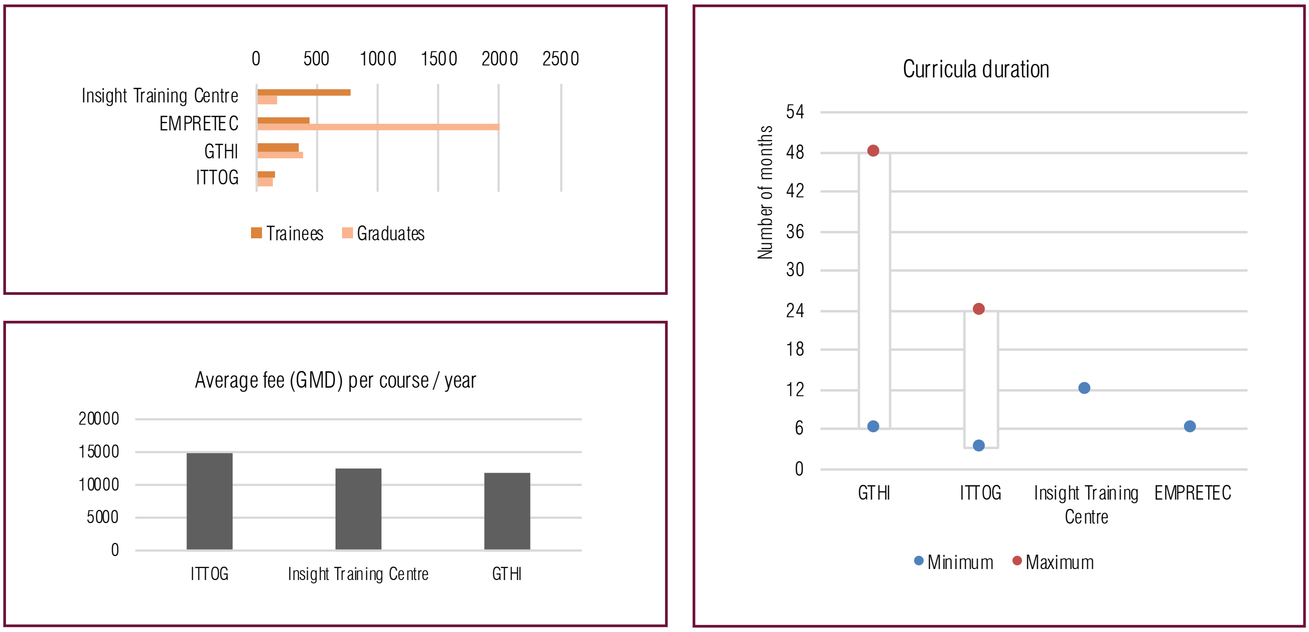
Among these institutions, GTHI and ITTOG focus solely on tourism and both are based in Banjul. GTHI is a public institution and ITTOG is private, and both are fee-based. They graduated 387 and 138 students respectively in 2016. GTHI offers courses on management, tailoring and cooking, entrepreneurship, housekeeping and laundry, front office, bar and restaurant, and cooking and pastry.

ITTOG specializes in general travel and tourism, ICT understanding, management, languages, cabin crew, airport operation and the Amadeus booking system. GTHI has a wide variety of course lengths, ranging between six months and four years, whereas ITTOG provides shorter courses of between three months and two years. Figure 15 provides a snapshot of all four TVET institutions involved in the tourism sector.

Table 1: Main TVET institutions in tourism

Institution	Public or private	Fees	Number of trainees in 2016	Number of teachers in 2016	Focus areas in tourism
Accredited TVET institutions					
Gambia Tourism and Hospitality Institute (GTHI)	Public	Fee-based	167 men 187 women	24 full-time 5 part-time	Broad understanding of the context of tourism and hospitality in The Gambia, life skills with relation to job seeking, health and lifelong learning, service excellence in hospitality, hospitality communication in English, relevant hospitality law at operational level, accounting principles applied to hospitality, entrepreneurial skills to start a small business, management skills in their technical area of specialization, computer skills
Institute of Travel and Tourism of The Gambia (ITTOG)	Private	Fee-based	61 men 92 women	6 full-time 3 part-time	ICT, management, travel and tourism, languages, tourism and hospitality, cabin crew, airport operation, Amadeus booking system
Young Men's Christian Association (YMCA)	Non-governmental	Fee-based	330 men 243 women	6 full-time 5 part-time	YMCA provides courses in catering and hotel management
Fajara Skills Development Centre (FSDC)	Non-governmental	Fee-based	–	–	Beauty courses (hairdressing and cosmetics)
Gambia Technical Training Institute (GTTI)	Public	Fee-based	2 000 trainees	140 full-time 15 part-time	Tourism and hospitality management
Short-term course providers					
Empretec Gambia	Public	Free	210 men 230 women		Provide an entrepreneurship course on food outlet in the tourism industry
Insight Training Centre	Private	Fee-based	414 men 356 women		Travel and tourism general course

Figure 16: TVET institutions – key facts for tourism



Source: ITC TVET mapping.

There is a very limited offering in tourism-related subject matters within Gambian TVET institutions beyond the Banjul region. This is due to the fact that the sector is geographically concentrated in this region and that there is limited demand stemming from the trainees and the private sector to develop courses and specific content in rural areas.

In order to boost the sector diversification in terms of products and covered regions, national policies will need to focus on skills development and TVET beyond the Banjul area to support the development effort on new tourism activities in rural areas.

FROM COMPETITIVENESS ISSUES TO LEVERAGING MARKET OPPORTUNITIES FOR THE YOUTH

There appear to be weaknesses at each node of the tourism value chain in The Gambia. From the planning of holidays in the destination of origin to the departure from The Gambia, several issues, but also opportunities, need to be addressed in order to make profit from the growing number of international visitors worldwide. The rich cultural and natural diversity of the up-country regions give The Gambia the opportunity to develop destinations to supplement the unfortunately well-renowned sex tourism destination that the coastal area is. For this to happen, the roadmap provides (in the next chapter) a detailed analysis of the market trends positively impacting the offering of new tourism products and services and where youth employment opportunities could be leveraged.

Source: ITC

THE WAY FORWARD: YOUTH EMPLOYMENT OPPORTUNITIES IN TOURISM

The tourism sector possesses significant potential to impart socioeconomic contributions to The Gambia and provide economic opportunities for the youth. In order to realize this potential, competitiveness constraints and structural deficiencies will be addressed and identified opportunities will be leveraged.

The following is a delineation of the proposed vision and strategic approach in this direction.

Source: Community Based Tourism, ITC

THE VISION

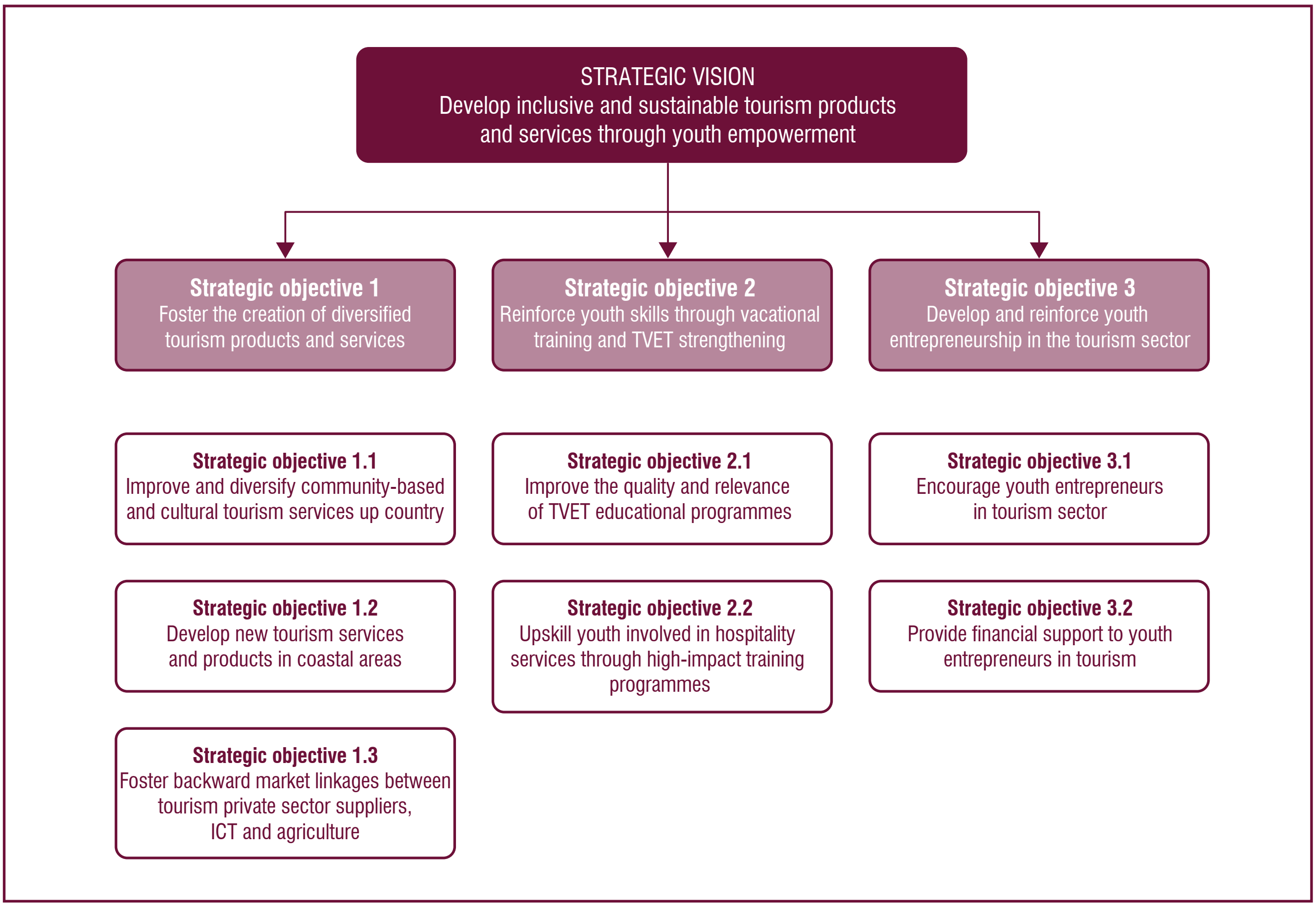
Stakeholders engaged throughout the roadmap design process have agreed on the following vision statement:

> "Developing inclusive and sustainable tourism products and services through youth empowerment."

STRATEGIC OBJECTIVES FOR YOUTH EMPOWERMENT IN THE TOURISM SECTOR

The roadmap's vision is delineated on three strategic objectives built around the key areas where action is required during the next five years. The plan of action (PoA) detailed on page 55 will respond to this vision by addressing the sector's constraints while leveraging economic opportunities for the youth in a comprehensive manner.

Source: ITC



The table below summarizes a conceptual SWOT analysis that the ITC team carried out through the listing of possible major internal and external factors that could impact the development of a sustainable form of tourism in The Gambia.

Built on The Gambia's strengths and opportunities that should facilitate further development of tourism, the analysis also includes the areas in need of further improvement and the potential obstacles that must be overcome.

