



**YOUTH
EMPOWERMENT
PROJECT**

International Trade Centre: The Gambia Tourism Strategy

Measuring The Linkage Between Tourism And Creative Industries

**The Youth Empowerment Project:
Tourism and the Creative Industries**

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Agenda

1. YEP Implementation Principles

- ❖ Value chain and skills development

2. YEP INTERVENTIONS

- ❖ Value addition to culture and nature
- ❖ Community-based tourism

3. MARKET POTENTIALS

- ❖ AFCTA and regional

4. TOURISM DEVELOPMENT

- ❖ A proxy to measure value addition and linkages

1. Tourism Strategy: The Gambia

Assessment & Consults

MSME

Skills

TVET

Institutions

Value chain

Mapping

Stakeholders

Youth and Trade Tourism Roadmap

Market-lead
strategyYouth-
centered

Match training & skills gaps

Plan of Action

Support national
programmes

Sector Value Chain Development

New productsImprove products:
quality and safety

Creative industries

Skills and
entrepreneurshipMSME productive
capacities**Promotion and market
linkages and access**

Institutional Development

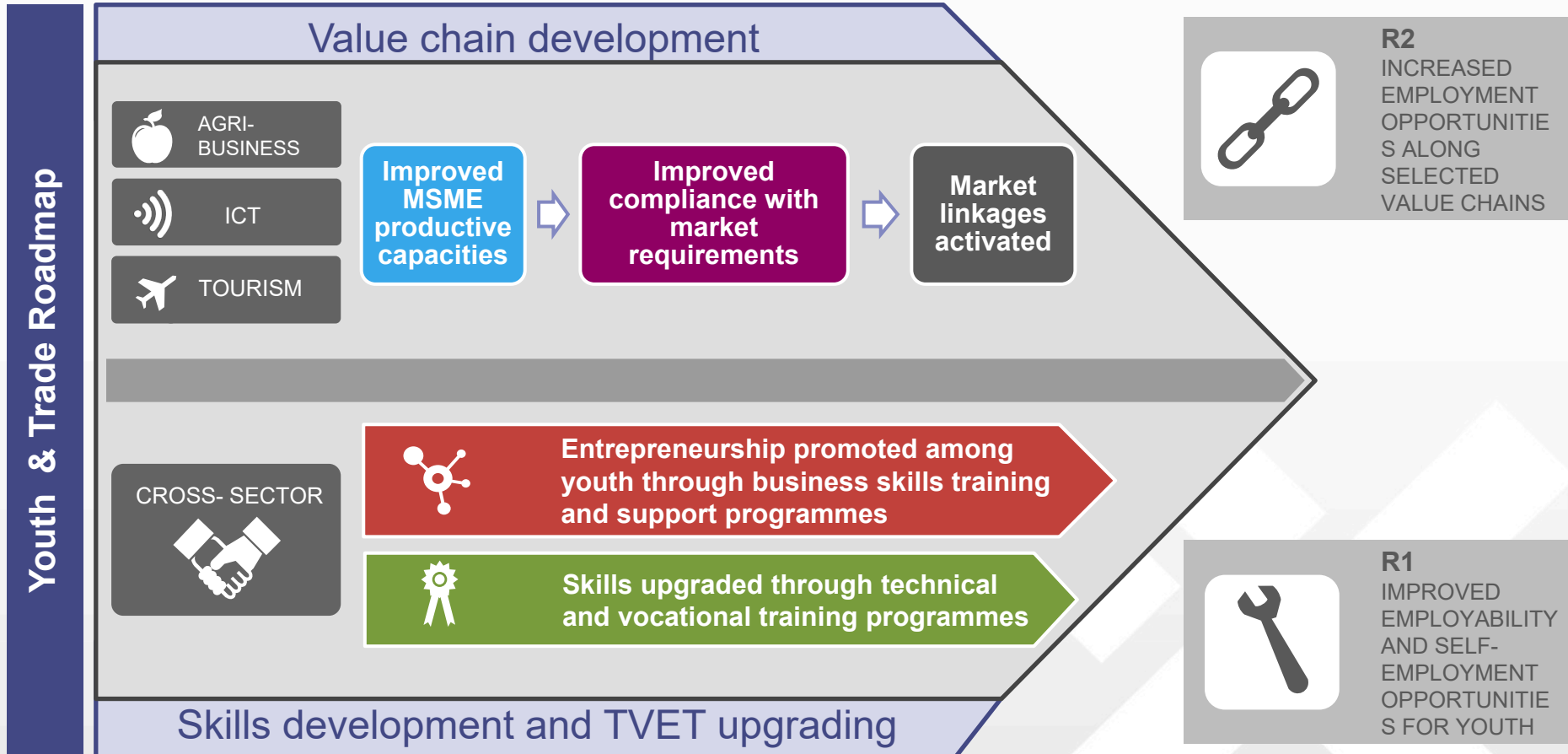
Upgrade TVET curriculum and training
capacity

