

National Seminar

“The Gambia’s tourism sector: Measuring its value chain and exploiting its potential”

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PRESENTATION OUTLINE

- ❖ **Tourism Industry in Gambia**
- ❖ **Importance of Tourism in The Gambia**
- ❖ **The Gambia Tourism Value Chain**
- ❖ **Target value chain: Goods and services consumed by Nigerian tourists**
- ❖ **Expectations from the Project on Services Trade in Africa (focus on Tourism)**

Tourism Industry in The Gambia

The tourism industry is a major contributor to the national economy accounting for

- ❖ 16% - 20% of Gross Domestic Product (GDP),
- ❖ supporting over 41,800 direct and 65,500 indirect jobs (WTTC Gambia 2018) (18% of employment)
- ❖ It has attracted US\$ 45 million in foreign investment over the last 5 years
- ❖ providing the necessary air cargo opportunities to support the development of some of The Gambia's other sub sectors (shellfish, horticulture, and other international business activities)
- ❖ The tourism industry in The Gambia is seasonal in nature
- ❖ Over the past years, The Gambia achieved steady growth
- ❖ Almost all tourists are holiday-makers and 84% are on holiday packages that generally include flights, transfers and bed and breakfast accommodation in a hotel.

Importance of Tourism in The Gambia

Tourism is a growing sector in terms of demand;

- ❖ It is a sector in which has a comparative advantage due to our climate and availability of cultural or natural assets;
- ❖ It is a labour intensive sector, with high female participation rates;
- ❖ It provides a wide range of opportunities for work, both unskilled and skilled, that are well-suited to women and young people.
- ❖ It creates opportunities for micro and small enterprises, as start-up costs are often low;
- ❖ It can provide opportunities for minority communities and support their culture.

The Gambia Tourism Value Chain

- ❖ Components of the Gambia Tourism value chain includes International Tour Operators, Airline Companies, Ground Tour Operators, Landing & Passenger Handling, Food & Beverage, Hotel & Restaurant, Shopping, Excursions, Local Transportation and other discretionary expenditures
- ❖ Applying value chain analysis to the tourist package itself suggests that most of the value is absorbed by the international tour operator, the airline company and the hotel at the destination (Green Season about one-fifth of the package price and peak almost one-third of the higher priced winter package
- ❖ Gambian tourism derives some benefits from the out-of-pocket, or discretionary expenditure by tourists . Items such as food and beverages, shopping and excursions account for less than one-third of the tourism value chain.
- ❖ less is known about the indirect linkage between the demand for food from tourist hotels and restaurants and the supply from the farmers and fishermen, some of whom appear to be accessing the tourism value chain.

International/Ground Tour Operators



Air Company



Landing & Passenger Handling



Ground handlers



Accommodation



Food & Beverage, Hotel and Restaurant



Shopping



Excursion



Local Transportation



Other Discretionary Expenditures

Target value chain: Goods and services consumed by Nigerian tourists

The Nigerian are one of the highest number of nationalities that travel to The Gambia purposely for tourism in the sub region.

- Product/service: Holiday/leisure, Meeting incentives, conference and exhibitions.
- Mode of Transportation: Scheduled flight (Air Peace, ASKY, and Arik(not flying now)), they buy packages through traditional travel agents or some will do a booking directly to the resorts of their choices.
- A tailored made packages: Marriage/wedding ceremonies, marriage anniversaries, shopping etc., for their holiday in the Gambia.
- Accommodation: five, four and three star hotels especially Coco Ocean Resort, Senegambia, and African Princess hotels.
- Accommodation facilities: Nigerian frequently used Spa massage and wellness, full/half board, excursions and shoppings.
- MICE: majority of the Nigerian attends Annual Insurance Convergence in the Gambia in partnership with West African Insurance institute, ECOWAS Protocol, and Religious (Missionaries, Chapel, Evangelist, Catholic, etc).

Expectations from the Project

- ❖ Formulating policies that support linkages and reduce leakages of the tourism sector and strengthen regional tourism value chain
- ❖ Identifying and quantifying the regional value chains in which The Gambia's tourism sector participates
- ❖ Quantifying value addition by tourism demand from the region.
- ❖ Build Capacities in measuring the following:
 - ✓ domestic and foreign value added to The Gambia's tourism sector, by source industry
 - ✓ backward and forward linkages and identifying how they could be strengthened
 - ✓ leakages and identifying how I could be reduced



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