STRENGTHS	WEAKNESSES
Gambian people's friendliness Good value for money Simplicity Existing community-based initiatives Existing handicrafts skills and production Existing tourism networks and associations Product diversity (coastal and inland) Relative proximity to source markets	Poor state of tourism and tourism-related infrastructures Limited number of high-standard facilities Insufficient marketing in source markets Lack of communication between tourism stakeholders Food safety and hygiene problems Limited access by air Lack of local ground handler Few or limited markets High cost of finance Absence of qualified skills Poor quality and diversity of tourism products High number of bumsters in coastal area
OPPORTUNITIES	**THREATS**
New image: the new Gambia Natural resources in the up-country regions Growing demand for Africa Increased intraregional and international air services Prevailing peace and security in the region vs instability in the Maghreb region Renewed UN and donor interest for The Gambia	Lack of access to finance, cost of borrowing and tenure of facilities Cost and access to energy Increasing effectiveness of competitors Instability of international tourism Weak image of African destinations Forestry and environmental degradation – deforestation Entrance into the market economy and increasing level of consumerism leading to rapid changes in the social fabric

KEY SUCCESS FACTORS

For this roadmap to have maximum impact and to achieve all goals that were set, a number of key success factors need to be in place. These are:

- Political and leadership: The government needs to have a tourism policy to guide the development and diversification of the tourism sector. It is difficult to record progress in the absence of clear milestones set in such a policy.
- Sociocultural: This encompasses the language barriers in the population that might prevent basic understanding of tourism sector concepts.
- Infrastructure: The success of tourism, especially in rural areas, greatly depends on good infrastructure that enables access to these areas.
- Education and skills: This mostly refers to the human capacity to understand and manage tourists.
- Security and safety: This refers to the overall safety conditions in the country and the freedom from danger to attract tourists to the country.
- Legal and regulatory: This refers to the regulations in place in the country that need to provide sufficient space for the sector to develop, while ensuring the quality of the services provided.

MARKET TRENDS AND OPPORTUNITIES IN THE TOURISM SECTOR

For the last two years, The Gambia has faced a period of political instability and a serious epidemic outbreaks in the subregion, which have severely and negatively impacted the volume of international visitor arrivals. Notwithstanding these dramatic events, (i) The Gambia remains relatively unknown as a potential tourist destination for most international travellers; and (ii) the quality of tourist infrastructures and services, especially in the countryside, is below what international tourists, and more particularly international tour operators, can expect to visit or to sell as a destination.

Overall, The Gambia is mostly perceived as a low-cost seaside destination providing mainly all-inclusive offers. This positioning only allows low profit, rendering low investments in facilities, which translates into limited quality service delivery. This in turn limits the sector's ability to attract higher-yield international visitors and thus constrains the sector's development growth. This roadmap proposes to engage in a parallel positioning without breaking away from the current offer and identifies ways to increase the benefits to the local communities, especially youth in the rural areas.

Indeed, the richness of natural and cultural assets could quickly make The Gambian countryside become an attractive destination for potential visitors. The upper river needs to create its own identity rather than just being an option for the most adventurous. In order to attract more tourists, and, therefore, to create jobs and opportunities for the youth, the countryside needs an upgrade of its infrastructures such as its services (hotels, restaurants, transportation and guiding, etc.), plus the access to local goods must be improved for the tourism stakeholders (backward linkages) and new creative tourism activities shaped with local communities.

This section details the tourism market trends in community-based tourism and assesses levels of potential market demand for new kinds of experiences among tourists who are already visiting The Gambia. The section also identifies opportunities for the countryside using the results of ITC market research on community-based tourism development in the Central River Division of the Republic of The Gambia, prepared by Peter Richards between October 2017 and March 2018.

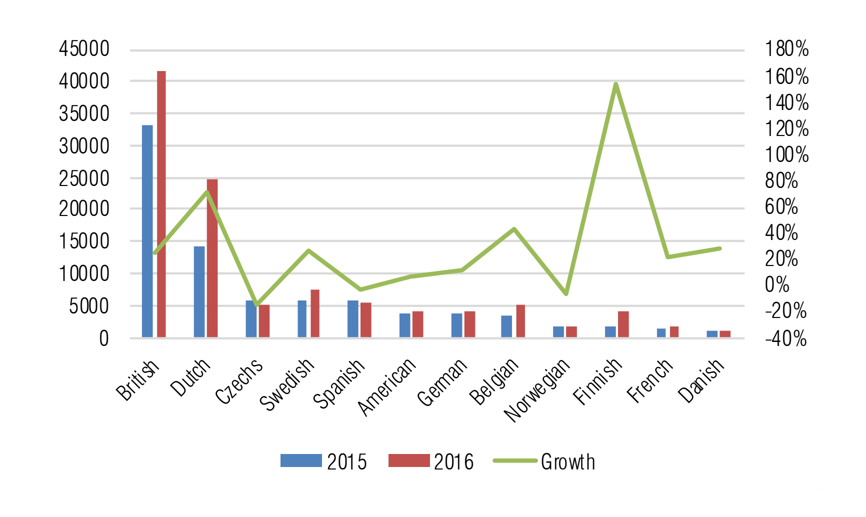
KEYS MARKET TRENDS IN THE GAMBIA, EUROPEAN MARKET AND COMMUNITY-BASED TOURISM IN WESTERN AFRICA

Overview of latest tourist arrival trends in The Gambia

In 2016, a total of 161,127 visitors flew into The Gambia, compared to 134,560 in 2015, representing a 20% increase. This is also the second-highest arrival number in the history of tourism in The Gambia (GTB, idem). All major source markets, barring the Kingdom of Norway and Spain, grew sharply compared to 2015. Top markets were British (44%), Dutch (26%), Swedish (8%), Spanish (6%), Belgian (5%), German (4%), Norwegian (4%), Finnish (4%) and Danish (1%).

As shown in figure 16, arrivals from most major source markets registered growth in 2016. Finland has registered the highest increase between 2015 and 2016, followed by the Netherlands, Sweden and the United Kingdom. In contrast, Norway and Spain registered declines of –6% and –3% respectively (GTB, 2017).

Figure 17: Arrivals from traditional markets in 2015 and 2016



Source: GTB, 2017.

According to research conducted by the GTB (2017), the main motivations for traveling to The Gambia were climate, sea and beach (61%), followed by people and culture (29%). Forty-two per cent of tourists had other destinations in mind before choosing The Gambia, with Cape Verde, the Arab Republic of Egypt, Canary Islands and the Kingdom of Thailand topping the list. Most tourists (95%) who visited The Gambia were satisfied and most (94%) would recommend The Gambia.

In 2016, the Czechs were the highest spenders, followed by the Dutch, Belgians, Finnish and British. Most expenditure was on food and drinks, followed by tours and souvenirs. Average spend per day was 1,833 Dalasi (approximately $38–€30).

Nationalities spending 14 days in The Gambia in 2016 were British (33%), Dutch (17%) and Gambians (14%). More than 50% of British (53%), Finnish (61%), and Italian (60%) tourists stayed for at least 14 days. Upriver trips take at least two days. New offers for upriver activities should try to increase the number of days and focus on visitors who spend longer in The Gambia.

In 2016, 73% of visitors to The Gambia were older than 40 years old. There is a general need to successfully attract younger travellers (GTB, 2016). The year 2016 saw growth in student travel, which is an opportunity for The Gambia.

- When analysing these tourism statistics, it is important to keep in mind that, although tourism is an important economic sector in The Gambia, the actual number of international visitors arriving in The Gambia is low (much less than 200,000). Great care needs to be taken when planning tourism development and raising expectations in more remote parts of the country. According to various estimates, between 5% and 10% of visitors make a trip up-country, away from the coast (currently, the estimation is between 8,000 and 16,000 people). Attracting a higher market share of tourists away from Banjul and the coast to travel upriver will only bring significant impacts if the overall number of tourists to The Gambia increases. Product development and marketing need to be very bold, creative and inspired to succeed.

Demand for local experiences in target European markets

As the sector needs to consider developing new types of tourism services to diversify its offer and attract more free independent travellers (FIT), it is important to assess levels of potential market demand for new kinds of experiences.

European markets are the most important markets for The Gambia, in particular Britain, the Netherlands and Belgium, and Scandinavian countries. During the past decade, the development of European tourism trends suggest increasing opportunities for destinations that can offer safe, enjoyable, distinctive local experiences.

European tourism trends that offer immediate opportunities for The Gambia with current markets include:

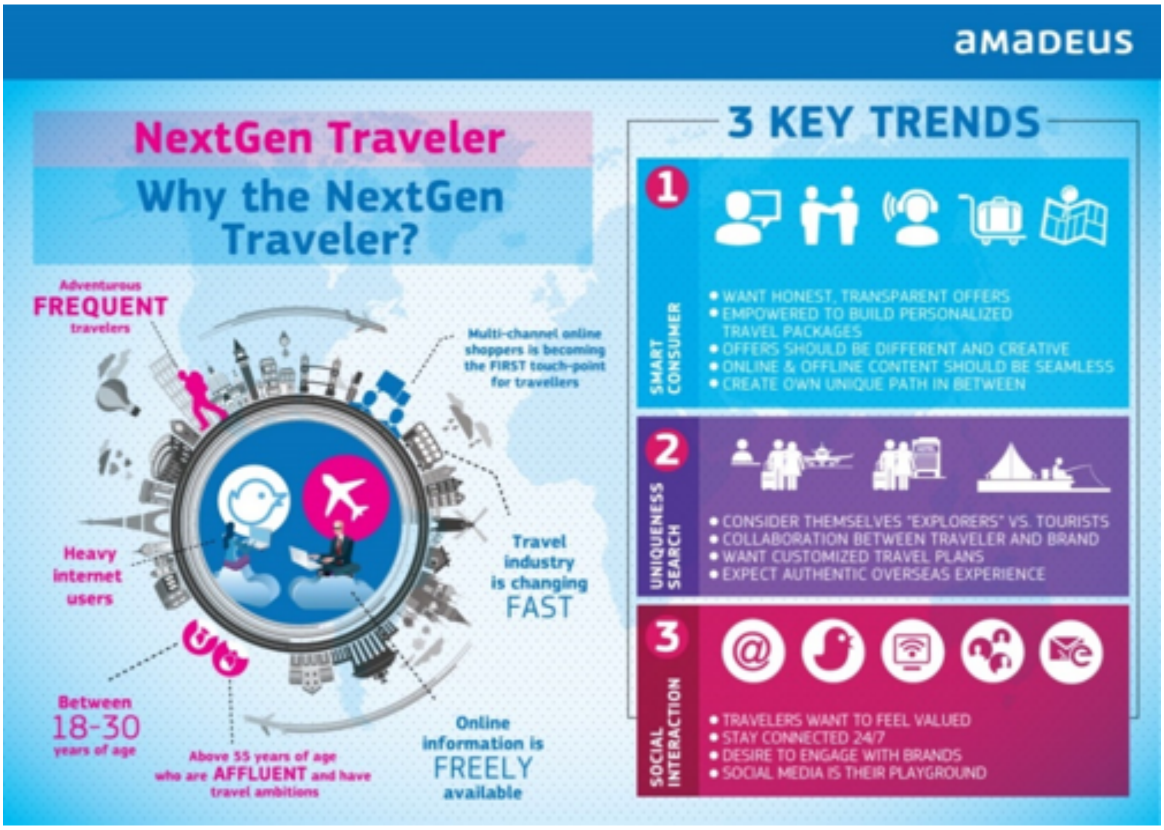
- Increasing importance of tours and activities as a motivator for destination choices Association of British Travel Agents (ABTA), 2017; Lonely Planet, 2017; Skift, 2017). The quality of tours is increasingly a decision breaker. Nevertheless, price pressure remains a significant limitation for inclusion in current winter sun excursion packages;
- Demand for local, authentic experiences and interaction with local community members (ABTA, 2017; Centre for the Promotion of Imports (CBI), 2016; Forbes, 2017; ITB, 2017). '*Brands want to become experience platforms.*' (Skift, 2018);

- Demand for culinary tours (CBI; Skift). There are untapped opportunities for new food and cooking experiences in British and Dutch markets, including offering more unique local food experiences. However, in mainstream markets, health and safety (H&S) standards remain obstacles for SMEs and local communities;
- Increasing importance of sustainability and having a positive impact (ABTA, 2017/18; ATTA, 2018; CBI, 2016; Lonely Planet, 2017), including tours to promote cross-cultural understanding (CREST, 2017). Major tour operators such as TUI and Thomas Cook are expected to operate sustainably. In practice, maximum added (price) value can only be added to highly visible, eye-catching showcase products.

