



GOVERNMENT OF THE GAMBIA

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Tourism Marketing Strategy Development and Implementation

Tourism Diversification in The Gambia Project (TDRGP)

REPORT 4: MARKETING, BRANDING AND INVESTMENT PROMOTION STRATEGY

FINAL

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List of Acronyms

AI	Artificial Intelligence
ATM	Arabian Travel Market
B2B	Business to Business
B2C	Business to Consumer
CAGR	Compound Annual Growth Rate
CIIE	China International Import Expo
DMCs	Destination Management Companies
DOM	Document Object Model
ECOWAS	Economic Community of West African States
EU	European Union
FAM	Familiarisation (trips)
FDI	Foreign Direct Investment
GCAA	Gambia Civil Aviation Authority
GCC	Gulf Cooperation Council
GDP	Gross Domestic Product
GIEPA	Gambia Investment and Export Promotion Agency
GMD	Gambian Dalasi
GRTS	Gambia Radio and Television Service
GT Board	GT Board
GTA	Gambia Tourism Authority
HRD	Human Resource Development
ICT	Instituto Costarricense de Turismo
IDA	International Development Association
IPF	Investment Project Financing
ITB	International Tourism Fair (Berlin)
JMAs	Joint Marketing Agreements
JVs	Joint Ventures
KPIs	Key Performance Indicators
MICE	Meetings, Incentives, Conferences, and Exhibitions
MoFAIC &GA	Ministry of International Cooperation and Gambians Abroad
MoEPID	Ministry of Economy, National Planning & Industrial Development
MoF	Ministry of Finance

MoTAC	Ministry of Tourism, Arts and Culture
NTPS	National Tourism Policy and Strategy
OIC	Organization of Islamic Cooperation
PPC	Pay-Per-Click
PPCPS	Public-Private Community Partnerships
PPP	Public-Private Partnerships
PR	Public Relations
ROI	Return on Investment
RTP	Responsible Tourism Partnership
SAVE	Scientific, Academic, Volunteer and Educational
SDG	Sustainable Development Goal
SEO	Search Engine Optimization
SLCB	Sri Lanka Convention Bureau
SLTPB	Sri Lanka Tourism Promotion Bureau
STM	Saudi Travel Market
SWOT	Strengths, Weaknesses, Opportunities, and Threats
TDRGP	Tourism Diversification and Resilience in The Gambia Project
TGE	The Gambia Experience
ToFGAM	Tourism Federation of The Gambia
TVC	Television Commercial
UN Tourism	United Nations World Tourism Organization
UNEP	United Nations Environment Programme
VFR	Visiting Friends and Relatives
WTM	World Travel Market

Executive summary

This document is formulated as part of the Government of The Gambia's Tourism Diversification and Resilience in The Gambia Project (TDRGP). It will guide the marketing of tourism for the next five years and will include a five-year action plan with corresponding activities, tactics, targets and budgets. The document is the result of an intensive analysis and consultative process that has included an in-depth situation analysis report and various stakeholder consultative meetings and workshops. It is meant to be a "living" strategy that will be regularly evaluated and revised as necessary, based on performance against measurable strategic objectives.

Background

The Gambia is blessed with a magnificent coastline and the majestic River Gambia provides a backdrop for riverboat safaris and viewing wildlife such as hippos, monkeys and exotic birds. While sun, sea and sand tourism has been the backbone of the tourism economy for many years, eco and adventure tourism remains underexplored. Despite recent setbacks such as the Covid-19 and Ebola pandemics, The Gambia's tourism industry is on the path to recovery, supported by relaxed COVID-19 restrictions, stable political conditions, and increased tourism promotion. Government investments in infrastructure, including roads, ports, and energy projects, aim to enhance operational efficiency and effectiveness within the sector.

However, tourism development is hampered by inefficiencies in the enabling environment, limited air access, poorly diversified markets and products, highly seasonal demand dominated by charter operators and skills shortages in areas of experiential and sustainable tourism development, among other.

The Draft National Tourism Policy and Strategy (NTPS, 2023-2032) aims to consolidate the gains made, address existing and emerging challenges, and re-position the sector to render it more competitive, thereby enhancing its contribution to the national economy, employment, incomes and livelihoods of small-scale operators and returns on investments.

Since global tourism has recovered from the devastating effects of Covid-19, The Gambia is in a good position to capitalise on key global demand trends such as the growing preference for sustainable, outdoor and experiential travel, easier access to a variety of market segments through the growing power of new technologies, the value attached to personal safety and shifting market characteristics such as a growing preference for independent travel, a fast growing youth travel market and the high demand for affordable, value-for money experiences.

Current situation

An analysis of the current tourism situation reveals that tourism recovery has been lagging in the wake of Covid-19 and tourism arrivals have not yet recovered to 2019 levels. The situation is exacerbated by the consistent decline in demand from The Gambia's largest market, the UK. Various other source markets display a high proportion of non-discretionary visitors that come to visit friends and relatives. Leisure tourism demand is highly seasonal and is driven by charter operators for 5 months of the year. In addition, The Gambia is struggling to retain its price competitiveness in the sun, sea and sand segment and only a small proportion of visitors are currently attracted to the country by factors other than the beaches. Neighbouring Senegal has made rapid strides in wildlife and other forms of experiential tourism, with many Gambian visitor undertaking cross border excursions.

Yet, the River Gambia and its surrounds is a haven for bird lovers and ecotourists and could offer excellent opportunities for outdoor-active and cultural tourism experiences. In addition, the recently constructed Sir Dawda Kairaba Jawara International Conference Centre and the various conference facilities at major hotels offer substantial scope for increasing MICE tourism (Meetings, Incentives, Conventions and Exhibitions).

In summary, tourism demand is largely over-concentrated in the SSS (sun, sea, sand) segment and in a few source markets, making the sector vulnerable to external and internal events and market changes. The Gambia is to a large extent stuck in “Old Tourism” and the industry has not sufficiently kept pace with changing market preferences and segmented demand, competitor product innovations, technology-driven (e-marketing) opportunities and sustainability concerns. Product quality and recapitalization of facilities are affected by low margins resulting from the reliance on price sensitive and cost-driven charter tourism, with suppliers having major power over prices.

Key challenges to address include:

- Diversifying the tourism product range by expanding the range and quality of infrastructure and services for river tourism, nature and ecotourism; developing wildlife safaris and niche experiences; adopting targeted investment promotion measures; improved packaging of tourism experiences; applying sustainable and regenerative tourism management practices; developing skills and capacity to service experience seeking tourists; and ensuring visitor safety.
- Refreshing the destination brand and expanding the brand image to include areas and experiences beyond the coast and managing unwarranted perceptions about The Gambia.
- Stimulating demand through a coordinated air-access expansion strategy; broadening the destination marketing focus to include specialised and experience-focused tour operators and travel agents; re-imagining trade shows and building new trade and media partnerships; and investing heavily in digital marketing technologies and promotions.
- Strengthening institutional capacity and skills in GT Board; improving public-private marketing collaboration; and ensuring effective and efficient monitoring and statistical measurement of tourism.

Future vision and positioning

The marketing vision for 2030 is:

The Gambia to be widely celebrated for its balanced and accessible mix of quality, value-for-money coastal relaxation and immersive nature and cultural experiences along the River Gambia. Our commitment to sustainable tourism development will protect our environmental and cultural heritage and showcase our welcoming way of life, with tourism being a key driver of inclusive economic growth.

To achieve the vision and address the challenges highlighted above, the marketing strategy adopts a set of *key principles* that will direct proposed interventions, namely: diversifying products and demand and actively promoting experiences beyond beach relaxation; evolving the

destination brand and image to be more inclusive of all The Gambia’s resources; proactively promoting market-led investment along the River Gambia; alleviating tourism seasonality; capitalising on public-private marketing and investment partnerships; advocating for sustainable and regenerative tourism; pursuing a performance-based marketing approach and strengthening human resources in delivering experiential tourism.

In line with the marketing vision and principles, The Gambia will in future be positioned and promoted based on the full range and diversity of experiences offered and not only as a destination for sun, sea and sand tourism. It is recognised that the destination stands out from other destinations in Africa due the attractive blend of sunny beaches, natural beauty of the River Gambia, welcoming and rich cultural traditions, and rich history, which are all easily accessible within one or maximum two-day’s travel from the international airport.

Destination brand

Based on the diversified positioning, the brand positioning statement is:

“My smile welcomes you to explore life on Africa’s friendliest river, as it flows through our past and our present, dancing and singing to the strumming of a kora and the drumming of a djembe, beating like the wings of colourful birds, as it makes its way through our beautiful places to rest on our relaxing beaches.”

A punchy destination marketing slogan will be used to promote the brand promise, namely:

smiling coast, friendly river

The brand is visually represented by a new destination brand identity (logo).



The colour palette and a visual language derived from the logo colours will be applied in designing marketing materials, exhibitions stands, digital marketing platforms, brand apparel and other items.

Target markets and segments

The strategy acknowledges the importance of applying the bulk of marketing resources in markets that have strong growth and value potential and that are easier and less costly to convert to The Gambia. Through an objective evaluation process involving a set of measurable criteria, three sets of source markets will be targeted with varying approaches, namely:

- Core markets, which have higher growth potential and are easier and less costly to convert, namely the UK, Benelux, Germany and Spain. 60% of marketing resources will be applied in these markets.
- Leverage markets, which have more limited growth potential and are easier to convert, namely Scandinavia (Norway and Sweden), Portugal, Eastern Europe (Poland and Czech Republic) and Nigeria (with a substantial focus on MICE tourism). 25% of marketing resources will be applied in these markets.
- Invest markets, which have higher growth potential and are more difficult and costly to convert and will require time to render results, namely the USA (specifically the roots and diaspora markets), Italy, France and India. 15% of marketing resources will be applied in these markets.

The following market segments will be targeted during the strategy period (detailed profiling of each market segment is appended to the report):

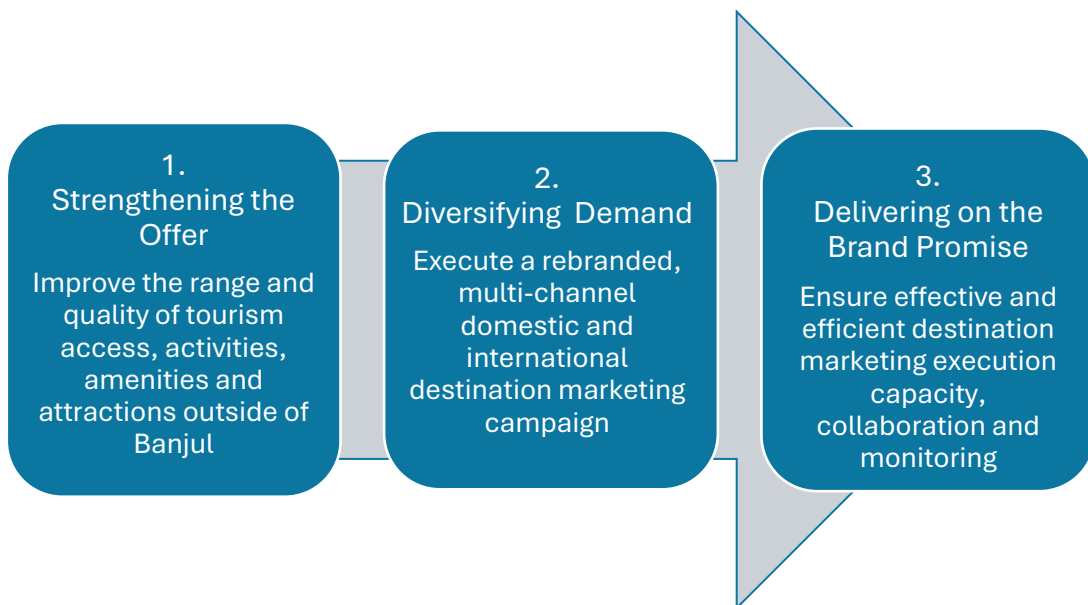
- *Packaged Explorers*: Cautious 'soft' exploration as part of a packaged group tour, visiting mainly the key cultural and historical attractions and sites.
- *Tailored Explorers*: Confident 'soft' exploration on a tailor-made itinerary, fulfilling the explorer spirit - it's partly about sharing the story. Want to delve deeper and veer off the traditional circuit based on personal preference. Organised trips in small parties, with some local interaction.
- *Intrepid Explorers and SAVE (Scientific, Academic, Volunteer and Education tourism) travellers*: Confident 'hard' exploration on a flexible, largely independent itinerary and in search of extraordinary experiences - prepared to sacrifice comforts and go the extra mile, to visit less frequented places and experiences. Includes those who travel to volunteer, learn, explore and support cultural and natural heritage preservation efforts and contribute to the improvement of local communities.
- *Inclusive and Packaged Beach Holidaymakers*: Desire to completely relax with all services provided, including beach and social activities, and possibly engaging in excursions around Banjul.
- *Domestic and Regional Breaks*: Citizens from The Gambia and neighbouring countries, taking short breaks to spend quality time relaxing and visiting key sites