Strengthen associations

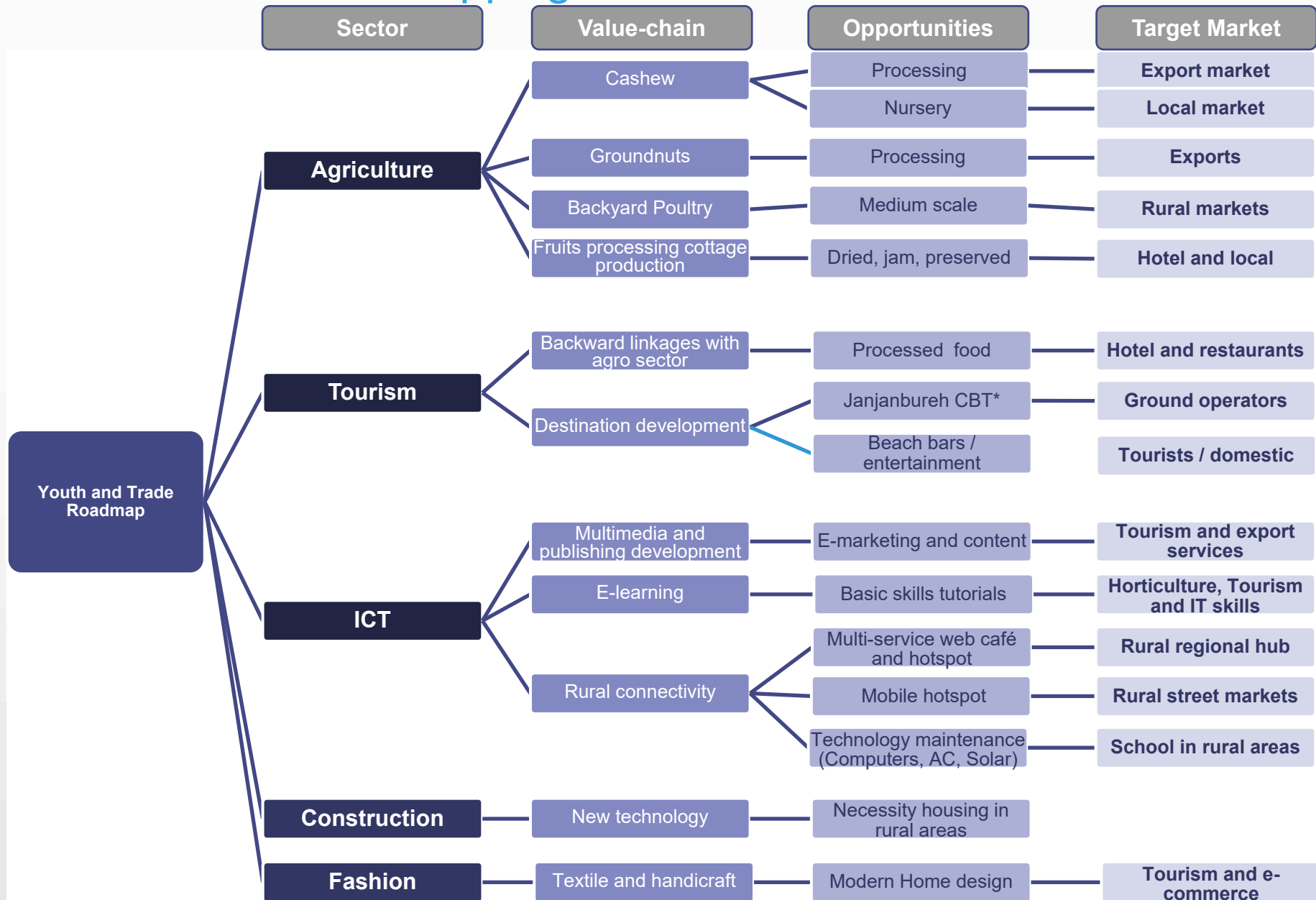
Capacity building of public agencies



1. YEP Implementation Principles

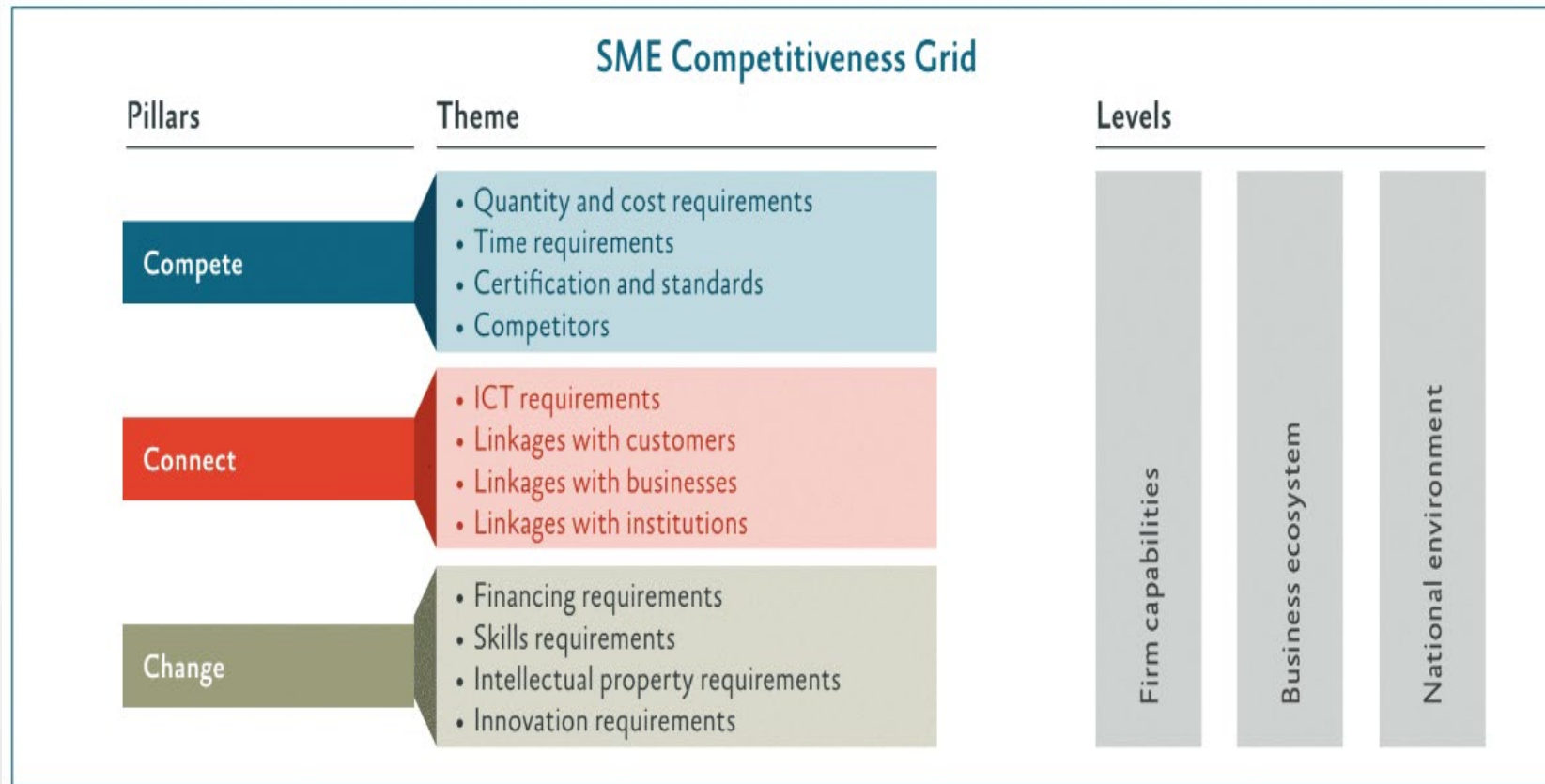


Sector value-chain mapping



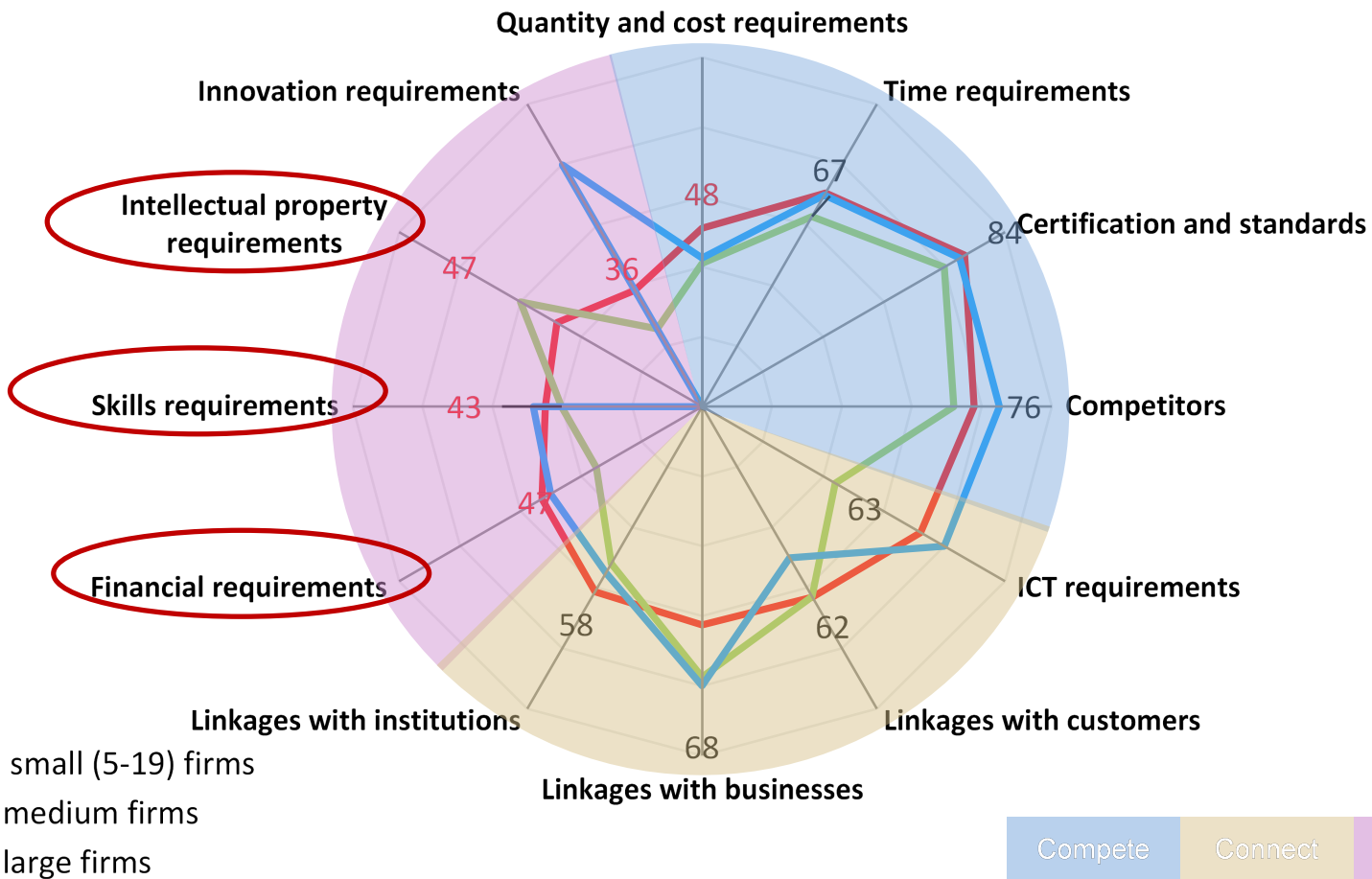


Measurement Tool: SME Competitiveness Assessment



MSME key competitiveness constraints

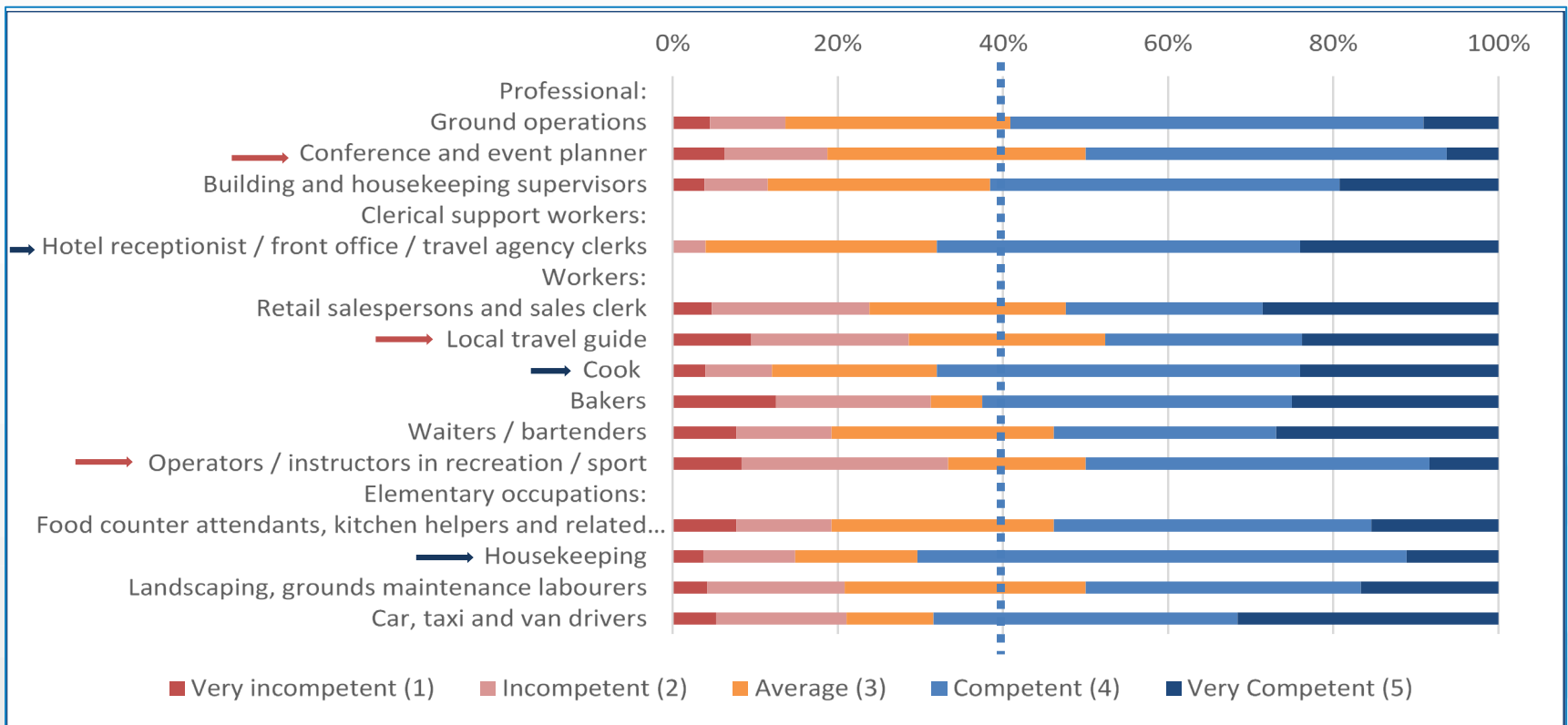
As with firm-level issues, external factors also mostly affect firms in their capacity to change in line with market needs. However there is also an issue with quality assurance and particularly the efficiency of certification bodies which affects all types of firms in the sector





Skills Gap Analysis at Sector Level: Tourism

Level of competencies – Tourism



Source: ITC SMECS The Gambia, 2017.



Most needed occupations in tourism

| Occupations | Score |
|--------------------------------------|-------|
| Cook | 24 |
| Housekeeping | 10 |
| Waiters/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

^[1] 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).

Value chain mapping

Accommodation: number of identified hotel rooms amounts to 3,350, providing some 8,500 beds in addition to 455 guest-house room stock, providing about 1,000 beds

Restaurants: It has developed just as much as the hotel sector but has however not received the same attention. When dealing with tourism most of the focus is on the hotel sector.

Tour operators: over 80% of the Gambian package tourist market is dominated by seven international tour operators: three British operators.

Tour guides: very few well qualified guides are available in the country. In addition the profession's image is still deterred by the presence of "bumsters".