Other trends that represent an opportunity for The Gambia in alternative or growing markets include:

- Increased demand for adventure travel, community-based tourism (CBT), cultural tourism and nature-based tourism (CBI, 2016). Success depends on persuading additional small group adventure (SGA) tour operators to sell tours to West Africa and The Gambia. Currently, most of the major SGA tour operators *do not* operate tours in The Gambia (e.g. Intrepid Travel and G Adventures). Experience in other destinations (e.g. Thailand) suggests that, in order to optimize market penetration, soft adventure activities should be developed alongside pure, cross-cultural and CBT experiences;
- Demand for educational study tours, by schools, universities and special interest clubs (CBI, 2016);
- Demand for tailor-made travel for families with older children (CBI, 2016; GTB, 2016);
- The rise of the ‘millennials’ as a target market (people born between 1980 and 2000), among whom it is common to value experience more than ownership (c.f. CBI, 2015; Forbes, 2017; ITB, 2017; Skift, 2017; *National Geographic*, 2017). For The Gambia to benefit from this trend, it requires repositioning in European markets. The Gambia focuses on older travellers (GTB, 2017). The roadmap recommends penetrating this younger market and developing a new brand covering upriver to the sea, targeting this new younger market segment and taking into account the needs of the ‘new generation traveller’ as described in figure 17.

Figure 18: Five innovations transforming the travel industry



Source: World Economic Forum – innovations transforming the travel industry (https:/ /www.weforum.org/agenda/2015/09/5-innovations-transforming-the-travel-industry/).

Other trends that represent a longer-term opportunity for The Gambia in new or growing markets include:

- Demand for 'blended experiences', including bleisure (business plus leisure) (Forbes, 2017) and Boutique MICE programmes, which include a mix of business, wellness and local experiences (CIT, 2017);
- Growth in senior, disabled, solo and LGBT travellers (CBI, 2016).

The trends and opportunities listed above must be understood alongside trends that could be threats:

- Safety and security, including perceived threats of terrorism (ABTA, 2017; ITB, 2017). '*Geopolitical instability does not deter European travellers, but it influences their choice of destination.*' (CBI, 2016);
- Demand by tour operators for exclusivity (CBI, 2016);
- Increasing use of online research, alongside subsequent demand for a professional online presence and more seamless booking experiences facilitated by mobile technology (ABTA, 2017; CBI, 2016);
- Economic worries are still causing UK travellers to be price sensitive (ABTA, 2018);
- Low-cost long-haul, which may have a negative impact on demand for The Gambia (ABTA, 2018).

Key tourism market trends for community-based tourism in Western Africa

Globally, international tourist arrivals grew by 7% in 2017, representing the strongest results in seven years, with growth expected to continue in 2018 at a rate of 4%–5% (UNWTO, 2018). Africa consolidated its 2016 rebound with an 8% increase in growth, welcoming a record 62 million international arrivals. This rate was equal to Europe and ahead of Asia Pacific (6%), the Middle East (5%) and the Americas (3%). In Sub-Saharan Africa, arrivals increased by an impressive 5% (UNWTO World Tourism Barometer, 2018). Nevertheless, Sub-Saharan Africa remains, overall, the region where travel and tourism competitiveness is the least developed. Although performance has increased, it has improved less compared to other parts of the world. Southern Africa remains the strongest subregion, followed by Eastern and then Western Africa (weforum.org, 2017). There is still low attractiveness for West Africa as a destination for international tourism (African Development Bank, 2017).

Tourism trends in Africa identified by the ITC team at the tourism trade fair World Travel Market (WTM) Africa 2017 could represent opportunities for community-based tours in The Gambia, including beach tourism, ecotourism and cultural tourism. Other trends that could represent opportunities for CBT in The Gambia include the sharing economy gaining traction (e.g. Airbnb), travel players implanting multichannel approaches (online), growing competition between low-cost carriers and scheduled airlines (which could make it cheaper and easier for FITs to book flights only and use local accommodation), and the expansion and development of luxury resorts and hotels, which could improve market access of well-located CBT tour programmes to well-educated tourists with higher disposable income.

According to the Weforum.org Travel and Tourism Competitiveness Report 2017, the conditions needed to grow tourism in Sub-Saharan Africa include the expansion of an African middle class, improved transport infrastructure and air connectivity, and easing regulations to make it easier for low-cost airlines to operate. Finally, the report notes the need to improve natural and cultural resource conservation and management.

According to the African Development Bank (AFDB), West African countries could rely on two major source markets. The first is that of the northern countries, particularly in Europe, with which non-tourist exchanges are already firmly established (airline agreements, trade and diaspora). The second is the south-south market of West Africa, which is growing thanks to the emergence of the upper-middle classes in the region. In Ghana, for example, more than one-third of international tourists come from the Economic Community of West African States (ECOWAS) zone. This regional market could be organized based on the logic of complementarity rather than competition. The large and growing market of the Federal Republic of Nigeria could be the powerhouse of the system, with each country adding its specific and complementary tourist offer to the benefit of the region as a whole.

- One strategy to draw new markets to The Gambia would be to evolve competition into cooperation between Western African destinations by creating regional, multi-country routes. There is some interest to visit multiple West African countries connected by the slave trade, for example, among diaspora in the United States (cf. United States Department of Commerce, 2017). CBI (2016) noted the European Union (EU) demand for cultural tours to historic sites. It might be possible to develop themed routes that include community-based experiences via networks, marketing linkages and route development between West African countries. However, realistically, the potential of a West African regional brand to stimulate demand for CBT in The Gambia is very low. Senegal-Gambia combination tours are quite common. However, tourists to The Gambia aren't 'thinking regionally' of West Africa as a destination. Insecurity prevents West Africa from developing the kind of 'must do' overland routes that exist, for example, in South-East Asia. The Gambia is competing directly for beach and cultural tourists with other West African countries (e.g. Cape Verde and the Republic of Ghana). However, main competitors are defined by demand for winter sun and sea, rather than demand to combine West African experiences. Forty-two per cent of tourists had other destinations in mind before choosing The Gambia, of which countries as diverse as Cape Verde, Egypt, the Canary Islands and the Kingdom of Thailand topped the list (GTB, 2016).

Interviews with tour operators during ITC market research showed that West Africa is still not an important destination for specialist cultural and adventure tour operators. The United Kingdom specialist tour operator EXPLORE does visit The Gambia. The company Dragoman also offers a bus trip through West Africa, which briefly passes through The Gambia. However, other small group adventure (SGA) industry leaders do not offer trips to The Gambia. The Gambia is promoted as a good choice for first-time travellers in Africa. Much more could be done to promote The Gambia as a gateway to Africa.

- It may be possible to attract additional SGA specialists to The Gambia by studying trends identified in the previous section, and designing highly unique products and experiences that meet a combination of identified market needs. A notable challenge is the abundant online references to the sex industry (Cf. Euromonitor, 2014). This is an obstacle to moving into a distinctive, credible and responsible tourism brand.

DEMAND FOR LOCAL EXPERIENCES AMONG TOURISTS WHO ARE ALREADY VISITING THE GAMBIA

Limited research exists on the motivations and preferences of tourists who visit The Gambia. However, work that has been undertaken does offer hope about market potential for the development of authentic, local experiences. In 2016, people and culture was identified as the second-highest motivator for tourists surveyed by the GTB (29%). Research by Thorne (2011) concluded that '*there is demonstrable demand among package tourists in The Gambia for intangible cultural heritage excursions*'. Importantly, this interest was not limited to alternative markets. Travellers booking through mainstream tour operators would also '*like more opportunities to explore the intangible cultural heritage of the destination*' (Thone, 2011, p. 41). The success of individual businesses offering high-quality services combining comfort and local experiences confirms that some demand exists, for example, the Sandele Eco Retreat and the Mandina River Lodges. However, optimism must be balanced against the fact that, at the moment, most evidence points towards the vast majority of tourists – and almost all of the tourists booking tours through tour operators – being price sensitive.

A further insight, which is highly relevant when assessing opportunities for offering authentic experiences through mainstream tour operator supply chains, is tourists' suspicion of buying such products from tour operators. Thorne (2011) classified four types of interaction: passive, commercial, charitable and hospitable. In the hospitable interaction, Gambians are viewed as hosts and tourists as guests. However, in the commercial interaction where tourists are 'sold to', their interaction is characterized as reluctant purchaser.

- The implication of this is that the experiential and ethical credentials of a good community-based experience needs to be clear and outstanding to be able to add real value to perceived commercial transactions.

Product and service delivery issues affecting the potential success of up-country excursions

The GTB highlighted that Gambian tourist products are '*seen by our high ration repeater tourists as old and tired*' and '*marketing cannot be effective without [new] products'.* McCombes and Woodward emphasize that demand from tour operators and ground tour operators depends on delivery to '*appropriate standards and an appropriate price for the existing markets*' (2014, p. 32). Bah and Goodwin (2003, p. 24) emphasize the importance of being able to meet tour operators' health and safety requirements. Reoccurring issues that reduce tourist satisfaction and need to be managed in hubs (e.g. Janjanbureh) and local communities include:

- Poor-quality hotel facilities and hotel services;
- Poor waste management, with litter visible on roadsides and beaches, etc.;
- Unprofessional tour guides and hassle by bumsters.

OPPORTUNITIES IN ALTERNATIVE MARKET SEGMENTS AND DISTRIBUTION CHANNELS

The Gambia Tourism Market Study, conducted by The Gambia Competition and Consumer Protection Commission (GCCPC, 2014) found that exclusivity contracts used by some tour operators and hotels are anti-competitive and actively undermine sustainability: 'International Tour Operators' (ITO) immense bargaining power forces hotels and small and medium-sized tourist enterprises (SMTEs) to reduce their prices, sometimes to the extent of incurring losses, reducing their ability to renovate their facilities and maintain the quality of services required for them to compete internationally.' Opportunities for tour operators selling winter sun holidays in The Gambia to improve conditions are limited by the highly competitive market environments in which they operate.

Under these circumstances, it is very difficult for hotels to survive and prosper. Hoteliers make great efforts to maximize tourists' spend inside their premises, and 'some hotels are alleged of going to extreme lengths to prevent guests using the services of SMTEs' (GCCPC). This is a serious threat to the success of new CBT tours.

Source: ITC

A more prosperous and sustainable Gambian tourism industry requires new channels to new markets. While it might be possible to include new excursions in established mainstream tour operators' itineraries or optional excursion programmes, efforts must be made to raise capacity to access alternative distribution channels.