- *Ecotourists*: A collective segment of leisure travellers who are intent on responsible travel to natural areas with a focus on experiencing, conserving and improving the environment, culture and well-being of the local people. These could include birders (major potential), anglers/fly-fishers, photographers, cultural and community-based touring.
- *Outdoor Active and Adventure Enthusiasts*: A collective segment of specialised niche adventurous outdoor sport enthusiasts, e.g. hiking/trekking, quad biking, cross-country and endurance running, motorcycling, off-road/4x4 rallies, climbing, paragliding, canoeing/ kayaking, wind/kite surfing. Always in search of new places to practice their interests.
- *MICE Delegates*: Delegates travelling to The Gambia for organised events, to meet and discuss with colleagues on issues of mutual concern in a professional and interesting environment with opportunities for local, high-quality experiences. Includes Gambian “roots” and diaspora who visit the country for purposes other than VFR, as well as those travelling to attend religious events.
- *Cruise Passengers*: Guests on cruise ships that stop-over in The Gambia enroute to Europe or Southern Africa.

The strategy lists specific product development opportunities to match the needs of the market segments.

Core marketing goals

Based on the challenges and opportunities identified in the situational analysis and the vision, marketing principles, objectives, brand framework and target market and product directives outlined above, the following 3 core goals will be pursued:



Growth strategies and actions

The following strategies and actions will be implemented in pursuit of the goals outlined above.

Goal 1: Strengthening the offer. Improve the range and quality of tourism access, activities, amenities and attractions

Strategy 1.1 Increase year-round air access capacity and affordability

- a) Re-activate and capacitate the Gambia Air Access Initiative (GAAI)
- b) Prepare and implement a three-year Route Development Strategy
- c) Develop a medium-term Air Access Plan
- d) Conduct and table for approval professional feasibility studies for priority initiatives in the approved Air Access Plan
- e) Establish a standing dialogue with existing and targeted partner airlines

Strategy 1.2 Package, present and promote attractions and experiences to match investor and target market requirements

- a) Establish formal protocols and tools for the coordination of tourism investment promotion and collaboration across agencies
- b) Assemble a targeted list of investment-ready tourism opportunities which align with the market development strategy
- c) Develop a targeted tourism investment strategy and well-resourced outreach plan to identify and attract specific investors for selected opportunities
- d) Develop collateral materials to support the tourism investment outreach plan
- e) Actively promote the investment-ready opportunities to the investment community in line with the agreed tourism investment strategy

Strategy 1.3 Adopt and promote sustainable, regenerative and community-based tourism

- a) Formulate and adopt sustainable tourism guidelines
- b) Strengthen capacity and knowledge in GT Board to promote and implement the sustainable tourism guidelines
- c) Launch a dedicated industry-wide sustainable tourism drive
- d) Support tourism businesses to join a suitable sustainability accreditation scheme
- e) Establish environmental management standards for tourism areas

Strategy 1.4 Improve river-based tourism facilities, services and experiences

- a) GT Board to establish a specialised role as River Tourism Product officer
- b) Prepare a River Gambia Tourism Strategy and Development Plan
- c) Develop infrastructure to facilitate access and enable river-based tourism

- d) Prepare a River Gambia Tourism Management Plan to manage tourism activities on the river
- e) Carry out research and feasibility studies for a range of potential day and overnight river cruise experiences
- f) Package prospective investment opportunities and promote these to targeted investors

Strategy 1.5 Develop new and improved nature-based tourism facilities, services and experiences

- a) GT Board to establish a specialised role as Nature-Based Tourism Product officer
- b) Establish Kiang West National Park as a fully developed wildlife park experience and visitor attraction
- c) Strengthen the visitor experience at selected existing nature-based locations
- d) Establish a national network of adventure trails to attract outdoor adventure markets

Strategy 1.6: Strengthen existing core products and experiences

- a) Establish an infrastructure upgrading and improvement program for the TDA
- b) Strengthen Gambia's birding products and support services
- c) Improve cruise infrastructure and support services

Goal 2: Diversifying demand. Execute a rebranded, multi-channel domestic and international destination marketing campaign

Strategy 2.1: Roll out the new destination brand

- a) Brand roll-out: Apply the brand to destination marketing and communication materials
- b) Build brand management capacity at GTB
- c) Promote brand adoption by all relevant stakeholders
- d) Brand benchmarking research

Strategy 2.2: Promote the #FindMySmile campaign among the travel trade

- a) Integrate #FindMySmile in trade marketing activities
- b) Develop a centralised trade portal
- c) Set up and maintain an international tour operator and agency database for email and social media communication
- d) Streamline trade show participation
- e) Implement targeted trade roadshows and workshops in key source markets
- f) Establish a programme of direct sales visits to strategic operators
- g) Create targeted shoulder season incentive programmes
- h) Arrange high-impact, targeted trade familiarisation trips

Strategy 2.3: Strengthen media engagement and PR in support of the #FindMySmile campaign

- a) Create a high-impact media kit
- b) Establish a structured media relations programme built around a comprehensive annual PR calendar

Strategy 2.4: Launch an intensive #FindMySmile digital marketing drive

- a) Rebrand and improve the destination website and CRM
- b) Produce and distribute relevant and on-brand digital marketing content
- c) Amplify #FindMySmile through dynamic social media marketing
- d) Leverage Marketing Partnerships and User Generated Content
- e) Engage influencers to bolster destination awareness and conversion
- f) Conduct email marketing
- g) Conduct targeted paid advertising
- h) Measure and monitor digital marketing performance
- i) Appoint e-marketing agency to support campaign implementation

Strategy 2.5: Promote The Gambia as a preferred Meetings, Incentives, Conventions, Exhibitions and Events destination

- a) Establish a dedicated national MICE desk in GT Board
- b) Implement a phased MICE promotion programme
- c) Develop and implement Gambia events strategy

Strategy 2.6: Launch the #SmileGambia domestic campaign to enhance domestic tourism awareness and travel

- a) Execute the #SmileGambia domestic travel promotion campaign
- b) Develop and execute the #SmileGambia schools tourism competition
- c) Execute the Smile Ambassadors Community programme
- d) Launch The Gambia Tourism Week and Awards Programme

Strategy 2.7: Launch a coordinated tourism crisis management initiative

- a) Establish a national tourism crisis management task force
- b) Develop and implement a suitable crisis communication and reputation management strategy
- c) Establish a tourism business continuity and recovery support programme during severe crises
- d) Set up a digital tourism crisis preparedness hub

Goal 3: Delivering on the brand promise. Ensure effective and efficient destination marketing execution capacity, collaboration and monitoring

Strategy 3.1: Strengthen the capacity of the GT Board

- a) Restructure the Marketing and Product & Investment Development Departments of the GT Board
- b) Recruit market-based representation agencies in priority source markets
- c) Improve the skills and capacity of GT Board to optimise marketing and investment promotion execution
- d) Strengthen investment promotion capacity and coordination
- e) Ensure sustainable and growth-oriented product development and destination marketing funding

Strategy 3.2: Strengthen private-public and public sector coordination and partnerships

- a) Establish the 'Team Gambia' partnership committee
- b) Establish an inter-governmental workgroup to strengthen marketing and investment promotion coordination within GT Board and with other MDAs

Strategy 3.3: Enhance the knowledge and skills of entrepreneurs and service providers to meet the needs of a diversity of travellers

- a) Establish a tourism innovation and entrepreneurship capacity building programme

Strategy 3.4: Improve monitoring and evaluation of the marketing strategy

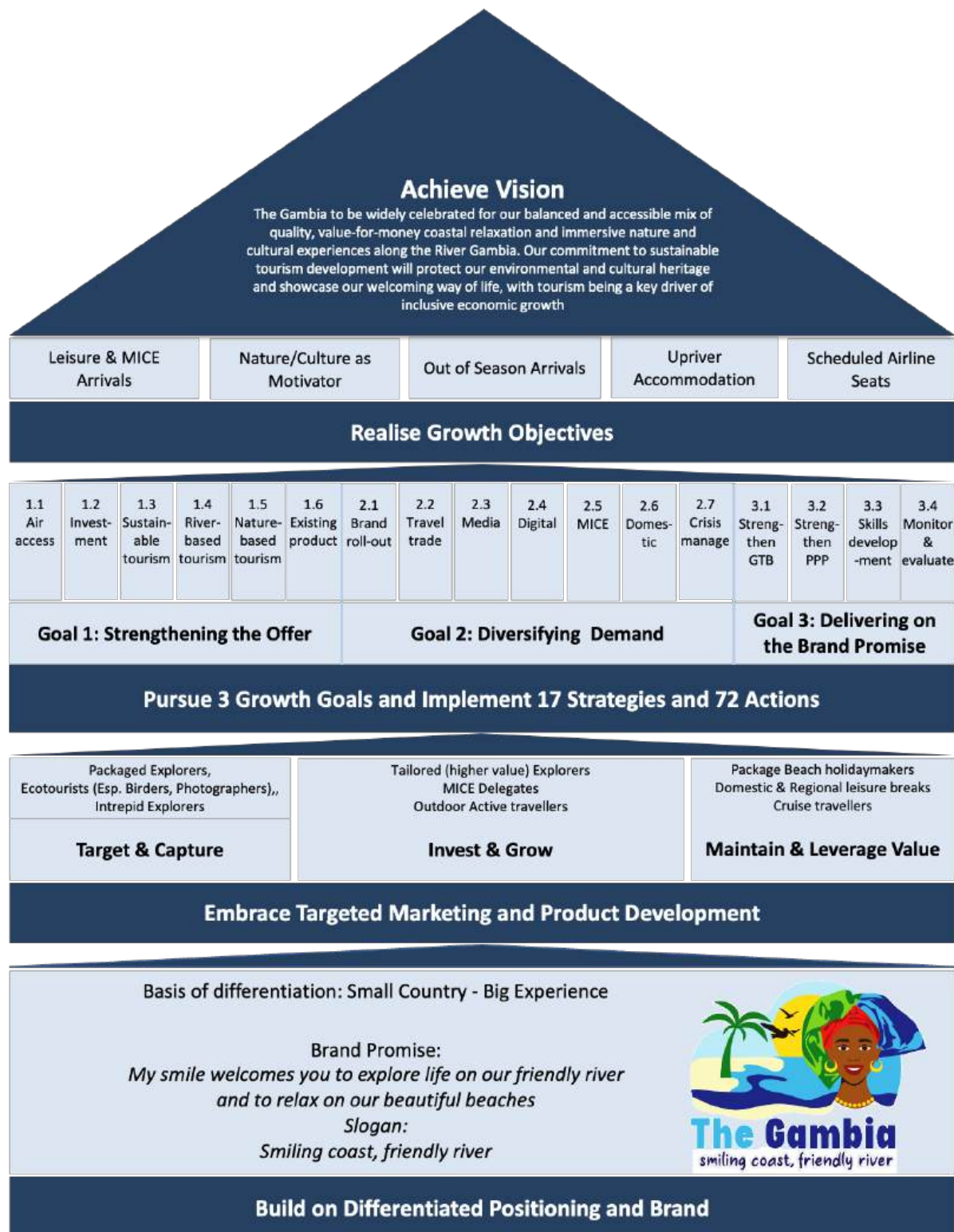
- a) Establish valid and reliable statistical measurement
- b) Measure and report on marketing activity outcomes and impacts
- c) Critically evaluate and update strategy on an annual basis and adapt as necessary

The 5-year strategic plan will be executed over 3 stages, namely:

- **Year 1 - Stage 1: Consolidation**, with a focus on “Laying sound demand and product foundations” for diversifying tourism demand and supply.
- **Year 2 and 3 - Stage 2: Escalation**, with a focus on “Driving market engagement and product enhancement” to ensure active demand and supply diversification.
Year 3 and 4 - Stage 3: Expansion, with a focus on “Achieving consistent high growth” to expand the scale and diversity of demand and supply.