Transportation: There is a clear over-supply of tourist taxis. Due to the over-supply & lack of market access many taxis do not get to be hired that frequent

Souvenirs and crafts: there are some 700 licensed traders in The Gambia selling crafts to tourists at seven crafts markets.

Between 5% and 10% of products are roughly imported.

Low capacity, skills & Innovation- Artisans produce in fragmented environments with little appreciation of market requirements, quality, design, standards & price.

Appreciation of Gambian handicrafts, especially by tourists, be it regional or international is not significant.



Qualitative Tools: Market Research: Trends, Needs, Gaps

- Demand for **authentic experiences in adventure, community-based, and education travel**
- **West Africa lacks popular “regional” overland routes** to create a solid brand within the region (except Senegambia but still minimal)
- Products and **services quality is rather similar to all emerging destinations** worldwide but there is a huge gap between the coastal and up-country regions of the Gambia.
- **Diversification attempts** have been initiated but have yet failed partly due to the commercialization structure of services from The Gambia
- Many **missed opportunities in crafts and creative tourism**

Comparable Challenges In Tourism & Creative Industry

❖ **Capacity to Compete:**

- Outdated techniques in labour productivity
- Inconsistent supply of domestic resources
- High cost of imported materials

❖ **Capacity to Connect**

- Linkages among sectors
- Strategic approach to attract additional investment

❖ **Developing skills and entrepreneurship**

- The lack of specific training institute for multimedia, performing arts ...etc
- Access to finance is scarce and limited for artists

❖ **Business environment constraints and institutional support**

- Institutional support
- multiplicity of sector associations and interest groups
- Absence of training institutes for creative industry

YEP Project Interventions

❖ Value addition of culture and nature

- Food quality and safety
- River-based cultural tours in rural regions: Ninki Nanka Trail
- Fashion Weekend Gambia: build identity and brand
- Gambia Dance Competition: access to market and identity

❖ Skills, market access and linkages

- Training in services, production, event management, entrepreneurship
- Pop-up market for youth entrepreneurs: Gambia's Good Market
- Responsible tourism and marketing training for tour operators
- Product development and promotion of new products to international markets

❖ Creative Industry Roadmap

- ITC methodologies for job-centered national growth and market-led strategy
- Entrepreneurship in the creative industries training pilot



Janjanbureh Tourism Development



Community-based cultural and nature tours



Kankurang Cultural Festival



Craft development programme

REGIONAL MARKET TREND & POTENTIAL

NIGERIAN MARKET

- 2013 registered over 40,000 arrival and there has been a stable & slight growth since.

REGIONAL TOURISM

- Trends in African tourism, (WTM Africa 2017) which represent opportunities for CBT in The Gambia included ecotourism and cultural tourism.

SUPPORT FACTORS FOR GROWTH OF THE REGIONAL MARKET

- The 'sharing economy' (e.g. Airbnb) gaining traction;
- Multi-channel approaches (online marketing);
- Expansion and development of luxury resorts and hotels
- The expansion of an African middle class
- Improved transport infrastructure and air connectivity,
- Easing regulations for low cost airlines to operate.
- Improve on natural and cultural resource conservation and management.

3. Market Potentials (AFCTA and Regional)

- ❖ West African countries could rely on **two major source markets**
- ❖ First is northern countries, particularly **West-Europe**
- ❖ Second is the **South-South market of West Africa**, which is growing due to the emergence of the upper middle classes
- ❖ This regional market could be organized based on the logic of complementarity rather than competition- **support a regional brand**
- ❖ Evolve competition into cooperation between WA destinations, by creating **regional routes**
- ❖ Develop **themed** regional routes which include **cultural and eco-tourism experiences**
- ❖ Develop **market linkages**, training of trainers, and investment **from Nigeria** in the creative industries

4. ITC Tourism Development

A proxy to measure value addition and linkages with the creative industry

| Outputs | Indicators: |
|--|--|
| New cultural products and brands | New products in community-based tourism and a national brand (NNT) |
| New market segments created | New target markets: Special interest groups, adventure, and education travel |
| Market linkages with cultural products | Production promotion to develop business to business opportunities for local tour operators and international market |
| Improvement of MSME's productive capacities | Improvements in production, design, and market access in the creative industries |
| Skills training in design, production and entrepreneurship | |



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