- The GTB (2016) noted the increase in demand for student and educational programmes. Promoting student and educational trips is one good option to increase visitation, including in the low season. Inside The Gambia, McCombes and Woodward (2014, p. 4) recommend engaging with smaller Class B tour operators. Capacity building for Class B tour operators to design and operate high-quality educational programmes* alongside targeted promotion to specialist tour operators and international school networks could help to grow educational markets. However, during the market research, the issue of malaria was raised as a key obstacle. It will also be important to try to attract additional SGA tour operators to The Gambia.
- Other campaigns could be directed at special interest clubs, societies and groups. Being able to travel to such a different environment, without experiencing jet lag, is a huge advantage for The Gambia. A campaign aimed at kayaking, camping, birdwatching, cooking, art and music enthusiasts through clubs may yield good results.

Foreign investors' lack of confidence in legal protection

It is notable that several of the most successful alternative product offers to high-end markets have been pioneered by international investors with a passion for ecotourism (e.g. Sandele Eco Retreat and Mandina River Lodges). Foreign and domestic private entities have a right to own business enterprises and engage in remuneration activities in all fields that are deemed lawful economic activities in The Gambia. There are no laws or practices that discriminate against foreign investors. Nevertheless, The Gambia is not considered to be a very attractive place for many private or foreign investors, as illustrated by the World Bank Doing Business 2018 report for The Gambia, where it was ranked 146th out of 190 economies in terms of its overall Ease of Doing Business. While conducting the market research, several stories were reported of foreign investors feeling vulnerable and lacking confidence in legal protection in the case of business disputes.

OPPORTUNITIES IN ALTERNATIVE PRODUCTS: RIVER CRUISES AND THE NINKI NANKA TRAIL

Several research papers and articles have specifically noted the potential of tourism in upriver Gambia. For example: 'An area of opportunity is the niche market of ecotourism. The river that bisects the country (River Gambia) provides opportunities for commercial hubs along its banks. River transport, especially as part of tourism, presents likely business opportunities. The River Gambia is highly navigable for a major portion of its course, but is not used by any transport service for goods and services.' (Source: Untied States Department of Commerce*)*

There is potential to craft better experiences and more local benefits from natural and cultural attractions, small towns and villages located along the riverbank. Existing boat trip and river cruise operations include:

- Short boat trips included into longer, multiple-day excursions (e.g. by Gambia Tours);
- Multiple-day trips operated by Gambia River Excursions (GRE), an ASSERT Ecotourism Enterprise Award winner. The company owns seven boats, including three quite large boats. The company EXPLORE uses GRE's boats to operate their Senegal and Gambia River Cruise;
- A small number of upmarket river cruises are also being advertised online (e.g.: Alpha Yachting);
- Peregrine Adventures are also offering a programme to The Gambia, including a boat journey.

One of the most ambitious products developed in past years is the Ninki Nanka trail. This extended five-day river excursion is a '*3–4-star product aimed at satisfying tour operators and ground handlers for existing markets in The Gambia*' (McCombes and Woodward, 2014). Three target markets have been identified:

- Firstly, high-end, affluent, mature (30s–60s age range) British, Spanish, Scandinavian, Dutch and German package tourists who are educated, well-travelled, environmentally aware and interested in local culture and nature and unique, authentic experiences;
- Secondly, independent and alternative tourists interested in travelling in Africa, who have similar characteristics to the target package tourists above, but who may not be travelling in the same way;
- Thirdly, tourists who could have a special interest and a strong commitment to responsible and sustainable tourism. This group may book the Ninki Nanka Trail as a standalone product and not part of a package.

The Ninki Nanka Trail has been under development for several years, through an informal partnership between the MSc Responsible Tourism Management Team at Leeds Beckett University, Camp Africa, Institute of Travel and Tourism of The Gambia (ITTOG), International Centre for Responsible Tourism West Africa (ICRT), ASSERT and The Gambia Tourism Board (GTB).

- The status of the Ninki Nanka Trail lies somewhere between an innovative, alternative tourism route along The Gambia River, packaged under the Ninki Nanka Trail brand and a niche, educational tourism product, which is being sold from time to time by Leeds Beckett University. Several pilot tours have taken place to test the trail and a solid itinerary has been agreed on.

Box 1: Ninki Nanka Trail itinerary upriver

The Ninki Nanka Trail starts with a Hidden Banjul walking tour, before visiting destinations and attractions such as Ndemban, Kunta Kinteh Island, Juffureh, Tendaba, Farafenni, Njaw, Kuntuar and Janjanbureh. A range of cultural and community-based activities are visited along the trail. These give visitors the chance to learn about the history of the slave trade, and to join hands-on activities, including dance, batik, cooking, farming, soap making, market tours, NGO project visits and wildlife watching.

Source: http://ninkinankatrail.co.uk/.

Source: ITC

- The Ninki Nanka Trail is a creative concept with the potential to combine an excellent local experience with social impact. In terms of achieving skills, jobs and income at scale, a key challenge is to identify a product and market model with enough wow factors to attract sufficient visitors to make a significant impact.

The idea is for the Ninki Nanka Trail to be branded as a destination connecting the villages and experiences on offer that all tour operators can use in order to increase the market access and benefits for the communities and Gambian tourism offer. However, it is important that measures are put in place that ensure that only those tour operators that adhere to a strict code of conduct can use the brand. This would be in terms of responsible payment for services and products, contributing to village development funds, proper disposal of waste, managing visitor behaviour, use of local guides and responsible giving, etc. This code of conduct could also be supplemented by supporting tour operators to work towards achieving a sustainability certification for their business practices, such as Travelife or Fair Trade Tourism. Currently, tour operators are free to visit the places along the Ninki Nanka Trail with hardly any regulation. The creation of a destination brand using the Ninki Nanka Trail requires careful design of the development and promotion of the business model for meeting the requirements of the code of conduct and the brand. The development of the Ninki Nanka Trail also requires supporting communities on the trail to improve and formalize their services and products and how they are paid for to make their offer more attractive to the tour operators (source: ITC interview with Lucy McCombes).

Additionally, in order to become a brand and a marketable, experiential tourism product, the Ninki Nanka Trail stakeholders have to identify which business model is the most appropriate to develop the partnership and pilot trips into a sustainable and feasible enterprise. Various options exist and examples from other countries using social enterprise business model (as described in box 2) could present interesting opportunities to ensure a clear benefit to the communities.

Box 2: Using the tourism social enterprise model to develop the Ninki Nanka Trail

This roadmap focuses on youth employment opportunities by developing youth skills and responsible tourism, alongside the need to develop highly innovative products in The Gambia. To achieve this, social enterprise models from South-East Asia offer interesting directions. In South-East Asia, it is quite common to establish social enterprise restaurants, staffed by underprivileged youth. The youth develop new skills and job opportunities through rigorous training provided in the restaurants. They are able to 'graduate' after one or two years and find well-paid work in hotels and restaurants. Meanwhile, their powerful story becomes a core part of the product and experience being offered to tourists. This model could be powerful enough to overcome tourists' suspicion of buying authentic products from tour operators. Two well-known and commercially successful examples are Romdeng in the Kingdom of Cambodia and Koto in Hanoi, the Socialist Republic of Viet Nam.

The Ninki Nanka Trail could apply this model if partners agree to conceptualize the trail boat as an on-the-job training school. Some training for youth would be provided on board, and some by national and international partners. Tourists would buy the Ninki Nanka Trail product knowing that they are contributing towards this good cause. This experience would offer tourists the chance to feel that they can make a small, but important contribution towards reducing migration and helping youth. It could also be possible to link this idea with the GHTI's innovative Young Chef of the Year competition.

Figure 19: Romdeng social entreprise youth training restaurant, Phnom Penh, Cambodia

Figure 20: Koto social enterprise youth training restaurant, Hanoi, Viet Nam

The table below presents a summary of the key product development ideas identified in the roadmap.

Product	Short description
1) Community-based tours in new destination	• Based on market research, the highest potential for a CBT programme is an activity where visitors have the chance to learn a traditional Gambian dance. This could include interpretation by local guides about when such a dance usually takes place, the roles of men and women and so on, and the villagers teach the visitors how to do it. • Another significant opportunity is a food experience, where visitors have the chance to learn to cook a local dish. However, there will be more obstacles due to the health and safety requirements of tour operators. It is important to identify a culturally meaningful dish, which tourists can learn to make and that is relatively easy to prepare hygienically (e.g. no meat in the ingredients).
2) Educational study programme	• This involves building the capacity of Gambian specialist tour operators, perhaps working in partnership with educational institutes, to design learning journeys that can meet the specific curriculum goals of schools, universities and societies. By nature, educational programmes are tailor-made. Tour operators are successful at offering educational programmes when they understand how to assess the specific learning objectives of a client, and are able to identify and select the right places, people and experiences to enable the students to reach the learning goals.
3) Develop the Ninki Nanka Trail into a sustainable business model and destination branding	• As it stands, the Ninki Nanka Trail is an interesting and attractive idea. However, the idea of an extended river excursion still lacks a sufficiently big wow factor to be innovative enough to expand the market rather than just taking market share. • The Ninki Nanka Trail could be made more exciting, generate more income and create more impact using a social enterprise business model. Gambian youth trainees should be trained on CBT and partners to provide high-quality tourist services along the river. For example, food and beverages, sharing artistic performances and facilitating cross-cultural exchange in the villages along the Ninki Nanka Trail. The youth will add credibility to the responsible tourism proposition, improving the tourist experience. • Concretely, this could be funded through a joint investment between tour operators (in cash), Gambian educational providers (in cash or kind) and local communities (in kind). The model would have more impact if a promotion campaign is carried out in target markets focusing beyond the typical Gambian tourist. This model would probably have the most market potential in UK and Dutch markets. • The boat should be distinctive from low-budget river trips: upmarket and comfortable. Accommodation could be on board or ‘glamping’ by the river side from one village to the next. • Part of the cost of the trip could be to raise sponsorship or make a donation. These funds would then be used to implement training during the low season, to raise standards of community, local family business and SME products and services. The host for the overall management of the project would need to be identified.
4) Tours from the river to the sea, for writers and artists	• The research showed that there is demand and potential for bespoke trips for international writers, poets, artists and musicians to travel along The Gambia River. This is especially true of diaspora communities, many of whom would also like to give something back to The Gambia. This could be achieved by organizing trips where diaspora artists can mentor local Gambian youth artists. If such tours were integrated with the Ninki Nanka Trail social enterprise model above, it could provide excellent stories for promotion of the Ninki Nanka Trail. If these tours travelled from the river to the sea, it would offer excellent opportunities for creative exploration of the county’s diversity through poetry, painting and music, etc.
5) Experience and service quality improvement on the Ninki Nanka Trail	• Due to low numbers of tourists, resources should not only be used to develop new products. This roadmap spreads risk by gradually building up the quality and diversity of experiences along the Ninki Nanka Trail. Resources would be invested in improving the service delivery and experience quality at key destinations along The Gambia River that are already established and welcoming tourists. This includes ad hoc training based on the most serious needs, such as tour guide training, food hygiene and menu development, waste management and improving hospitality services. This will be supported by a national rebranding and management of new destinations upriver.
Key training should also include:	
• Tour guide training in service and interpretation for different target markets; • Meeting tour operators’ health and safety criteria (hotels and restaurants); • Menu development and food hygiene training at a simple level (for CBT); • Maintenance skills for hotels and restaurants (plumbing and electrics, etc.).	