This document is complemented by a detailed Implementation Action Plan, which indicates how the various strategies, actions and activities under each will be implemented over three stages, including budgets, responsibilities and performance indicators.

The strategic plan in a nutshell



1 Introduction

1.1 Background

The Government of The Gambia, in collaboration with the World Bank, is implementing the Tourism Diversification and Resilience in The Gambia Project (TDRGP), supported by IDA Investment Project Financing (IPF). The project will be executed over five years with the following aims:

- i Strengthening institutional and policy frameworks to support the implementation of The Gambia’s Draft National Tourism Policy & Strategy 2021-2030.
- ii Enhancing market linkages with large tourism operators, capabilities and access to funds for tourism-related Micro, Small, and Medium-sized Enterprises (MSMEs).
- iii Building resilience through sustainable coastal infrastructure and rehabilitation of existing tourism sites.

Under i) above, TDRGP has commissioned the formulation and initial implementation of an integrated, five-year destination marketing, branding and investment promotions strategy and action plan, which is the subject of this report.

The objective is to develop a “living” national tourism marketing and brand strategy and action plan that can be updated on an ongoing basis, based on performance-based marketing and management processes that rely on quality data and research results, provided through the National Tourism Statistics System. In addition, the rules and a methodologies used for prioritising source markets, target market segments, and devising investment allocation decision-making processes should be applied in future.

The report will guide the marketing of tourism for the next five years and includes a five-year action plan with corresponding activities, tactics, targets and budgets.

1.2 Strategy process and methodology

Thorough inception, situational review and stakeholder validation processes preceded the formulation of this strategy document.

Preparation of the situation analysis reports entailed an intensive field visit to all major tourism sites and attractions, in-depth tourism stakeholder interviews, three interactive stakeholder workshops, desk research and analysis of all available and relevant policies, plans, strategies, an online survey among leading tourism influencers, personal interviews with relevant international tour operators, detailed website and digital media analysis and a benchmark study of major tourism competitor and comparator destinations. The resultant Inception Report¹,

¹ Government of The Gambia (2024), Tourism Marketing Strategy Development and Implementation, Tourism Diversification in The Gambia Project (TDRGP), Inception Report.

Marketing and Branding Situation Analysis Reports²³ and Investment Promotion Report⁴ are available at the Ministry of Culture and Tourism.

Based on the findings of the situational analysis, draft strategy concepts were drafted and consulted with a representative group of stakeholders, during three stakeholder validation workshops, including:

- Brand strategy validation workshop: a shortlist of destination positioning directions, brand identities (logo designs) and brand slogans were presented, and stakeholders were given the opportunity to prioritise these. The brand strategy validation workshop was preceded by 3 virtual focus group discussions, where a core team of 10 public and private sector tourism leaders narrowed down branding options, for presentation to a wider group of stakeholders at the validation workshop. The results are included in a separate Brand Strategy document and the core brand strategy outcomes are integrated in this document.
- Marketing strategy validation workshop: draft strategy elements including a marketing vision, principles, measurable success indicators (upon which the marketing objectives are based), target market segments, key marketing goals and supportive strategies were presented, and stakeholders were given then opportunity to review these and suggest additions and changes. The Marketing Strategy and implementation plan presented in this document accommodates these suggestions, where appropriate.
- Investment strategy validation workshop: a long list of potential investment opportunities for diversifying tourism was presented and stakeholders were given the opportunity to review and prioritise these, with the objective of coming up with a shortlist of investment opportunities. The results will be included in a separate Investment Strategy document which will follow the finalization of this strategy. The core proposals are integrated in this document.

1.3 Overview of destination The Gambia

The Gambia, one of the smallest countries in Africa and known as the ‘*Smiling Coast of Africa*’ for its friendly people and glorious landscapes, sits on the extreme coastal edge of the western bulge of the African continent and is bordered by Senegal to the north, south and east. The country has a youthful population, with 55% of its just over two million residents being under 25 years old. The country’s GDP stands at just over US\$ 2 billion (World Bank, WDI 2022), and its literacy rate is 50%. The Gambia has a high fertility rate of 4.75%, and over 70% of households engage in farming. Its ecosystem is centred around the River Gambia, which traverses the entire country and drains into the Atlantic Ocean.

Although the country has been impacted by high volume, resort-based tourism, The Gambia could appeal to various market segments due to its diversity. Its cultural assets remain largely untouched, and the destination’s natural assets are relatively pristine, comprising palm-fringed

² Government of The Gambia (2025), Tourism Marketing Strategy Development and Implementation, Tourism Diversification in The Gambia Project (TDRGP), Report 2: Situation Analysis Marketing And Branding, Volume 1: Core Report.

³ Government of The Gambia (2025), Tourism Marketing Strategy Development and Implementation, Tourism Diversification in The Gambia Project (TDRGP), Report 2: Situation Analysis Marketing And Branding, Volume 2: Appendices.

⁴ Government of The Gambia (2025), Tourism Marketing Strategy Development and Implementation, Tourism Diversification in The Gambia Project (TDRGP), Report 3: Situation Analysis, Investment Promotion.

beaches at such places as Kotu, Kololi and Bijilo, which attract sunworshippers and water sport enthusiasts. Inland, the River Gambia courses through the country, providing a backdrop for riverboat safaris and wildlife viewing, including hippo, monkeys and exotic birds. The country also has several natural reserves, such as the Tanji Bird Reserve and the Niimi National Park, enhancing its potential as an ecotourism destination.

The transatlantic slave trade is a deeply etched characteristic of Gambia's history, with Kunta Kinteh Island standing as a significant historical site. The country's rich culture of traditional music and dance, festivals and entertaining rituals all contribute to its appeal.

Tourism is The Gambia's lifeblood, bringing out the best and the worst of the 'new' tourism economy, (e.g., negative perception related to sex tourism, poorly integrated tourism value chain and other factors).

The country's location on the ocean, pristine beaches, ideal climate and diverse ecosystem makes it a popular tourist destination in West Africa, particularly for Europeans seeking to escape the harsh northern winters. The Gambia promises the classic '*sun, sand and sea*' experience, complemented by its friendly people and natural beauty.

Eco and adventure tourism present underexplored, potentially highly viable niche markets. River transport and activities offer major untapped opportunities in tourism, with the navigable River Gambia providing potential for commercial hubs along its banks. Home to more than 550 bird species and a major hub along seasonal migratory pathways along the Palearctic region, The Gambia is a perfect destination for birdwatching.

The tourism sector is a major contributor to the national economy, accounting for about 20% of the country's GDP. The sector is one of the fastest-growing industries, creating over 35,000 direct jobs, and 40,000 indirect jobs, earning the country over US\$ 85 million in foreign exchange and US\$ 45 million in foreign investments.

The industry is primarily seasonal, with peak tourist arrivals during the Northern Hemisphere winter, while also avoiding The Gambia's rainy season from June to September. Average hotel occupancy reaches 90% in winter months but drops to around 25% during the rest of the year. While Western Europe remains the most important source market, regional tourism from West Africa is growing, due to the emergence of a regional upper middle class.

The Gambia holds a considerable comparative advantage in tourism due to its proximity to Europe, year-round tropical weather, English-speaking population, fair prices, political stability and its welcoming and hospitable people.

However, it faces competition from destinations offering superior quality infrastructure, superior air access, a more diversified product mix, and lower prices. Tourism development is also hindered by:

- A poorly developed and challenging enabling environment and critical capacity shortages.
- Significant limitations on air access, including schedules and associated costs.
- Lack of competitiveness and focus on product offerings, which could benefit from targeting specific affinity groups such as ecotourism and adventure tourism.
- Ineffective country branding and marketing to compete with top-tier tourist destinations in Africa and Europe.

- Insufficient funding for product development and marketing initiatives.
- Inadequate training to enhance skills capacity for conducting surveys, collecting, analysing, and disseminating statistics (which is being addressed as part of establishing a Tourism Satellite Account (TSA)) .
- Limited skills in using demand profiling to tailor products to demand, identify primary and priority target markets, and to develop appropriate marketing strategies accordingly.
- Lack of effective implementation of policies, strategies and plans and a focus on tourism development and marketing actions undertaken rather than outcomes achieved.

The tourism sector has experienced several shocks in the last 10 years, resulting in significant contraction. These include:

- The Ebola epidemic in West Africa (2013-2016).
- The political impasse following the 2016 presidential elections (December 2016/January 2017).
- The bankruptcy of the Thomas Cook Group, a tour operator responsible for about 40% of The Gambia's annual visitors.
- The COVID-19 pandemic, which restricted travel and curtailed tourism activities globally. COVID-19 led to the closure of many businesses, including hotels. According to the GT Board, the Gambian Tourism industry lost US\$ 108 million in 2020 and a further US\$ 57.9 million in tax revenue due to these closures. There was a 41% decline in tourist arrivals in 2021.

Despite these setbacks, The Gambia's tourism industry is on the path to recovery, supported by relaxed COVID-19 restrictions, stable political conditions, and increased tourist arrivals. Government investments in infrastructure, including roads, ports, and energy projects, aim to enhance operational efficiency and effectiveness within the sector.

1.4 Tourism policies and plans that impact the marketing strategy

While the tourism sector has been the subject of a number of policy and planning processes during the past two decades, the following documents have a major bearing on this marketing, branding and investment promotion strategy.

1.1.1 Recovery Focused National Development Plan (RF-NDP) 2023-2027

The current National Development Plan envisions consolidating democratic governance gains, accelerating green economic and social transformation, and building resilience to shocks and crises. This is guided by three strategic objectives:

- Resilience to shocks and crises: Strengthening households and communities to counter climate-related and economic shocks.
- Governance and development gaps: Addressing critical gaps to bolster governance, economic and social development.

- Accountability and partnerships: Enhancing accountability, establishing partnerships, and mobilising sustainable resources for effective development delivery.

Under Outcome 3.3, "A competitive and diversified tourism sector contributing to overall inclusive growth, job creation and poverty reduction", the Recovery Focused National Development Plan (RF-NDP) 2023-2027 outlines specific tourism Programme Priorities and Interventions.

These included the need for a clear legal and regulatory framework to address overlaps and conflicts with existing laws affecting tourism; the importance of diversifying tourism products to include cultural, ecotourism, wellness, and sports tourism; development of a modernised, interactive marketing strategy that leverages social media, partnerships with influencers, and the promotion of prominent Gambians as brand ambassadors; as well as various cross-cutting measures to address integrated air and travel facilitation, climate resilience, sustainable waste management, and strengthened data collection to support informed decision-making and effective policy implementation.

1.1.2 Draft National Tourism Policy and Strategy (2023-2032)

The Draft National Tourism Policy and Strategy (NTPS, 2023-2032) is a successor to the previous policy (1995-2000) and serves as the main framework that will guide the development of the industry over the next 10 years. It aims to consolidate the gains made, address existing and emerging challenges, and re-position the sector to render it more competitive, thereby enhance its contribution to the national economy, employment, incomes and livelihoods of small-scale operators and returns on investments.

Prior to drafting the tourism policy and strategy, the Ministry commissioned a comprehensive diagnosis of the sector to serve as the foundation for, and to inform the new policy and strategy.

Part 1 of the document outlines the vision and mission, guiding principles and overall goal and objectives for the sector, as follows.

Vision: By 2030, The Gambia with its friendly and hospitable people, unique flora and fauna and the majestic River Gambia, is a prime destination of choice for a sustainable and responsible tourism that encompasses valued experiences of natural and cultural heritage, wellness, quality products and services.

Mission: To expand and diversify tourism markets and products such as The Gambia river, natural, arts and culture heritage, environmental assets and wellness and sports, with the view to inclusively increase economic gains through sustainable tourism practices and regulations and fostering public-private partnership and an enabling environment for the benefit of the environment, businesses and the people.

Values: A tourism industry based on the values of tolerance, ethics, gender sensitivity, diversity, mutual respect, partner collaboration, effective communication, accountability and transparency.

Guiding principles: Apply a holistic approach to tourism; use sustainability standards to develop the industry; collaborate in destination management (government, private sector and civil society); choose quality over quantity; demand fair tourism income distribution; reduce tourism's economic, social and environmental burden; redefine economic success to include small business development, distribution of incomes, and enhancement of sustainable local

supply chains; mitigate climate impacts; close the loop on resources and promote circular resource use; contain tourism's land use and retain geographical character; diversify source markets to be more resilient in the face of crises; protect sense of place including destination identity and distinctiveness.

Goal: To enable private sector-led tourism by ensuring that the policy and regulatory environments in The Gambia support the innovation and growth required to transform tourism to a competitive, environmentally sustainable and high-value/high-impact tourism that enhances contribution to the economy, livelihoods, security and returns on investments.

Objectives: To use the policy as a springboard to catalyse the safe and sustained recovery of the tourism sector from the ravages of COVID-19; and to ensure that the foundations for a vibrant, and competitive tourism sector are laid to assure long-term growth and sustainability, the following policy and strategy is formulated in pursuit of the following five policy objectives:

- i) Put in place appropriate policies, legal and regulatory frameworks, and develop human and institutional capacities for a competitive and vibrant tourism sector based on environmental, social and economic sustainability.
- ii) Develop and market attractive tourism products and services for domestic, regional and international visitors drawing upon market demand from the country's culture, heritage and natural resource assets.
- iii) Develop and implement dynamic and carefully targeted, performance-based measures to market destination Gambia, and ensure high quality and standards for a competitive and safe Tourism Destination.
- iv) Strengthen cross-cutting services to adequately support the growth, development and transformation of the tourism industry.

The goal and objectives outlined above are closely linked to the National Development Plan (2018-2021) and the SDG Goal 8.9: "creating an enabling environment to devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products."

Part 2 focuses on measures to address the objectives. In respect of objectives 3 and 4, i.e., the objectives dealing with product development and marketing, the document covers eight Policy Priority Areas (priority areas 7 – 14), each with specific strategies and policy interventions. These include

- *Policy Priority Area 7: Product Expansion and Deepening:* The approach here is to broaden and deepen the range of tourism products by focusing on developing niche markets and adding value to current offerings.
- *Policy Priority Area 8: Tourism and Culture:* This area promotes cultural heritage tourism by integrating local culture, history, and traditional knowledge into tourism experiences.
- *Policy Priority Area 9: Domestic Tourism:* To increase domestic tourism, efforts include promoting destination awareness and fostering pride in national tourism resources.
- *Policy Priority Area 10: Enhancing Hospitality Services:* Quality in service delivery is essential, and this area targets training to improve hospitality standards.

- *Policy Priority Area 11: Capitalising on Global and Regional Tourism Trends:* This priority area seeks to align The Gambia's tourism with global trends, such as wellness tourism, ecotourism, and experience-based travel.
- *Policy Priority Area 12: Destination Marketing and Market Diversification:* This area aims to broaden The Gambia's market reach by targeting diverse international markets and investing in digital marketing campaigns. It also promotes partnerships with travel agencies and tour operators in emerging markets, along with efforts to reposition The Gambia as a premier tourism destination.

The main strategies in this priority area focus on implementing a dynamic five-year marketing strategy, conducting market research, and leveraging both local and international partnerships to attract diverse visitor segments.

- *Policy Priority Area 13: Promoting Use of Online Technologies:* The main strategy centres on developing a comprehensive, integrated e-marketing plan to bolster the visibility and digital reach of The Gambia as a tourist destination. Further, the policy highlights the importance of co-marketing partnerships within the tourism industry, empowering the e-marketing unit in GT Board and securing a consistent budget are prioritised to sustain effective digital campaigns and initiatives
- *Policy Priority Area 14: Ensuring Quality in Tourism:* By implementing consistent inspection and classification of facilities, alongside strict health and safety protocols, the policy aims to maintain high service standards and improve the overall experience for tourists. It also focuses on strategies and interventions to address environmental, waste management, and climate change issues.

The NTPS identifies 10 macro-level key performance indicators that will be used to assess the overall success in implementation by 2032, as shown in Table 1 below. Many of these performance indicators have a direct bearing on the objectives of the marketing, branding and investment promotion strategy.

Table 1 Tourism KPIs and targets set by the NTPS

Macro Level Performance Indicator	Baseline	Target
International Tourism Arrivals	209,000	549,123
Domestic Tourists	N/A	200,000
Hotel Bed stock	9,000	27,000
Employment	Direct: 41,700 Indirect: 110,000	Direct: 100,000 Indirect: 200,000
Foreign Direct Investment (FDI)	US\$ 15.8 million	Additional US\$ 3.2 million (2% annual growth)

Macro Level Performance Indicator	Baseline	Target
Foreign Exchange Earnings (US\$ millions)	US\$ 85 million	US\$ 170 million
Contribution to GDP (%)	Direct: 8.5% (US\$ 98 million) Indirect: 20.5 (US\$ 200 million)	Direct: 15% Indirect: 25
Average expenditure per visitor per visit	US\$1,682.24 (7,123 GMD per night * 16 nights)	US\$2,100 (25% increase)
Number of hectares of protected areas under improved conservation	Total area available: 76,064 hectares (6.4% of terrestrial lands)	62,384 hectares* under improved conservation
Number of natural and cultural heritage sites identified and tendered for Joint Venture, PPP, and Public-Private Community Partnership managed	63 sites of interest identified	18 sites with established JVs, PPPs, or PPCPs

**Including Kunkilling Forest Park (142 hectares). Community Forest Parks are not included in the Baseline.*

2 Marketing challenges and opportunities

1.5 Global and regional tourism market trends and implications for the marketing strategy



According to the United Nations World Tourism Organization (UN Tourism)⁵, following the devastating impact of the COVID-19 pandemic, international arrivals (overnight visitors) worldwide reached 99% of 2019 levels in 2024, reflecting an almost complete recovery of pre-pandemic numbers. An estimated 1.4 billion international tourists (overnight visitors) travelled internationally during this period.

Figure 1 Change in Tourism Arrivals, 2022, 2023 and first 7 months of 2024, over 2019

The following are global market trends of relevance to The Gambia, as highlighted by UN Tourism⁶, Skift⁷, Booking.com⁸, Intrepid Travel⁹ and others.

Table 2 Global market trends and implications for The Gambia

Global trend	Implications for The Gambia’s marketing strategy
<p>Growing preference for sustainable, outdoor and experiential travel</p> <p>Sustainable travel awareness is growing rapidly in a world increasingly faced by global warming, social and environmental disasters and destruction.</p> <p>Growing numbers of travellers avoid destinations that face “overtourism” and there is a growing preference for outdoor experiences, low-impact destinations and socially responsible travel.</p> <p>Travel as a means of personal growth, reflection and wellness is increasing.</p>	<ul style="list-style-type: none"> Positioning and branding The Gambia as a sustainable and responsible tourism destination. Encouraging and promoting interactive, authentic and personalised nature, cultural and culinary experiences. Developing good interpretation and storytelling skills. Promoting The Gambia as a destination for personal discovery, growth and wellness. Adopting responsible tourism management practices including community inclusivity, regenerative tourism and green technologies.

⁵ UN Tourism (2024) World Tourism Barometer, May 2024 and September 2024

⁶ <https://www.unwto.org/publications-on-tourism-market-intelligence>

⁷ <https://skift.com/2024/12/20/what-are-the-travel-industrys-biggest-challenges-going-into-2025/>

⁸ <https://news.booking.com/latest-bookingcom-sustainable-travel-data-reveals-ongoing-challenges-for-consumers--highlights-a-heightened-opportunity-for-cross-industry-collaboration/>; <https://www.statista.com/chart/32515/influencing-factors-on-european-traveler-destination-decisions/>

⁹ <https://www.intrepidtravel.com>

Global trend	Implications for The Gambia's marketing strategy
<p>Technology as a demand driver</p> <p>Advances in mobile and other travel and payment technologies are major drivers of travel demand and behaviour, with increasing numbers of visitors preferring to plan, book, pay for, evaluate and communicate their travel experiences online.</p> <p>Remote working is on the rise, with increasing numbers of travellers preferring to work remotely (“digital nomads”) and applying new technologies to combine work or business and leisure travel as “workcations”.</p>	<ul style="list-style-type: none"> • Continuously enhancing global Internet and mobile connectivity and encouraging visitor online interaction throughout the destination. • Promoting the adoption of innovative technologies for travel planning, booking and payment processes. • Maximising the use of digital media throughout the visitor journey. • Building a high-quality website with links to other international and influencer sites. • Blending online and traditional promotional tactics in destination marketing strategies and activities.
<p>Personal safety is key</p> <p>Longer-haul destinations that offer safe and healthy travel environments and the ability to effectively manage and deal with crises are favoured by travellers, due to increased travel risks brought about by global conflicts, disruptive climatic events, health crises, crime incidents and other safety risks. This is especially important when considering new trends such as all-women trips and family travel.</p>	<ul style="list-style-type: none"> • Ensuring hygienic and health-conscious tourism management and facilities. • Strengthening collaboration and coordination in the tourism sector and with health and safety authorities. • Strengthening tourism-focused safety initiatives, technologies and capacity. • Activating a crisis management and communication strategy.
<p>Shifting market characteristics</p> <p>Independent and tailor-made travel is gaining preference, especially among well-travelled international travellers.</p> <p>The value of domestic tourism is increasingly acknowledged, as the bedrock of sustainable tourism growth.</p> <p>Given significant increases in international flight and hotel prices during the past two years, value-for-money in air tickets, hotels, and tourism products have become major drivers of destination choices.</p> <p>Millennial and Generation Z (youth) travel is a fast-growing market force.</p> <p>Planning and booking times are becoming shorter, with travellers preferring destinations that are easily accessible at relatively short notice.</p>	<ul style="list-style-type: none"> • Working with airlines and tour operators to improve scheduled and flexible international air access to The Gambia. • Lobbying for affordable, easily obtainable and, where appropriate, visa free access for key target markets and segments. • Promoting domestic tourism and travel awareness. • Providing travellers with easily obtainable and accessible planning, booking and payment opportunities in main market languages. • Improving multi-lingual reception, guiding, transport and other services for independent international travellers. • Encouraging adventure experiences and experiential attractions for younger travellers. • Promoting The Gambia as a value-for-money destination for all budget levels and developing

Global trend	Implications for The Gambia's marketing strategy
<p>Family and intergenerational travel is on the increase with tourism providing opportunities for families to bond in a fast-paced world.</p> <p>Women-only travel is on the rise.</p> <p>There is an increasing focus on universal access as travellers get older and the disabled have access to new technologies.</p>	<p>suitable tourism activities and services to cater for all generations.</p> <ul style="list-style-type: none"> Enhancing Universal Access to cater for less mobile and older travellers.