MARKET STRATEGY FOR KEY PRODUCTS, TARGET MARKET AND MARKET ACCESS PARTNERSHIPS

Due to limited and uncertain demand, product development upriver must balance risk through a combination of innovation (new products) and improving existing experiences that are already able to attract tourists. Overall, the roadmap has identified opportunities to diversify products and markets by: i) developing a small number of new, community-based tours; ii) raising capacity to design and promote educational and study programmes; iii) developing the Ninki Nanka Trail into a showcase social enterprise model with enough wow factor to attract new markets to The Gambia; iv) deliver tailored and specific interventions at existing tourism destinations along The Gambia River to improve upriver services and experiences; and v) work to develop new river programmes for artists, writers and musicians, including mentoring young Gambian artists.

Specifically in terms of CBT development, interventions will be twofold: on one side, the roadmap aims to reinforce the existing community-based tourism initiatives close to Banjul, for instance in Giyorrom and Gallo Ya, and simultaneously develop new CBT in new destinations upriver, such as in Janjanbureh area.

Source: ITC

The roadmap's overall market strategy is to develop new markets, including FITs interested in culture, students and youth travellers, SGA tourists traveling with specialist tour operators (such as EXPLORE, Intrepid (PEAK), G Adventures, Exodus, Sawadee Reizen and Hauser Exkursionen), students and researchers at international schools and universities, clubs and societies with an interest in local culture, birdwatching, art and music, and the history of the slave trade, Gambian diaspora and expats in The Gambia and West Africa. Global social enterprise networks can be a market for a new Ninki Nanka Trail youth training model. This requires building the capacity for Class B tour operators to design and operate high-quality educational programmes and work effectively with local community guides to deliver great CBT experiences.

- The roadmap recommends focusing on the niche market within traditional existing winter sun markets, who are highly interested in upriver travel. Focus on Dutch, British, German and Scandinavian tourists between 30 and 60 years old by developing joint marketing activities between Class A ground handlers and The Gambia Tourism Board.
- The roadmap puts forward the need to create a collaboration platform with outbound tour operators in order to develop new packages for their customers. The Ninki Nanka Trail destination branding could be used to formalize alliances between local public and private stakeholders, and outbound tour operators. This approach will allow tourism to be handled in a more inclusive manner, which means to foster the tourism industry's potential to contribute to development and poverty reduction by enhancing the linkages between the youth living in adjacent tourism destinations and the tourism sector.
- The roadmap envisions the development of a new branding at the national level to successfully attract the identified new target markets. This brand should be inclusive of the current sea and sun offer, and build on current national branding of friendly and welcoming people. However, the brand should also encompass the attractions of upriver Gambia. The brand should be suitable for targeting a younger demographic. 'Go with the flow in The Gambia' is recommended as a starting point for this rebranding.

Table 2 presents the key strategies for product–market matching and market access partnerships.

Table 2: Key strategies for product-market matching and market access partnerships

Product	Market	Channel, partner or promotion
CBT tours CBT initiatives close to Banjul. Efforts should focus on nearby existing CBT initiatives such as Giyorrom and Gallo Ya In new destination upriver such as Janjanbureh area	Young, independent travellers	• Travel hubs (e.g. I Like Local); a website and Facebook page in English; social media campaigns.
	Middle-aged independent travellers	• As above, plus media campaign in traditional, high-quality media.
	Small group adventure (SGA) travellers (e.g. tour operators such as EXPLORE, Intrepid (Peak), G Adventures, Exodus, Sawadee Reizen and Hauser Exkursionen)	• A promotional campaign towards SGA tour operators that organize trips to Africa, but do not visit The Gambia. Plus, facilitating marketing linkages with specialist Gambian tour operators.
	Niche of traditional, winter sun markets interested in upriver travel. Focus on Dutch, British, German and Scandinavian tourists	• Engagement and promotion of new tours to existing tour operators and ground agents. E.g. TUI, Thomas Cook, and Gambia Tours.
	Expats in The Gambia and West Africa	• Social media sites, newspaper articles and in-flight magazines. Approach international companies, embassies, schools, clubs and associations.
Educational study programmes	Gambia training institutes	• Development partners could include Gambian educational providers such as GTHI and ITTOG, etc.).
	International schools	• Specialist tour operators in The Gambia and Europe, international school associations, and direct mail contact with school principals through websites.
	International universities	• Specialist tour operators in The Gambia and Europe; university networks and associations. Direct contact with faculty, with tailored proposals based on curricula. • Promote at trade fairs and consider targeted roadshows to penetrate niche markets.
	Clubs, groups and societies	• Specialist tour operators in The Gambia and Europe; special interest associations. • Direct mail contact with clubs and societies, with tailored proposals depending on their interests. • Promote at trade fairs and consider targeted roadshows to penetrate niche markets.
	Diaspora with interest in the history of the slave trade in West Africa	• Diaspora networks and associations. • Historical societies and networks.
Ninki Nanka Trail	British and Dutch between 30 and 60 years old	• Partnership with a popular celebrity – e.g. celebrity chef.
	Small group adventure travellers	• SGA tour operators (as above).
	Social enterprise networks	• Research and link through online forums; snowball contacting.
Tours for writers and artists	Gambian diaspora writers, artists	• Diaspora networks; Kadija George.
	British artists, writers and poets	• Art clubs and societies.
	Expats in West Africa and Africa	• Chambers of commerce, networks, clubs and associations.
Upgraded upriver experiences	Niche of traditional, winter sun markets interested in upriver travel. E.g. Dutch, British, German and Scandinavian tourists	• Engagement and promotion of new tours to existing tour operators and ground agents. E.g. TUI, Thomas Cook and Gambia Tours.

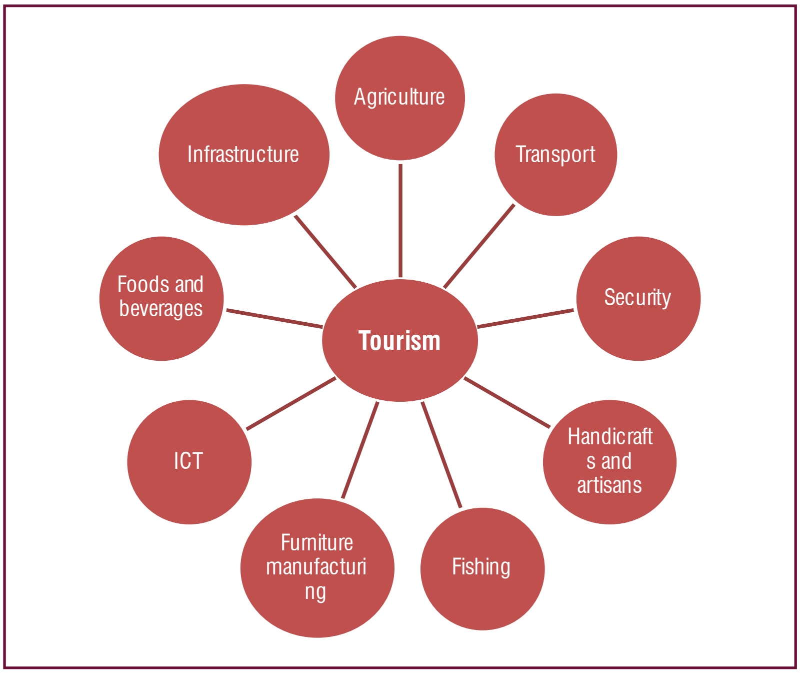
YOUTH EMPLOYMENT OPPORTUNITIES IN THE TOURISM SECTOR

The tourism sector represents an important potential employment market for youth, if the required adjustments are done to improve the sector and capture the opportunities identified previously.

There are three possibilities for youth to enter the tourism sector workforce:

- Employment with the major tourism service providers: Tourism is a labour-intensive sector, requiring both unskilled and skilled workers, making it a well-suited entry point for young people. In addition, there is a wide pallet of job areas possible, comprised of more classical areas such as accommodation and restauration, but also of services areas such as tour guides, tour operators and tourism-related service providers (wellness, health, boating and snorkelling, etc.).
- Becoming an entrepreneur: The other major area of possibility is to start a small business linked with tourism. This offers great potential for youth, as it allows new ideas to be brought in and fosters overall sector diversification. Areas of opportunities range from classical offers to more niche products and services, such as ecotourism, informal accommodation sharing, beach restaurants and bars, recreational activities for children, water and adventure sports, fishing and biking.
- Integrating tourism-connected sectors: The development of backward and forward linkages (as illustrated in figure 20) in the tourism sector will allow young entrepreneurs to develop small businesses in a variety of areas:
  - » Agriculture: Provision of fresh and local produce to the accommodation and restauration sectors.
  - » Transport: Boating or car transportation (both car hire and taxi).
  - » Security: Provision of security to tourists wishing to explore more remote regions.
  - » Handicraft: Manufacturing of souvenirs, handicrafts and objects related to landmarks.
  - » Fishing: Provision of fresh fish produce to all beach hotels and restaurants.
  - » Furniture manufacturing: Supply of local furniture design to hotels and restaurants.
  - » ICT: Provision of internal client management systems to hotels and restaurants, web marketing and booking services to tour operators.
  - » Food and beverages: Development of restaurants and delivery of processed or semi-processed local produce.
  - » Infrastructure: Development of roads and construction of new establishments.

Figure 21: Backward linkages possibilities in the tourism sector



Source: ITC.

DEVELOPING YOUTH SKILLS TO IMPROVE AND DIVERSIFY TOURISM SERVICES AND PRODUCTS

After having mapped out the training providers in the tourism sector and assessing the skills gap based on the results of the SMEC survey (see 'Occupational skills gap at the sector level'), it was essential to present the results to the private sector and its experience in finding qualified candidates in specific positions that they require. During the sector consultations in June 2017 and then in the following sector core team meetings, new assessments were carried out for a list of typical tourism occupations to further identify the issues encountered during the recruitment, to list the training institutes currently providing the required education, and, finally, the type of training needed to improve the competency level.

The main occupations for which firms encounter difficulties filling positions or finding competent staff are the following, by level of qualification required to fill these positions:

In the hospitality services:
- Cooks
- Housekeeping
- Waiters, bartenders and hotel managers.

In the other services providers, the gaps exist mainly upriver:
- Cultural tour guide upriver
- Tourist guide specialist in birdwatching and river flora and fauna.

Most of these skills are key for engagement into new market and service opportunities that were identified in the previous section. In this regard, these skills gaps represent real bottlenecks for further development of the sector. Developing skills being a mid- to long-term endeavour, it is imperative to initiate immediate action on this to perceive effects in the next few years.

- For all of the above occupations, there are currently existing courses and diplomas provided by TVET, but all are located around Brikama. Youths do not have access to tourism education upriver. It is important to develop specific training programmes and courses focusing on basic hospitability, tour guiding and tourism development skills provided by existing TVET. This requires training of TVET to deliver short- to mid-term training programmes, of 1–6 months, focused solely on these skills, and develop appropriate mentoring programme as well as the use of mobile learning or e-learning when it is seams relevant and possible.