At a regional level most ECOWAS countries experienced strong growth in arrivals from 2015 to 2019, following a period of slow growth mainly due to the Ebola virus of 2013 and 2014. Unfortunately the COVID-19 pandemic had a devastating impact on tourism arrivals in 2020, with annual arrivals plummeting three to fourfold in most countries. While exact statistics regarding tourism recovery in the region are limited, preliminary figures suggest that tourism arrivals will largely recover to, or even surpass, 2019 arrival numbers in 2024.

1.6 The Gambia market performance and profile

Tourism is by far the biggest economic sector in The Gambia. According to The Gambia Investment and Export Promotion Agency (GIEPA, 2022), the sector contributed 21% to the GDP, accounted for 48% of The Gambia's exports and sustained more than 115,000 jobs in 2019. It is therefore of utmost importance that the performance of the tourism sector is continuously measured and assessed, and that tourism policies and strategies are timeously adapted to capitalise on global and regional trends.

The following section presents a summary of the status and historical trends of tourism demand in The Gambia.

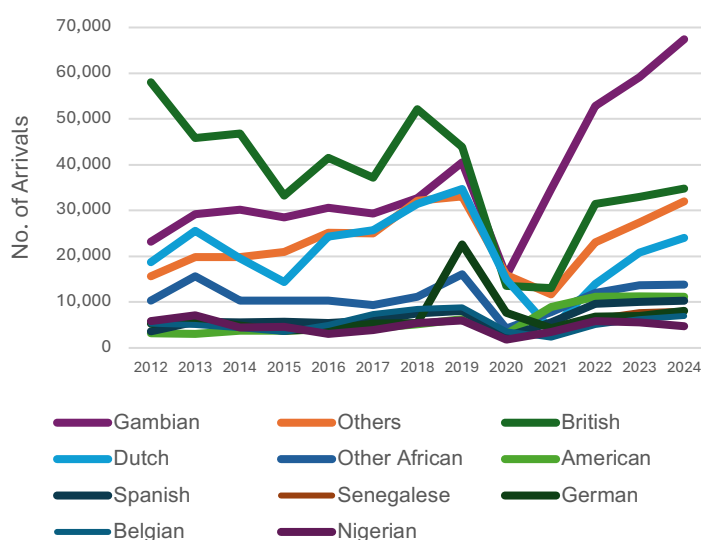


Figure 2 Arrivals from key source markets, 2012 – 2024

Post COVID-19 tourism arrivals from all key markets lagged behind 2019 levels at the end of 2024, with 226,657 arrivals compared to 235,789 in 2019.

The UK's share of total arrivals has reduced from 32.1% in 2012, to 18.6% in 2019 and to 15.3% in 2024, almost half of that in 2012.

Arrivals from the Netherlands grew significantly between 2012 and 2019 but have struggled to recover after Covid-19.

Arrivals from Spain have shown growth throughout the past decade, with 48% of visitors visiting friends and family.

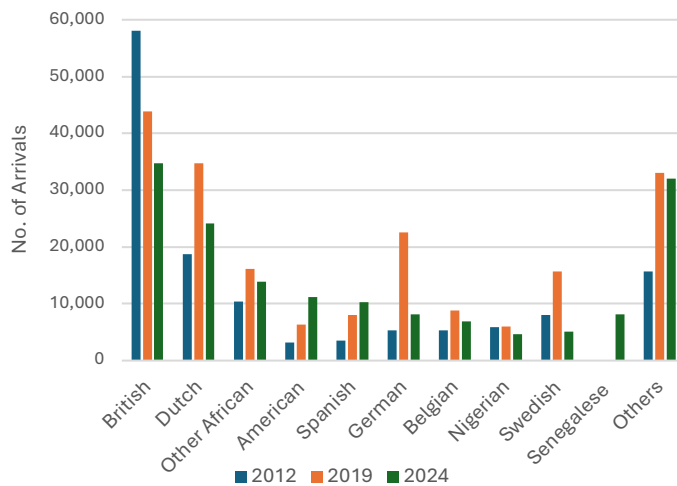


Figure 3 Numbers of arrivals by air from key source markets: 2012, 2019 and 2024

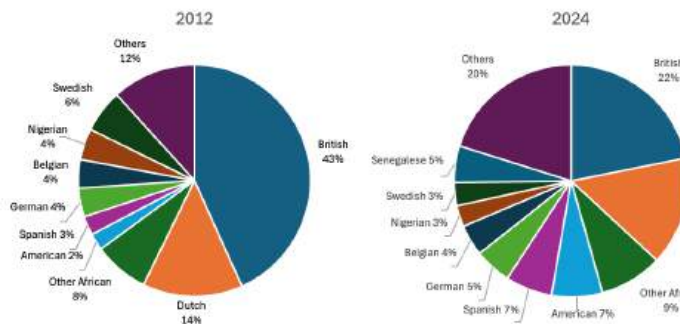


Figure 4 Market shares of air arrivals of key inbound markets, 2012 and 2024

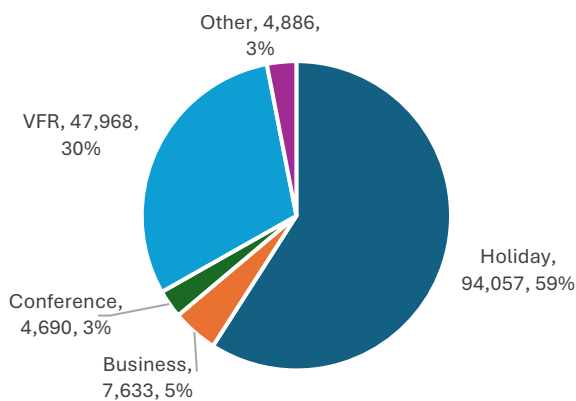


Figure 5 Purpose of visit of arrivals by air (excluding Gambians), 2024

Arrivals from African countries grew significantly from 2017 to 2019 and had recovered to 86% of 2019 values in 2024, driven largely by business and conference tourism.

Arrivals from Germany quadrupled to more than 22,600 in 2019 but were back to around 8,000 in 2024. Arrivals from Belgium and Sweden have equally struggled to recover after COVID-19 pandemic.

Arrivals from the Americas, albeit small, grew consistently to more than 11,000 in 2024, with just over 2,600 travelling for leisure.

Almost 60% of arrivals by air (excluding Gambian passport holders) visited for holiday purposes, bringing the total number of holidaymakers to 99,647 in 2024.

Two source markets, namely the UK and the Netherlands, produced 48% of all holiday arrivals to The Gambia in 2024 with 72% and 94% of visitors from these two countries respectively, citing holiday and leisure as their purpose of visit.

A significant proportion (29.9%, 50,372) of foreign visitors (excluding Gambian passport holders) came to visit friends and family, while only around 8,415 foreigners visited The Gambia for business purposes. Only 3% of air arrivals (4,846) came for conferencing purposes.

The limited business and conferencing market may be a key reason for the limited number of scheduled flights and the reliance on chartered flights.

A small number of source markets are drivers of leisure

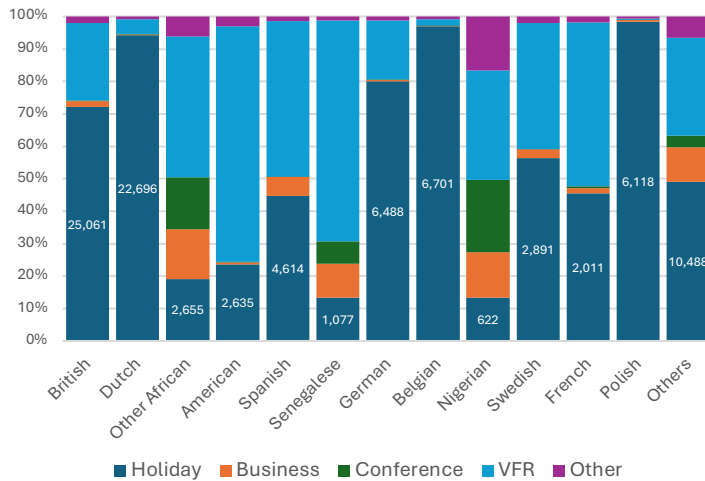


Figure 6 Purpose of visit of visitors from key source markets, 2024

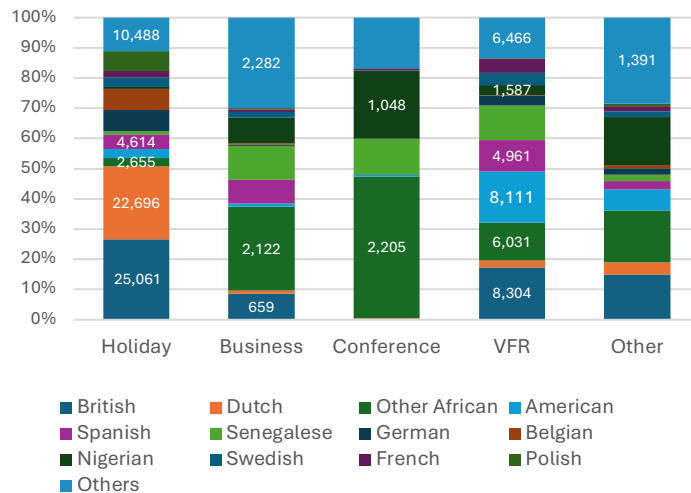


Figure 7 Breakdown of purposes of visit by key source markets, 2024

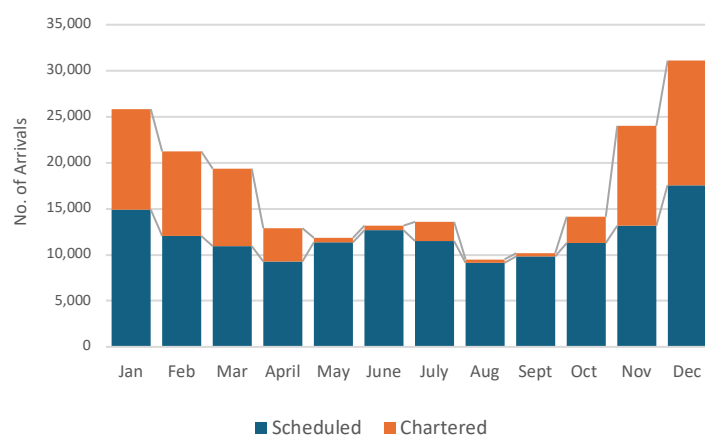


Figure 8 Arrivals by scheduled and chartered flights, 2023

(holiday) tourism. More than 72% of arrivals from the UK (25,061) visited for holiday purposes.

Arrivals from the Netherlands and Poland composed of a very high proportion of holiday visitors, with 94% of Dutch arrivals (22,696) and 98% of Polish arrivals (6,118 persons), travelling for holiday purposes in 2024.

Fewer than 50% of Spanish (4,614; 44.7%) and French (2,011; 45.4%) arrivals visited for holidaymaking. Only around 23% of Americans (2,635 persons) cited holidaymaking as their purpose of travel.

A substantial proportion of air arrivals from Africa (Nigeria, 34% and rest of Africa 43.5%) cited VFR as their purpose of visit, with a substantial 22% of visitors from Nigeria (1,048) and the rest of Africa (2,205) visiting to attend conferences. **Error! Reference source not found.** demonstrates the high tourism seasonality experienced in The Gambia. Almost 60% of arrivals by air in 2023 travelled to The Gambia during the five-month high-season period from November to March.

Arrivals in August were almost 70% lower than in December, and those in September were more than 60% down compared to January.

More than 50% of visitors from markets with a high incidence of VFR visitation, such as Norwegian, German, French and Spanish, stayed longer than 30 days. Visitors from markets with a high incidence of holiday travel, such as Dutch, British and Belgians, stayed mostly shorter

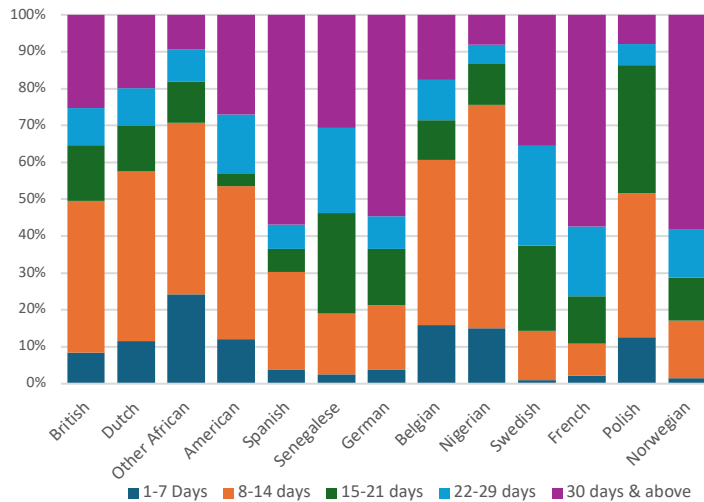


Figure 9 Average length of stay of visitors from key source markets, 2024

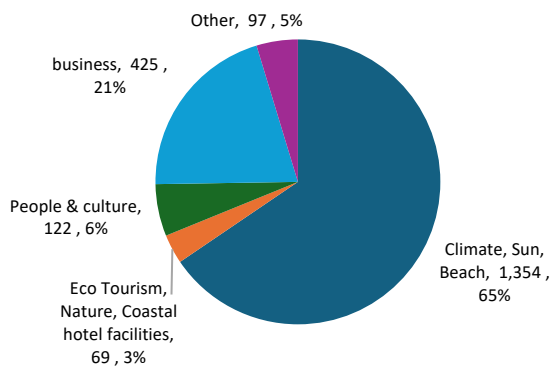


Figure 10 Factors that attracted visitors to The Gambia, 2023

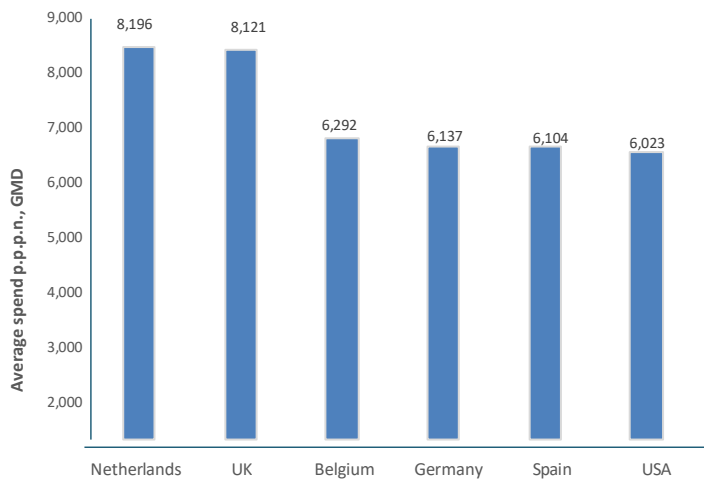


Figure 11 Average visitor expenditure per day by key source markets, 2022

periods. Visitors from Nigeria and the rest of Africa, who visit The Gambia mainly for business and conferencing, stayed mostly up to 14 days.

66% of respondents of the 2023 visitor survey indicated that they were attracted by the climate, sun, and beach, 21% visited for business tourism purposes, while “people and culture” and “ecotourism and nature” accounted for only 6% and 3% of factors cited.

In 2022 (latest available expenditure figures) the average expenditure of all tourists visiting The Gambia (excluding international airfares and foreign operator commissions) was GMD7,123 (US\$ 106) per night. Business and holiday visitors spent the most per day (US\$ 122 and US\$ 117 respectively), while VFR tourists spent the least per day (US \$78), although they stayed the longest.

Tourists from the USA (with a high proportion of VFR visitors) spent the least per day (US\$ 89) and those from the Netherlands and the UK spent around US\$ 30 more per night than tourists from Belgium, Germany, Spain and the USA.

Tourists from Africa (with a high proportion of business and conference visitors) spent an average of US\$ 116 per night.

Statistical reports of visitor patterns in 2018, 2019 and 2022 present a very high repeat visit rate, indicating that between 65% and 75% of visitors had previously visited The Gambia.

1.7 Marketing Strengths, Weaknesses, Opportunities and Threats (SWOT)

The following SWOT analysis presents a snapshot of marketing challenges and opportunities.

Strengths	Weaknesses
Product	
<ul style="list-style-type: none"> • Africa's most navigable river with significant tourism potential • English-speaking destination, facilitating easy communication • Good coastal hotel infrastructure in key areas • Welcoming local culture ("The Smiling Coast of Africa") • Rich bird watching opportunities with over 540 species • Cultural authenticity and heritage sites • Substantial conferencing facilities and capacity • Excellent, spacious beaches • Various proclaimed parks and conservation areas • Year-round good climate, particularly appealing for winter sun breaks • Good food offer, with various tasty local dishes that appeal to international tastes • New Sir Dawda Kairaba Jawara International Conference Centre, with 1,000-person capacity; and large conference facilities in various hotels • Historic roots appeal in terms of slavery and colonialism 	<ul style="list-style-type: none"> • Limited variety of nature and culture tourism activities and experiences • Aging hotel stock requiring renovation • Lack of international hotel brands • Littering and poor waste management in some tourism areas • Lack of an internationally acknowledged culture of sport event(s) • Poorly developed and environmentally neglected national parks • Limited eco-friendly accommodation of a good standard, especially along the river and in protected areas. • Poorly developed local tourism supply chain and high importation of e.g. quality and affordable food fresh produce, hospitality furnishings, maintenance services, etc. • Limited availability local tour guiding services beyond birding guides
Place (distribution mechanisms & channels)	
<ul style="list-style-type: none"> • Short flight time and same time zone as Europe (six hours from major markets) • Well-established ground handling operators and infrastructure • Strong existing relationships with major European tour operators • Among the most open visa regimes Africa 	<ul style="list-style-type: none"> • High flight costs and limited air connectivity • Poor "last-mile" road infrastructure to connect key tourism sites • Insufficient water-based tourism infrastructure, especially boat mooring and boarding jetties • Limited number and variety of local DMCs and specialised guides (except for birding) • A small number of Destination Management Companies (DMCs) and ground handlers dominate the market • Few international operators who sell Africa are acquainted with The Gambia

Strengths	Weaknesses
Promotion	
<ul style="list-style-type: none"> • Strong repeat visitor base (approximately 50%) indicating product satisfaction • Established winter sun destination with proven track record • Safe, low incidence of crime and politically stable environment • High average length of stay • Rising interest in African destinations post-COVID • Wide distribution of the Gambian diaspora offering consistent VFR travel demand • Platforms like Instagram and TikTok show good engagement rates, providing a solid base for amplifying digital campaigns • Awareness and liking for current slogan and to a lesser extent the GT Board logo 	<ul style="list-style-type: none"> • International arrivals are struggling to fully recover after the COVID-19 pandemic • Poorly known among international travellers and the travel trade • Heavy reliance on aging charter-based, winter sun market and traveller demographics • A brand and international image that is strongly rooted in undifferentiated sun, sea and sand tourism and friendly people • Short tourism season (primarily November-April) • Lack of a diversified marketing strategy to expand into new segments • Inadequate e-marketing capacity, budget and digital presence • Limited MICE marketing and management skills • Limited depth and reliability of visitor statistics and research information • Poor website performance with slow loading times and poor mobile usability hindering user experience and search engine rankings • Uncompetitive <i>roots</i> offer for Afro-American market • Small domestic tourism market
Price	
<ul style="list-style-type: none"> • Affordability remains an important selling point for The Gambia • Affordability of daily subsistence i.e.: food, drink and entertainment 	<ul style="list-style-type: none"> • The destination is becoming increasingly expensive compared to other charter beach destinations • High airport taxes and entry/exit fees

Opportunities	Threats
Product	
<ul style="list-style-type: none"> • Opening up the River Gambia to tourism e.g. through a variety of river cruise options, from luxury to more affordable • Diversifying attractions and experiences to capitalise on the growing demand for sustainable and experiential travel • Filling the gap in tourist-quality inland and upriver eco-lodging and camping 	<ul style="list-style-type: none"> • Climate change impacting on coastal areas with sea level rise and beach erosion • Growing environmental degradation including deforestation, overfishing and pollution • Valuable heritage sites such as Kunta Kinteh island facing threats of water level rise

Opportunities	Threats
<ul style="list-style-type: none"> • Improved packing and integration of cultural and nature experiences • An aggressive promotion drive and incentives to attract more international hotel brands • Restocking of wildlife and tourism development of The Gambia's national parks • Development of MICE tourism to stimulate demand year-round • Further building and expanding The Gambia's image as a prime birding destination • Filling gaps in products and experiences for underdeveloped leisure tourism segments like adventure, wellness, sportfishing, photographic safaris and other special interest experiences • Possibilities for expansion of wellness tourism, e.g., eco-retreats, spas 	<ul style="list-style-type: none"> • Increased competition for investment from neighbouring countries • Limited access to affordable finance for tourism entrepreneurs
Place (distribution mechanisms & channels)	
<ul style="list-style-type: none"> • Strengthening relations with specialised ecotourism, adventure tourism and other niche market operators in key markets • Greater adoption of e-marketing and online booking and transaction systems to stimulate independent travel and tailor-made holidays • Adopting collective and aggressive air access policies to lure scheduled airlines to fly directly to The Gambia 	<ul style="list-style-type: none"> • Continued lack of investment in road and water transport infrastructure • Resistance to change and continued heavy bias towards charter-based sun, sea and sand tourism operators and failure to attract and support a wider spectrum of non-charter tour operators to sell The Gambia
Promotion	
<ul style="list-style-type: none"> • Capitalising on the growing regional tourism market from Nigeria and Ghana, especially for MICE and business tourism • Expanding MICE tourism segment • Rising interest in authentic cultural experiences • Growing demand for river tourism experiences • Much more emphasis on and refinement of digital marketing strategy • Growing bird watching market • Advancing cross-border tourism with Senegal • Partnerships with culturally inclined travel influencers can broaden appeal and highlight The Gambia's unique offerings. • A brand proposition based on the river would be persuasively and authentically differentiated 	<ul style="list-style-type: none"> • Strong competition from Senegal and Cabo Verde • Aging core customer base • Regional political instability affecting safety perceptions of The Gambia • Inability to capitalise on growing consumer preferences for experiential tourism • Over-reliance on few source markets • Future health pandemics and failure to address health concerns (e.g. malaria perception) • Neighbouring destinations like Sierra Leone, Senegal and Cabo Verde run stronger digital campaigns that attract similar audiences • Negative perceptions around sex tourism

Opportunities	Threats
	<ul style="list-style-type: none"> • A reluctance to change from current sun, sea and sand positioning to a more differentiated proposition
Price	
<ul style="list-style-type: none"> • Competing on the basis of differentiated offer rather than only on price • Making a concerted effort to reduce consumer taxes 	<ul style="list-style-type: none"> • Tight economic conditions in the UK and Europe resulting in consumers being increasingly price conscious in these markets • Competitor charter destinations offering more affordable and better value for money packages • Currency fluctuations badly affecting pricing • Rising flight costs affecting competitiveness • Failure to curb the cost of entry taxes and fees

1.8 Critical marketing and branding opportunities and challenges

In summary, the following aspects need to be addressed in the marketing, branding and investment promotion strategy to ensure sustainable and dynamic tourism growth in The Gambia.