During the sector consultations, stakeholders identified occupations also highly required to foster sector development and in which youth could find economic opportunities. These include:
- Community-based tourism developer: The role is to assist rural communities to develop services to welcome tourists and discover their way of living while participating in specific activities.
- Web content developer and web marketing for the tourism sector: The sector needs to develop its capacity to promote its services online. This includes other opportunities detailed in the next section.
- Event manager: Most events have been in place for many years. There is a need to develop new concepts and other use special cultural events (such as the Kankourang Festival) to bring tourists upriver.
- Design in crafts and garments: There is a need to revamp the production of craft in The Gambia instead of importing. For this, young entrepreneurs in fashion design can develop new products for the tourist markets.

LEVERAGING YOUTH EMPLOYMENT OPPORTUNITIES IN TOURISM

LEVERAGING OPPORTUNITIES IN COMMUNITY-BASED TOURISM AND ECOTOURISM

In addition to the cultural and historical tourism possibilities, ecotourism has considerable potential in The Gambia due the natural and varied beauty outside the coastal area along the river. This part is usually unknown to most tourists staying in The Gambia. There are various activities, such as birdwatching, fishing and local traditional cuisine. National parks and nature reserves offer a unique opportunity for tourism development. However, hospitality services and other tourism activities are in poor shape and usually do not meet European standards. There is a clear need to upgrade existing capacities involving youth in the process to become active change agents.

Leveraging youth employment opportunities in new destinations upriver along the Ninki Nanka Trail initiative

The countryside, particularly the area of Janjanbureh (Georgetown), has enough natural, historical and cultural assets to become a new tourist hub in The Gambia. However, this can only happen if interventions are planned at each node of the tourism supply chain. This includes the identification of key barriers and opportunities for tour operators and ground handlers to source and sell more Gambian sustainable tourism products.

Some examples of activities to be undertaken to develop a new destination upriver are:


Review and improve existing products.


Support the creation of a visitor centre in Janjanbureh, including historical painted artwork and a shop with local food and products.


Create community-led creative activities: Integration of tourism into daily village life.


Create events and festivals.


Backward linkages – tourism-related product development (crafts; horticulture) and diversification (design and range, etc.).

LEVERAGING THE BEACH BAR'S HOSPITALITY SERVICES

Recently funded by a small group of beach bar owners (following the demolition of the previous structures), the Beach Bars Association could act as a main actor in the future animation of the coastal area. With only a few beach bars with a completed building, the implementation of activities and events could facilitate the sourcing of funds for the youth involved in these projects to complete the construction of their facilities. With 21 plots of land where beach bars can be built, a minimum of 100 youths should directly benefit from the support (counting approximately five employees or involved individuals per beach bar).

LEVERAGING BACKWARD LINKAGES WITH AGROPRENEURS

The development of backward linkages between agriculture and tourism can provide interesting opportunities for young agropreneurs. Food and beverage expenditure is by far the largest component in tourist spending, accounting for almost half of all out-of-pocket expenditure. The purchase of locally produced agricultural supplies by hotels and restaurants is indeed an interesting market. However, the existence of well-established connections between intermediaries and hotels in the coastal area, associated with the low capacities of local farmers and the difficulties to enforce contractual agreements, all make it difficult to envisage this situation changing in the near future and becoming attractive for young agropreneurs. Yet, opportunities exist with processed food and the implementation of creative tourism activities associated with these suppliers.

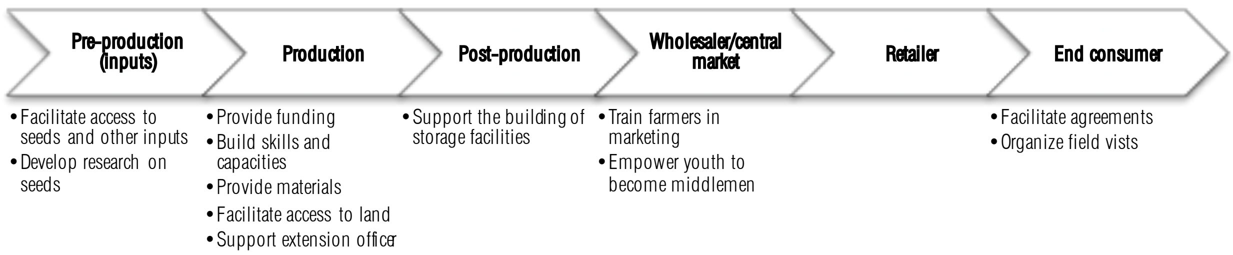
Instead of looking for traditional backward linkages between agriculture and tourism (sales of fruits and vegetables), it is advised in The Gambia to identify and possibly introduce new and unique agritourism products and services with a view to expanding and diversifying the tourism product mix beyond 'triple S' (sea, sun and sand). Proposed activities could bring horticultural producers and purchasers, sometimes tourists, together in strategic alliances, improve the knowledge and skills of chefs and promote quality and safety standards.

Tourism can be used as an experimentation platform for exports. Thus, processed food products can be used as:

- Souvenirs for the tourists;
- Creative tourism activities (jam making and processing of all local and medical herbs and spices, creating contact with local nature and culture);
- Inputs for restaurants (jam, chutney, candied vegetables, honey, royal jelly, propolis, cashew snacks, leather craft (see annex I);
- Food festivals and food fairs (discovery of local processed food products, exchange with chefs and innovative recipe competitions, etc.).

Up-country, there is a need when it comes to fruits, vegetables, meats and even fishes. In the low season, it is difficult, if not impossible, to get a European meal upon request in most of the restaurants. The current need for the implementation of traditional backward linkages are numerous (see figure 22). It is essential to work with hoteliers and restaurants to engage their businesses into agreements with local farmers.

Figure 22: Backward linkages- possible intervention



Source: ITC.

LEVERAGING OPPORTUNITIES IN SPORT ACTIVITIES AND EVENTS

- The Gambia has a unique blend of physical and geographical assets that can support outdoor sports events such as golf, tennis, water sport (kayaking, surfing, canoeing or sailing), fishing and other more adventurous sports such as endurance sports and events (cycling and running, etc.). However, the country does not have quality field-based sports infrastructure to develop an appealing sport tourism programme.
- The marina is deficient in river sports and sports fishing activities due to the lack of marine infrastructure such as harbour and auxiliary facilities. Denton Bridge serves as the boat anchoring and excursion point despite its poor state. The development of river sport tourism has been identified in the tourism development master plan as a priority area.
- The only sport activities available to tourists usually take place in the hotels. This why there could be interesting opportunities to train youth to manage recreational activities in hotels, such as: lifeguard, swimming instructor, fitness or dance instructor, tennis, volleyball and golf instructors, children's recreational instructors and water sport or circus activities for kids.

LEVERAGING ICT OPPORTUNITIES FOR YOUTH IN THE TOURISM SECTOR

ICTs, especially the Internet, have revolutionized the tourism sector. It is almost impossible to imagine touristic development projects without considering the major role of ICTs. Many countries have succeeded in using ICTs and to develop their tourism industries. The Internet has facilitated prospective tourist and current visitor services, communication and information access.

Touristic promotional activities through ICTs, especially the Internet, are managed by governments and businesses. Governments take necessary measures to encourage private sector organizations to play the role of promoters of their country as a touristic destination. In addition, web and social media help websites become more interactive. E-marketing strategies have to be developed to move from exclusively providing information on websites to enabling website visitors and social media visitors to participate and interact with the information provided. Tourism websites have to provide navigational assistance through a wide range of communication tools such as maps, photographs and videos. Additionally, websites and social media pages have to be continuously updated in different languages in order to attract the maximum number of visitors from different countries, cultural backgrounds and educational backgrounds.

The trend is also on local smartphone apps for visitors that provide a service or experience such as games (treasure hunting) and maps for local services, cultural site visits or events. The next development is to move into ‘smart tourism destinations’ and ‘smart tourism tools’ providing tourists with an enhanced customer experience through personalized information based on quick information exchange such as smart notification, using the latest technologies and tools such as QR codes or NFC tags, which provide links between the physical and digital world.[30]

However, the first opportunities are related to the digitalization of tourism services and improving The Gambia’s web presence in existing specialized websites.

30.– https://opendataincubator.eu/files/2016/06/Smart-Technologies-in-Tourism.pdf.

Source: ITC

TVET STRENGTHENING AND ENTREPRENEUR SUPPORT PROGRAMME

UPDATE EDUCATIONAL MATERIAL AND DIVERSIFY TRAINING COURSES PROVIDED BY EXISTING TVET

GTHI and ITTOG are the only two TVET active in the sector providing diplomas or certificates recognized by the local tourism industry. Table 3 presents the main activities to develop their capacities.

Table 3: Activities to strengthen training institutions

Institutions	Strengthen current capacities	Develop new services
GTHI	• Update curriculum (done with YEP support in 2017); • Develop new content manual for each level (done for the certificate level for 12 courses with YEP support in 2017); • Develop waste cycling plant and courses; • Get TedQual accreditation as a mark of quality education in tourism; • Equip its library with recent publications and Internet access to specialized online resources.	• Deliver short-term courses outside the school and develop remote mentoring programme for hospitality services outside TDA and Banjul area, for instance, Janjanbureh, Farenni or Basse; • Deliver short-term courses for entrepreneurs in hospitality services.
ITTOG	• Develop an event management diploma; • Revise business model.	• Deliver short-term courses using new mobile learning technologies to facilitate remote mentoring; • Certificate for tour guide specialized in birdwatching, and river flora and fauna.
TVET in creative industries	• Update curriculum and content manual.	• Develop courses on design for innovative crafts, garments and decorative items for interior design; • Develop courses on event management around music and dance or cinema.

DEVELOP SUPPORT SERVICES FOR ENTREPRENEURS

There is an urgent need to develop an entrepreneurship support programme in order to assist small service providers to improve the quality of their services and become more competitive. It should focus on building the capacity of local entrepreneurs involved directly and indirectly with tourism in all five regions of The Gambia. As identified in previous studies, there is a need to cover, in particular, the fundamental 'how tos' of pricing correctly, achieving and maintaining quality standards, making production processes more efficient, scaling up and registering a business.[31] Training should also be given in the basics of marketing, accounting, planning, management, sales, negotiation and conflict resolution, interpersonal dynamics and web marketing.