2.1.1 Cross-cutting factors

- Diversifying markets and products:
 - The Gambia is in the consolidation and stagnation stages of the typical tourism destination lifecycle and risks market stagnation. This is exacerbated by the country's overdependence on a few major source markets, increasing inflation and cost of capital, high seasonality of arrivals and the resultant inability of product owners to recapitalise and improve their offering in line with contemporary market requirements. Without adopting a rejuvenation strategy, the country risks declining tourism arrivals and revenues, as well as being outcompeted on price and innovation.
 - A concerted, evolutionary strategy is required to shift the current product offer, market demand and image from being dominated by the sun-sea-sand offer, to a more balanced mix of both relaxation and experiential products and market segments.
 - Independent and tailor-made nature and culture exploration, niche markets (such as sport fishing, birding, water-based tourism, adventure sport, hiking, surfing, botanical tourism), remote working, MICE and religious pilgrimage are some of the segments that will be explored.
 - This required investment in suitable visitor infrastructure, hospitality facilities, activities and product quality inland from the coast and especially upriver from Banjul.

- Such diversification also requires development of human resources in areas such as tour operating, tour guiding, cultural interpretation as well as regulatory interventions to ensure a high quality and safe visitor experience.
- Launching a coordinated air access strategy:
 - The limited and expensive scheduled flights to The Gambia are major obstacles for expanding the market beyond packaged travel and addressing the high tourism seasonality.
 - The Government should address air access at the highest level and re-invigorate the national air access committee that was launched in 2019.
- Improving measurement, monitoring and management of tourism performance:
 - Setting measurable, regularly reported performance indicators that are not only based on outputs but also measurable outcomes for marketing activities conducted, will be important for informing and adapting strategies and plans to ensure the best possible returns on marketing investments. For example the large investment in attendance of trade shows should be evaluated against potential impacts of other forms of trade engagement.
- Strengthening marketing and product development capacity, funding and coordination:
 - Once the marketing strategy has been finalised, the marketing and product development divisions of the GT Board should be assessed and strengthened to deal with new marketing requirements such as a concerted move towards experiential and adventure tourism, a greater focus on e-marketing, entry into the MICE market and other strategies that are not properly supported by the current structure.
 - The situation analysis points out the risk of GT Board being entirely dependent on the visitor levy and thus targeting volumes of arrivals in the short term, without looking ahead and exploring new market opportunities that may take time to materialise. Suitable interventions are required to ensure a balanced approach e.g., by reintroducing a subvention from Treasury or setting aside a portion of levy revenue each year, for investment in new and upcoming markets.
 - Looking forward, the strategy must strengthen public-private sector coordination and collaboration by establishing formal mechanisms for private-public sector alignment, particularly in areas such as product diversification and The Gambia's destination marketing efforts.

2.1.2 Tourism product development and investment

- Promoting investment and products and experiences that appeal to new growth segments
 - A focused investment drive is required to ensure the development of infrastructure, facilities and services that are suitable for attracting experiential travellers who prefer nature-based, outdoor, cultural and community-based interactions. Such investments are especially required along the River Gambia.

- Improvement and refurbishment of existing beach holiday facilities is also required to attract higher-value packaged travellers and Meetings, Incentives, Conferences and Exhibitions (MICE) delegates.
- Packaging tourism experiences as themes and routes:
 - The country is relatively small, allowing visitors to experience many aspects of the destination in a limited timeframe. Presenting, packing and promoting the various experiences in thematic and route itineraries will improve the marketability of the destination.
- Focusing on sustainable and regenerative tourism development and marketing:
 - Travellers increasingly demand sustainable tourism experiences when selecting destinations. The Gambia's tourism offer is highly dependent on high-quality natural and cultural resources and it will be important for the destination to constantly improve and communicate its focus on sustainability and regenerative tourism.
- Promoting a value-for-money and high-quality proposition:
 - To ensure good value for money, unnecessary traveller charges and taxes all add to the cost of a journey, especially when couples or families travel, and should be avoided.
 - In addition hospitality staff, guides and transport providers should be trained up to ensure high quality of service provision, especially for inland experiences along the river.

2.1.3 Destination branding and image management

- Raising trade and consumer awareness of destination Gambia and its unique tourism proposition:
 - It will be important for the GT Board to shift its focus towards brand awareness creation and addressing negative perceptions among potential travellers who may have little, or uninformed knowledge about the destination.
- Managing perceptions, image and potential crises
 - Destination awareness raising should also focus of dispelling possible concerns or uninformed negative images of The Gambia, regarding visitor safety, health, hygiene and other risk factors.
 - It will be important to ensure the safety and well-being of visitors through ensuring adequate emergency services, visitor security and other risk-management measures.
 - A crisis communication plan should be developed to be prepared for any health, safety or security event that may impact negatively on the destination image.
- Differentiating the brand positioning and simplifying brand architecture and expression:
 - Current brand assets, especially the slogan (*The Smiling Coast of Africa*) and the GT Board brand identity entrench the concepts sun, sea and sand and friendliness. Underutilised resources, especially along the River Gambia, could be highlighted to

strengthen the current positioning differentiate the destination more clearly from competitors.

- The current brand architecture is unnecessarily complex and should be simplified so that one brand identity (logo) unites all tourism initiatives.
- Public and private sector stakeholders need to embrace a brand refreshment and change to signal a more diversified competitive intent.

2.1.4 Destination marketing

- Re-evaluating travel trade marketing interventions:
 - Trade shows should evolve to become strategic platforms for relationship building and product diversification. This should include employment of comprehensive trade show and niche event selection criteria based on ROI analysis and alignment with priority market segments.
 - FAM trips, roadshows and operator visits require strategic reimagining to serve as catalysts for product diversification and market expansion. Participant selection should be based on their ability to develop new products and reach higher-value and more diverse market segments. Creating collaborative marketing initiatives, including joint promotions, content creation and social media campaigns can help build demand for new products and experiences. Such initiatives should be backed by a systematic approach to tracking fam-trip, roadshow and operator visit outcomes.
 - Research findings indicate concerns about service standards, with operators consistently citing variable quality as a barrier to market growth. A comprehensive trade accreditation programme should be developed to address these quality assurance challenges.
- Capitalising on the growing promotional power of digital media:
 - Tourism destination and product marketing has been rapidly shifting away from traditional consumer media and business sales platforms towards the virtual and digital marketing space. Recent studies have shown that there are major gaps in industry digital marketing capacity in The Gambia.
 - This presents a major opportunity of re-gearing marketing strategies and mixes towards these new media in a targeted and measurable manner. The following are key aspects to address:
 - Improved website design and performance
 - Innovative content strategy
 - Investment in digital presence and advertising

3 Future growth direction

Based on the findings of the Situation Analysis, the following section sets the direction for marketing, destination branding and investment promotion in The Gambia. It addresses the international tourism vision, growth objectives and the main marketing foundations that underpin the strategy. These are:

- An ambitious vision, marketing principles and growth objectives.
- A differentiated market positioning and destination brand.
- Targeted target source markets and segments.
- Attractive experiences that match market needs.

3.1 Vision

Our marketing vision for 2030 is as follows, in support of the Vision of the National Tourism Policy and Strategy¹⁰:

The Gambia to be widely celebrated for our balanced and accessible mix of quality, value-for-money coastal relaxation and immersive nature and cultural experiences along the River Gambia. Our commitment to sustainable tourism development will protect our environmental and cultural heritage and showcase our welcoming way of life, with tourism being a key driver of inclusive economic growth.

3.2 Marketing principles

As indicated in Section 2, The Gambia is at a critical juncture in its tourism destination life cycle. To achieve the vision outlined above and progress on a rejuvenated growth path, the marketing strategy adopts the following principles:

- **Focusing on diversifying products and demand:** Concerted product and promotional interventions will be launched to attract a wider range of market and product segments and engaging them in interactive nature and cultural experiences.
- **Evolving the destination brand and image:** The destination brand and marketing messages will be adapted to represent a balanced mix of relaxation and experiential tourism.
- **Promoting market-led investment along the river:** To ensure the spread of tourism and to capitalise on global market movement towards experiential tourism, investment in water-, culture- and nature-based infrastructure and facilities on the river will be supported, facilitated and prioritized.
- **Alleviating tourism seasonality:** As indicated in Section 2.2 tourism is highly seasonal, with more than 60% of all visitor arriving during five months of the year. The strategy will

¹⁰ Vision statement of the National Tourism Policy and Strategy: By 2031, The Gambia with its friendly and hospitable people, unique flora and fauna and the majestic River Gambia, is a prime destination of choice for a sustainable and responsible tourism that encompasses valued experiences of natural and cultural heritage, wellness, quality products and services.

focus stimulating demand and improving air access during the traditional slower season months, especially during the “shoulder season” months of April/May and September/October.

- **Capitalising on public-private marketing and investment partnerships:** The GT Board, GIEPA and other government agencies will focus on providing a conducive and supportive environment for private sector marketing and investment in tourism.
- **Advancing value-for-money:** Destination marketing and development will emphasise value-for-money offered, more than price and affordability.
- **Advocating for sustainable and regenerative tourism:** The Gambia’s environmental, historical and cultural resources are fragile and sustainable and regenerative management will receive priority in marketing, visitor engagement and product development initiatives.
- **Pursuing a performance-based marketing approach:** Marketing outcomes and impacts will be measured and monitored, and activities will be planned accordingly. In addition, capacity and capabilities of the GT Board will be optimised to ensure effective leadership and implementation of the strategy.
- **Strengthening human resources in experience delivery:** The delivery of interactive experiences requires skilled interaction with visitors in respect of multi-faceted ground handling, tour guiding, community interaction, visitor safety and other visitor services. This requires upskilling and training of those who deliver these services.

3.3 Growth objectives

As indicated in Section 1.4.2 (Table 1), the draft National Tourism Policy and Strategy of The Gambia (2023-2032) sets the following growth targets for the 10-year period 2022 to 2031.

Table 3 Tourism growth targets set in the National Tourism Policy and Strategy

Macro Level Performance Indicator	Compound Annual Growth Rate (CAGR) %	Target 2031
International Tourism Arrivals	10.1	549,123
Domestic Tourists	No baseline	200,000
Hotel Bed stock	11.6	27,000
Employment	9.1	100,000 (Direct)
Foreign Exchange Earnings (US\$ mn)	7.2	US\$ 170 million
Contribution to GDP (%)	5.8	Direct: 15 %
Average expenditure per visitor per visit	2.2	US\$2100 (25% increase)

This indicates that the expected growth in key performance indicators, is in the order of nine to ten percent per annum (compounded).