The programme would target two types of participants:

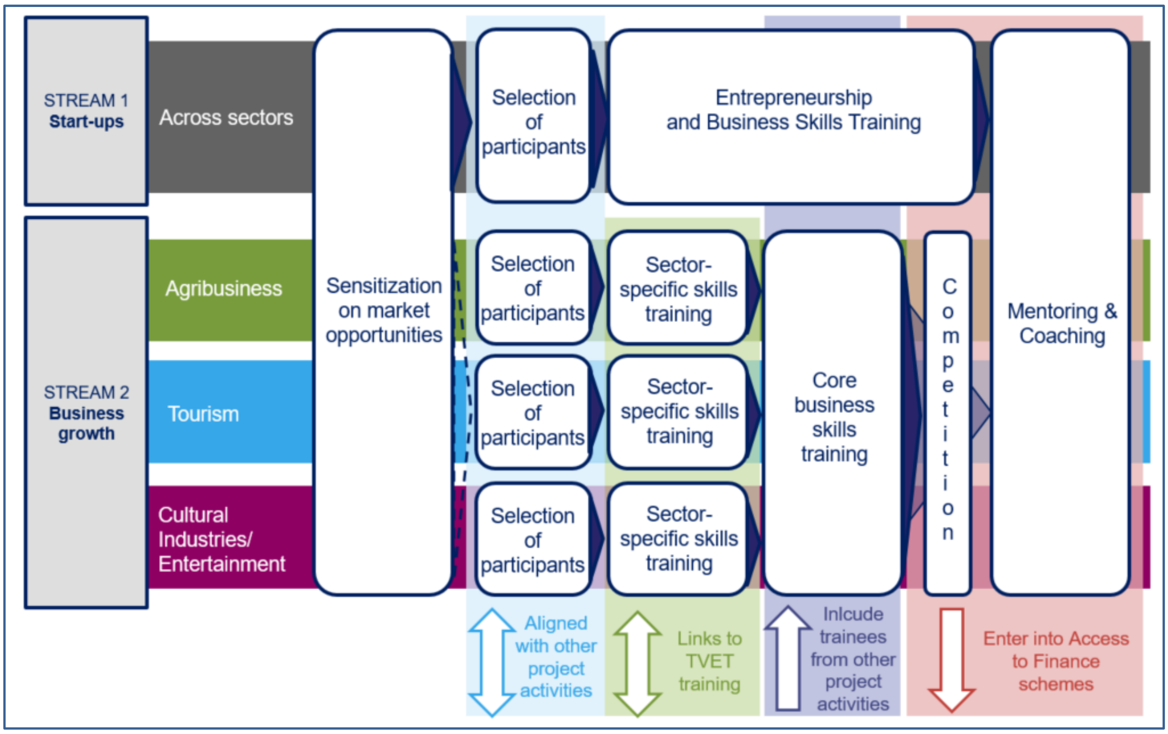
- Stream 1: Start-ups – it is oriented towards young entrepreneurs with limited professional experience who are recently graduated and are looking at focus training programmes on basic entrepreneurship and business skills.
- Stream 2: Business growth – it is oriented towards entrepreneurs with an existing business in the tourism sector who want to improve their business skills to grow their business. The depth of the training on business skills is more advanced than in Stream 1 and one can participate in a competition where financial services could be provided to the winner.

31.– The registration process will meet with much resistance. Local producers rarely agree to register themselves as businesses. Their perception is that they will be charged even more by the government for little or no return.

The concept of this entrepreneurship programme would be composed of training in some of the following areas:

a. Awareness of opportunities in tourism and market trends. This can be in the form of communication campaigns prepared in collaboration with the sector association ASSERT and Class B Operator Association.
b. Training on how to make a business work in tourism in collaboration with the GTB and other partners to be identified. Possible partnership with successful entrepreneurs could be developed to use their experience as mentors.
c. Business skills training with entrepreneurs, including financial literacy, developing a business plan, and sales and marketing with a focus on web marketing and social media, etc.
d. For Stream 2 only – at the end of the business skills training, there will be a competition for entrepreneurs to pitch their plans and the winners will receive funding or maybe the opportunity to pitch at a particular event with investors.
e. After the training and competition, the programme will further support the entrepreneurs through mentoring schemes.

Figure 23: Entrepreneur and business growth concept for The Gambia



Source: ITC.

STRENGTHEN SECTOR COORDINATION TO SUPPORT YOUTH IN TOURISM

Some opportunities identified above could suffer from an existing generation conflict. Therefore, it is important for any support programme to understand the debate on both sides of the issue of youth empowerment. Although it is important to offer a space for new ideas and profiles, one should not forget that it is crucial to take some time to efficiently transfer leadership.

The failure or closing of several projects and interventions, and the financial difficulties met by the tourism stakeholders must encourage them to change their business models. Stakeholders should not expect a development assistance programme to relaunch their activities, but more to offer alternatives to previous ones and strategies to be more resistant to crisis and outbreak.

It is recommended that stakeholders fully commit to supporting youth empowerment.

Source: ITC

Commitment of private sector to attend and activitely participate in capacity building activities	• The approach is top-down, requiring managers to attend and to share what they have learned.
Commitment of local youth to attend and actively participate in product development	• The social fabrics of selected local communities must be strong.
Commitment of local authorities to facilitate the project's implementation	• Local authorities are expected to share information that could affect the project's implementation.

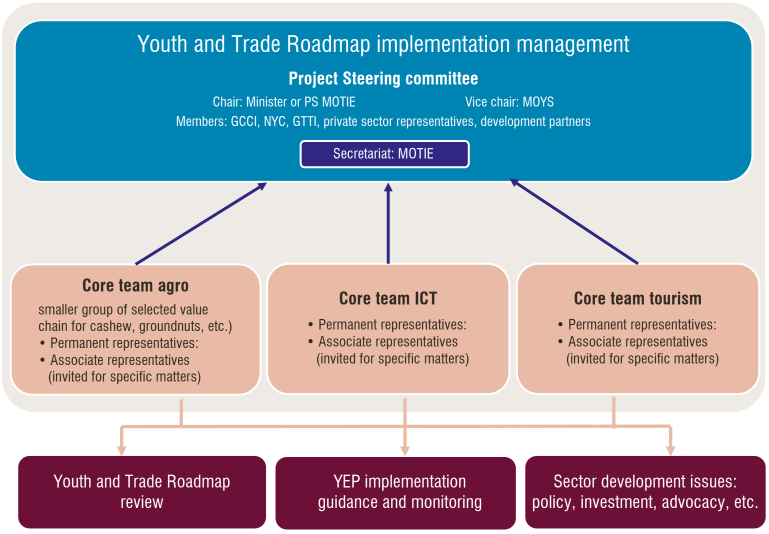
Importance of coordinated action and youth representation

The roadmap is geared towards creating conditions for the favourable expansion of youth economic opportunities in tourism. This development requires the elaboration and coordination of various activities. Success will depend on stakeholders' ability to plan and coordinate actions in a tactical manner. Activities must be harmonized across the public sector, private sector and education providers in order to create sustainable results and guarantee maximum impact.

The roadmap is not any specific institution's responsibility. Rather, it is the implementation framework of The Gambia's National Development Plan and main economic policy, and strategies have a bearing on youth economic empowerment, including the National Youth Policy, Gambia National Export Strategy, the new National Entrepreneurship Policy, and the Youth and Trade Roadmap.

It is recommended that The Gambia establishes independent sector core teams for public–private deliberations that act in an advisory capacity to the government and the private sector regarding issues related to or affecting a specific sector and their related development plans.

Figure 24: Youth and Trade Roadmap implementation management framework

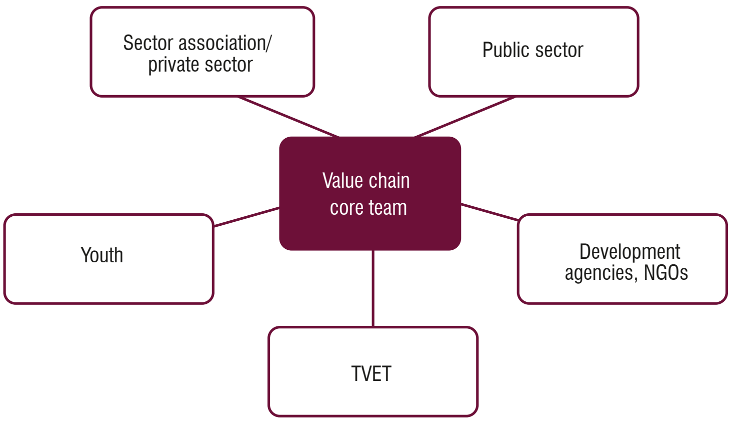


The core team's objectives are:

a. To ensure that the interests of sector stakeholders are represented in the policy alignment, planning and road-map implementation;
b. To act as a consultative and technical advisory body to the Youth and Trade Roadmap steering committee, Ministry of Trade, Industry, Regional Integration and Employment, Ministry of Youth and Sports, Ministry of Agriculture and other national stakeholders;
c. To convey the aspiration and ideas of the youth in the design and implementation of the sector development strategies, both in the public and private sectors.

The core teams are composed of representatives of the country's youth, public sector, private sector, sector associations, TVET, development agencies, civil society and locally based NGOs, as described in figure 25.

Figure 25: Youth and Trade Roadmap sector core team



STRATEGIC OBJECTIVES OF THE YOUTH AND TRADE ROADMAP FOR TOURISM

Strategic objective 1: Foster the creation of diversified tourism products and services

- Operational objective 1.1: Improve and diversify community-based and cultural tourism services up-country
- Operational objective 1.2: Develop new tourism services and products in coastal areas
- Operational objective 1.3: Foster backward market linkages between tourism private sector suppliers, ICT and agriculture

Strategic objective 2: Reinforce youth skills through vocational training and TVET strengthening

- Operational objective 2.1: Improve the quality and relevance of TVET educational programmes
- Operational objective 2.2: Upskill youth involved in hospitality services through high-impact training programmes

Strategic objective 3: Develop and reinforce youth entrepreneurship in the tourism sector

- Operational objective 3.1: Encourage youth entrepreneurs in the tourism sector
- Operational objective 3.2: Provide financial support to youth entrepreneurs in the tourism sector up-country

Source: ITC

Source: (CC BY 2.0) Mishimoto, Cyclist, Gunjur Gambia

PLAN OF ACTION
2018–2022

Activities	Priority 1=high 2=med 3=low	Starting period 2018	2019	2020	2021	2022	Beneficiaries	Leading institutions	Implementing partners
Strategic objective 1. Foster the creation of diversified tourism products and services									
Operational objective 1.1 Improve and diversify community-based and cultural tourism services up-country									
1.1.1. Develop sustainable and inclusive development strategy for new destinations upriver • Develop a strategy development plan for Janjanbureh (activity started in 2017 with YEP support) • Establish a public–private–youth partnership to develop the strategic plan	1						Community in Janjanbureh	GTB VDC Governor's office	GTHI NCAC ITTOG ASSERT YEP
1.1.2 Encourage the review and improvement of existing tourism products using the Ninki Nanka Trail initiative • Improve safety of the river excursion to Baboon Island, and boat standards • Develop artistic signboards in cultural places • Improve existing community visitors' experience (Kunkilling Forest Park and Ninki Nanka Trail) • Rejuvenate the Stone Circle Museum	2						Youth upriver	GTB	NCAC ITTOG ASSERT YEP
1.1.3 Support for the creation of a visitor centre in Janjanbureh Develop multi-function information centre managed by youth to provide information, tourism services and commercial outlets for local food and crafts	1						Youth in Janjanbureh area	GTB Government office	NCAC MOTIE MoYC YEP
1.1.4 Diversify and improve community-based tourism experience • Train youth in tattooing, beading, preparation of traditional food and community tours • Train local villagers in improving the design of crafts and develop weaving	2						Youth in Janjanbureh area	GTB	NCAC GTHI ITTOG Identified villages in Central River Region YEP
1.1.5 Develop local cultural festivals • Rejuvenate cultural events such as Kankurang and develop new festivals to attract tourists • Train youth in event management	2						Youth in Janjanbureh	NCAC	GTB YEP
Operational objective 1.2 Develop new tourism services and products in coastal areas									
1.2.1 Raise capacity to design educational and study programmes • Build capacity of Class B tour operators and training institutions to design and operate high-quality educational programmes, and work effectively with local community guides to deliver great CBT experiences							Tour operators and training institutions	GTB	ITTOG ASSERT GTHI Tour operators
1.2.2 Support the creation of cultural and sport events managed by youth Develop new events using sports, art, dance and culture Organize the 1st movie festival Organize a chef competition to promote local cuisine	2						Young artists	GTB NCAC GHA	FSDC ITTOG ASSERT GTHI Chef Association
1.2.3 Improve the services of beach bars • Support the creation of a beach bar association to foster cooperation • Train staff and bar owners in food safety and quality • Create a business growth training and mentoring programme for future beach bar owners and employees • Create a competition during the high season to improve services standards, develop promotional activities and foster linkages with hotels	3						Beach bars	GTB	ITTOG ASSERT FSQA GTHI TGSB

Activities	Priority 1=high 2=med 3=low	Starting period					Beneficiaries	Leading institutions	Implementing partners
		2018	2019	2020	2021	2022			
Operational objective 1.3 Foster backward market linkages between tourism private sector suppliers, ICT and agriculture									
1.3.1. Improve access of young agropreneurs and craftsman to local tourism market • Create a weekend market for locally processed food and crafts made by youth initiatives targeting seasonal tourists • Develop a brand and concept around the 'good market' providing a distinct experience to tourists	1						Youth entrepreneurs	ASSERT	GTB GYCC GHA ITTOG AACE
1.3.2. Develop linkages between locally produced agroprocessed food and hospitality service providers Identify high-potential products through field research and interviews Set up a youth entrepreneur catalogue of processed food suppliers Organize business-to-business events and prizes for best products, packaging and quality Provide support to improve packaging, food safety, quality management, marketing and negotiation	1						Youth entrepreneurs in agro-processing and hotel chefs	ASSERT Gambia Hotel Association	FSQA GTHI GHE
1.3.3. Improve MSMEs' access to online marketing services in the tourism sector • Link small and medium companies with young multimedia and web designers to develop online information and web marketing campaign • Digitalize marketing materials and develop use of social media to position the services (Activities linked to entrepreneurship programme 1.1)	2						Youth entrepreneurs	ASSERT	Association of Category B Tour Operators Information Technology Association of The Gambia (ITAG)
1.3.4 Develop innovative destination promotion strategy for new tourism services upriver, focusing on cultural, adventure and educational tourism Create new marketing material and public–private partnership around the Ninki Nanka Trail initiative, focusing on free independent travellers and small group adventure operators Participate in international tourism trade fair to promote new tourism services Organize familiarization trips for travels agents of small group adventure tour operators and educational programmes • Develop river cruise familiarization trip for artists (writers, painters, poets and musicians) from the diaspora community and European youth social media influencers for creative exploration and development of artistic online promotional material and mentoring Gambian youth artists	2						Stakeholders involved in providing tourism services upriver	GTB	ITTOG GTHI ASSERT Association of Category B Tour Operators YEP Foreign tour operators specialized in small group adventure and educational programme Ground agents
Strategic objective 2. Reinforce youth skills through vocational training and TVET strengthening									
Operational objective 2.1 Improve the quality and relevance of educational programmes									
2.1.1. Improve the training capacities and quality of The Gambia Hospitality Training Institute • Update curriculum (done with YEP support in 2017) • Develop new content manual for each level (started with YEP support in 2017) • Develop waste cycling plant and courses • Get TedQual accreditation as a mark of quality education in tourism • Equip the library with recent publications and access to specialized online resources • Develop partnership with foreign TVET for specific course and programme development, professor visits and student exchange	1						GTHI	NAQAA MoT	Foreign partners GHA
2.1.2. Improve the training capacities of TVET to deliver short-term courses and mentoring in new destinations up-country • Receive UNWTO high-impact training for short courses (started with YEP support in 2017) • Develop training programme for remote locations	1						Hospitality service providers	GTHI ITTOG	ASSERT Tour Guide Association

Activities	Priority 1=high 2=med 3=low	Starting period 2018	2019	2020	2021	2022	Beneficiaries	Leading institutions	Implementing partners
2.1.3. Improve the training capacities and quality of ITTOG • Review and improve curriculum and develop a new business model • Develop partnership with foreign TVET for specific course and programme development, professor visits and student exchange • Develop short-term courses using new mobile learning technologies to facilitate remote mentoring • Create a certificate for tour guides specialized in birdwatching, river flora and fauna	2						ITTOG	NAQAA MoT	Foreign partners ASSERT
Operational objective 2.2 Upskill youth involved in hospitality services through-high impact training programmes									
2.2.1. Develop youth skills in hospitality services in new rural destinations • Develop a part-time training programme focusing on the needs of the youth groups in the Central River Region particularly around Janjanbureh area to become waiters, housekeepers, cooks, guides, receptionist or managers	1						Youth in Central River Region and new destinations up-country	GTHI	Local government Hospitality service providers
2.2.2 Develop skills of youth in tour guiding, community-based tourism development and information services management • Train youth in tour guiding for birdwatching, cultural tours and adventures in collaboration with hotels and tour operators • Train youth in community-based tourism development -Train youth in basic reception skills in rural areas	1						Youth in Janjanbureh and new destinations up-country	GTB	ITTOG GHA Local government NYC Local youth association
2.2.3 Develop youth skills in management of sport events, recreational activities and entertainment • Train youth to manage recreational activities in hotels such as: lifeguard, swimming instructor, fitness or dance instructor, tennis, volleyball and golf instructors, children's recreational instructors, water sport or circus activities for children in collaboration with hotels and tour operators • Train youth to create and manage cultural or sport events	2						Young athletes	GTB ASSERT NYC	GHA ITTOG MOYS NYC Sports federations ITTOG Fajara Skills Development Centre
2.2.4 Develop youth skills in creative design for crafts and garments • Train young designers in creative design for crafts and garments	2						Young designers	NAQAA NYC	TVET in creative industries Fajara Skills Development Centre
Strategic objective 3. Develop and reinforce youth entrepreneurship in the tourism sector									
Operational objective 3.1 Encourage youth entrepreneurs in the tourism sector									
3.1.1. Promote entrepreneurship in tourism and creative industries in rural areas up-country • Develop a youth entrepreneurship support programme in tourism in rural areas up-country • Identify, assess, profile and engage youth groups in selected destinations in rural areas up-country supported by local communities	1						Youth entrepreneurs in rural areas	GTB GYCC	ASSERT GTHI NCAC ITTOG YEP
3.1.2. Reinforce the products and services offered by young entrepreneurs in coastal areas through mentoring programme Create a business growth training and mentoring programme for young entrepreneurs in the coastal areas	2						Youth entrepreneurs in coastal areas Class B tour operators	GTB	ASSERT, GYIN GTHI ITTOG MDI GTB Association Class B Tour Operators Startup Incubator

Activities	Priority 1=high 2=med 3=low	Starting period					Beneficiaries	Leading institutions	Implementing partners
		2018	2019	2020	2021	2022			
Operational objective 3.2 Provide financial support to youth entrepreneurs in tourism									
3.2.1. Provide financial support to young entrepreneurs in rural areas • Through mini-grants, assist youth who participated in the tourism training programme to purchase equipment to develop their services • Develop and disseminate clear terms and conditions for accessing mini-grant scheme	1						Trained youth	GTB	NACCUG YEP
3.2.2. Build basic financial skills capacity of young entrepreneurs and small business owners in coastal areas Train young entrepreneurs and small businesses owners to participate in financial management training to develop their capacity to manage basic bookkeeping and financial planning and apply for loans.	2						Young entrepreneurs	MDI	GIEPA Empretec trainers GYIN

ANNEXES

ANNEX I: IDENTIFIED PRODUCTS WITH STRONG POTENTIAL FOR LINKAGES WITH TOURISM

Products	Comments	Needs and strategy
Honey	A sales and marketing platform is needed to increase the linkage with hotels. Larger recycled and sterilized containers can be used instead of the expensive recycled glass jars in order to reduce costs.	• Develop comprehensive agreements with hotels • Use existing channels (National Coordinating Organization for Farmers Association in The Gambia and the National Women Farmers Association, etc.) • Raise tourist awareness and change consumption behaviours
Royal jelly (honey)	Rising star product The equipment needed to extract the royal jelly from the honey is not available locally.	• Market study • Visitor survey (interest in royal jelly as a product or as a souvenir) • Capacity building
Propolis (honey)	Rising star product with increase of homeopathy The equipment needed to extract the propolis from the honey is not available locally.	• Market study – contact pharmaceutical laboratories • Capacity building
Jam	Care for Natural, a local food processor, supplies locally made jams to hotels and supermarkets.	• Improvement of food hygiene and quality standards • The jam can be delivered to hotels in recycled and sterilized 5 kg containers • Raise tourist awareness and change consumption behaviours
Cashew snack	Good quality standard processing facility, preferably with renewable energy as well as good packaging can increase the linkage.	• Linkages to other ITC projects • Support to The Gambia National Agricultural Research Institute (NARI) • Label to products
Leather craft	A large quantity of cow skin is exported to the subregion, with some of it is consumed locally.	• Training by regional experts • A more structured leather tanning facility (traditional Moroccan way) combined with leather sewing machines will help local artists produce quality items such as hats, belts, pocket wallets and iPad bags, etc.
Aquaculture	Building fish ponds benefiting from the freshwater flows of The Gambia River could supply fresh fish to lodges upriver.	• Fish farming training • Food testing

Source: Opportunity study for the development of inclusive tourism activities in The Gambia, 2013.

ANNEX II: STRATEGIC VISION FOR SUSTAINABLE DEVELOPMENT OF TOURISM IN JANJANBUREH

The vision is to improve the sustainability of Janjanbureh as a tourism destination, reinvigorate the respective roles of each tourism stakeholder and develop inclusive and sustainable tourism products and services through youth empowerment.

Objective	How	Who
To improve local tourism management	• Develop local tourism statistics: record of tourism and tourism-related businesses and international arrivals and departures • Establish constructive dialogue between tourism stakeholders: implement a destination management organization (DMO) • Prepare a code of conduct for tourism professionals in Janjanbureh • Set priority for the management of resources and planning • Attract responsible tourism investments	Need to seek support from GTB and Ministry of Tourism & Culture
Improve visitors' experience	• Improve existing offer: • Transform village visits around Janjanbureh into creative experiences that last longer and encourage more spending; • Review, and mostly standardize, the existing city tours; • Enhance and secure the river experiences. • Develop new products • Empower surrounding communities and develop ecotourism	Supported by YEP
Improve local technical skills	• Innovative training strategies • Entrepreneurship programme • Awareness-raising strategies at regional level	Supported by YEP

ANNEX III: LIST OF PROPOSED YEP ACTIVITIES IN THE JANJANBUREH REGION

All activities include training and capacity building of the Janjanbureh youth.

1. Revitalize the tourism offering within the town of Janjanbureh

    - Creation of a visitor information centre;
    - Creation of signboards and explanatory boards for the top attractions;
    - Creation of two thematic city tours and training youth on tour guiding;
    - Creation of a painted artwork illustrating the history of Janjanbureh;
    - Creation of a hair braiding fashion show and photography exhibition;
    - Support the Janjanbureh Kankurang and Masquerade Festival.

2. Revitalize the tourism offering in the surroundings of Janjanbureh

Develop and market community-based tourism with selected villages around Janjanbureh.

- Receive assistance from master trainer to train youth to work with villages to receive tourists and organize activities such as tattooing, preparation of traditional food (peanut butter and baobab juice, etc.) and visit the village gardens.

3. Improve hospitality services within the area of Janjanbureh
    - Train youth in the Central River Region to get foundations certificate through the hospitality training programme delivered and coordinated by GTHI;
    - Assist lodges and restaurant to improve their services through the coaching and mentoring programme done by GTHI.

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YOUTH EMPOWERMENT PROJECT

UNLOCKING POTENTIAL TO CREATE WEALTH

This project is funded by the European Union