In response to the challenges outlined in Section 2, the marketing strategy sets out to achieve the following growth objectives during the next five years:

- Growth in **leisure (holiday) and MICE** tourist arrivals and expenditure.
 - The marketing strategy will focus specifically on attracting discretionary (holiday and conferencing) tourists, i.e. those who would not come to The Gambia by default for business, visiting friends and relatives of other compulsory reasons.
- Increased share of **tourists visiting primarily for nature and culture** experiences.
 - As indicated above a key principle of the strategy is to diversify demand and to move from primarily attracting beach-package visitor to a more balanced visitor mix, including especially those visit The Gambia for nature and culture experiences.
- Growth in the share of **arrivals outside of the main charter-holiday season**.
 - Since seasonality of arrivals is a key challenge facing business sustainability, job security and investment returns, special actions will be implemented to promote tourism during the shoulder season periods of the year.
- Growth in **accommodation expansion** along the coast and river.
 - Expanding demand from sun, sea and sand tourism along the coast to attracting a more balanced mix of market segments requires investment in a greater variety and quality of accommodation inland from the coast, along the River Gambia.
- Growth in **scheduled airline seats** available.
 - Given that seasonality and the over-concentration of beach-tourism are highly related to The Gambia’s reliance on chartered air access, the strategy will promote the expansion of scheduled airline capacity, throughout the year.

Based on the above indicators, the following growth objectives are set for the next five years, 2026 to 2030

Table 4 Growth objectives for tourist arrivals (person times) and expenditure, 2019-2035

Growth Indicator	2024	2030 (Projected)	CAGR (%)
Holiday and MICE tourism arrivals*			
From the traditional markets in Western and Northern Europe ¹¹	71,718	141,559	12.0
From the non-Traditional markets in Southern Europe, Eastern Europe, Africa (conference) and the USA ¹²	32,775	58,063	10.0
Share of tourists citing nature and culture experiences as primary reason for visiting The Gambia **	9% (Est.)	15%	21.5
Out-of-Season arrivals (April-October) **	43.0%	50%	
Accommodation inland from the coast (Rooms, Est.)	800	955	3%
Weekly scheduled airline seats available from Europe***	4,153	7,357	10

* GT Board, 2024 Statistics

** Based on GT Board, 2023 Statistics

*** Civil Aviation Authority

¹¹ British, Swedish, Danish, Finnish, Norwegian, German, Belgian, Dutch, Spanish

¹² French, American, Italian, Austrian, Czechs, Polish, Irish, Nigerian, Gambian, African, Russian, Others

3.4 Market positioning

In line with the marketing vision and principles, The Gambia will in future be positioned and promoted based on the full range and diversity of experiences offered and not only as a destination for sun, sea and sand tourism. The destination stands out from other destinations in Africa due the attractive blend of sunny beaches, natural beauty of the River Gambia, welcoming and rich cultural traditions, and rich history, which are all easily accessible within one or maximum two-days travel from the international airport.

More specifically, the country's unique assets include:

- **Attractive coastline and pristine beaches**
 - **Unspoiled beaches:** The Gambia boasts over 80 km of golden sandy beaches along the Atlantic Ocean, offering tranquil escapes and lively beach spots. Whether visitors seek more secluded beaches or bustling shorelines with water sports, The Gambia caters to all tastes.
 - **Mild climate year-round:** With temperatures ranging from 24°C to 32°C and more than 300 days of sunshine, The Gambia is a year-round destination for sun-seekers, although its dry season (November to May) is particularly popular among beach lovers.
 - **Vibrant beach culture:** The lively atmosphere of beach bars and restaurants serving fresh seafood and other delicacies together with beautiful sunsets provide for an enjoyable experience.
- **Rich biodiversity of the majestic River Gambia**
 - **Biodiversity:** The Gambia is a birdwatcher's paradise with over 560 bird species, including kingfishers, eagles, and herons. The diverse ecosystems, from lush mangroves to dense forests, host wildlife such as monkeys, crocodiles, and hippos.
 - **River safaris and eco-tours:** The rich biodiversity can be explored on guided boat safaris along the River Gambia. The river is home to rare bird species and vibrant flora. Eco-tourism initiatives promote sustainable exploration while supporting local communities.
 - **Wildlife experiences:** While The Gambia is not at this stage a destination to see the Big 5 there are some interesting wildlife experiences on offer, such as the community-operated crocodile ponds where visitors are allowed to touch crocodiles, some areas where tourist are able to see red colobus monkeys, the chimpanzee rehabilitation project on islands in the river and a snake park.
 - **Adventure and exploration:** Adventure-seekers can engage in kayaking adventures, fishing trips, and guided nature walks. The serene surroundings provide an excellent backdrop for photographers and nature enthusiasts alike.
- **Warm hospitality and rich cultural traditions**
 - **Friendly locals:** Known as "The Smiling Coast of Africa," The Gambia is celebrated for its warm and welcoming people. Visitors often leave with lifelong friendships and cherished memories of genuine hospitality.

- **Cultural festivals and music:** The Gambia’s cultural vibrancy is showcased in traditional music, dance, and colourful festivals. Events such as the annual Roots Festival celebrate the rich heritage and historical connections of the region.
- **Crafts and cuisine:** The bustling markets filled with handmade crafts, vibrant fabrics, and souvenirs provide for an exciting shopping experience. Authentic Gambian dishes like domoda (peanut stew) and benachin (jollof rice), blend African and international flavours.
- **Historical legacy and heritage**
 - **Roots of history:** The Gambia is steeped in historical significance, from its pivotal role in the transatlantic slave trade to its ancient cultural heritage, as demonstrated at the UNESCO World Heritage-listed Kunta Kinteh Island site.
 - **Educational and reflective journeys:** Guided tours provide insightful narratives about the slave trade, colonial history, and the region's cultural evolution, making The Gambia a powerful destination for educational tourism.
 - **Cultural landmarks:** Tourists can visit interesting historical landmarks such as Fort James, the Wassu Stone Circles, and colonial-era architecture. Museums and heritage villages offer deep dives into The Gambia's rich cultural and historical tapestry.

The Gambia is indeed a “small” country, “big” in experiences as demonstrated in Figure 12 below, which intends to capture The Gambia’s most important Unique Selling Points (USPs).



Figure 12 Basis of differentiation, The Gambia

3.5 Destination brand

The marketing vision, principles and experiential positioning call for an evolution of the current destination brand, which is has been focused on promoting a sun, sea and sand proposition. The following section summarises the full rebranding brand strategy, which is available upon request from GT Board in both Word and PowerPoint formats.

3.5.1 Brand purpose

By providing brand focus motivate the need to change from a limited offering of budget sea, sun and sand product to a more diversified and valued offering that appeals to a wider range of tourists.

If the brand is to work hard at improving the contribution that tourism makes to the economic wellbeing of Gambians, it is going to have to be passionately lived by internal stakeholders under the determined leadership of the GT Board.

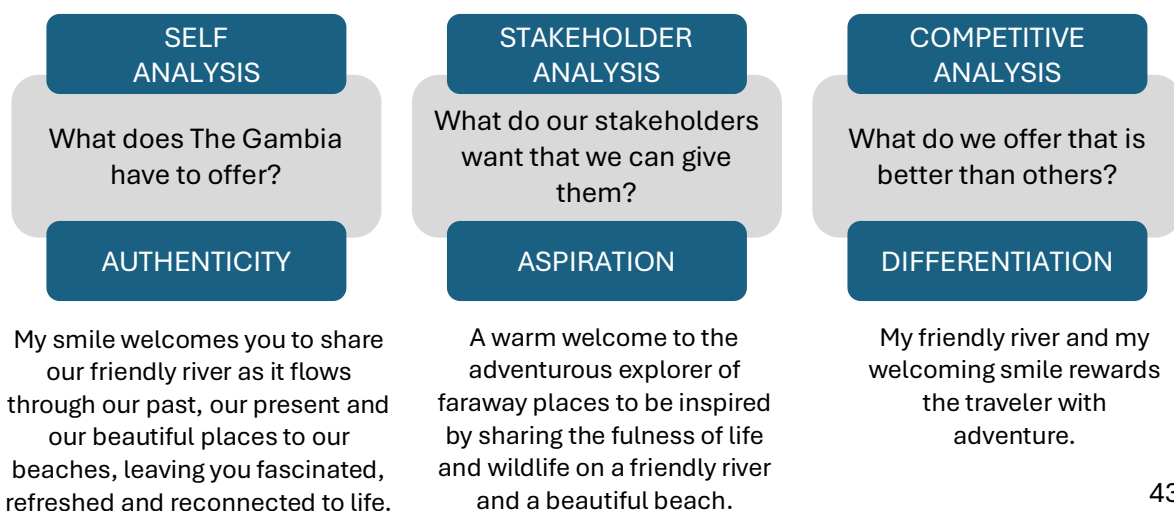
3.5.2 Brand assets

Although the brand strategy must serve the purpose of promoting a diversified tourism proposition, it must take cognisance of the irrefutable fact that The Gambia is already a tourism destination brand with valuable brand assets.



So, these assets must be considered and provide a starting point in defining the brand.

3.5.3 Brand positioning





MY SMILE WELCOMES YOU to explore life on Africa's friendliest river, as it flows through our past and our present, dancing and singing to the strumming of a kora and the drumming of a djembe, beating like the wings of colourful birds, as it makes its way through our beautiful places to rest on our relaxing beaches.



The positioning statement is distilled down to its core, which is our **brand promise** (or value proposition):

MY SMILE WELCOMES YOU to explore life on our friendly river and to relax on our beautiful beaches.

With a positioning statement and a brand promise in place a brand essence can be distilled, and a good brand essence should be our slogan.

The current slogan is much loved, but it has to change to signal The Gambia's intention to purposefully diversify by adding to its legacy of sun, sea and sand, but that does not mean its essence shouldn't be incorporated; the **smiling coast** of Africa.

But to both signal The Gambia's intent to diversify and to ensure that the slogan captures the essence of the brand promise there is a need to add the differentiating power of the wonderful river, so: *my smile welcomes you to explore life on Africa's friendliest river.*

smiling coast friendly river

In summary then:



POSITIONING: My smile welcomes you to explore life on Africa's friendliest river, as it flows through our past and our present, dancing and singing to the strumming of a kora and the drumming of a djembe, beating like the wings of colourful birds, as it makes its way through our beautiful places to rest on our relaxing beaches.

PROMISE: My smile welcomes you to explore life on our friendly river and to relax on our beautiful beaches.

PURPOSE: Motivate the need to change from a limited offering of budget sea, sun and sand product to a more diversified and valued offering that appeals to a wider range of tourists.

VISION: By 2030, The Gambia will have built on its established credentials of beach resort holidays by being recognised by tourists and the tourism trade for offering a wide range of quality, sustainable and responsible cultural and natural experiences, with tourism appreciated by all Gambians as a source of economic benefit.

MISSION:

- To build on the established beach tourism legacy by increasing the product offering to include quality eco-tourism experiences.
- To project an image of The Gambia as a destination that attracts a wide range of tourists.
- To increase duration and timing of visits by purposefully identifying experiences that extend the tourism season.
- By building marketing, coordination and monitoring capability.
- By attracting investment into The Gambia by tourism developers.

VALUES:

FRIENDLINESS that goes beyond welcoming visitors to treating them as valued guests.

GENEROSITY that finds expression in enthusiastically sharing the Gambian way of life.

PRIDE in all that The Gambia has to

SLOGAN:

Smiling coast, friendly river.

GREATER GOOD:

By rewarding tourists with an enriching experience, Gambians themselves will be rewarded.

3.5.4 Brand architecture

A monolithic master brand identity system will be used with the following brand identity representing all The Gambia’s tourism endeavours:



The only modification is that representing The Gambia Tourism Board where the brand identity is modified by a descriptor and the slogan is not included:



The Gambia Tourism Board brand identity will only be used when the authority on the board is required.

3.5.5 Brand expression

The formal brand expression is included under 3.5.4 and this wording must be used, only adapted as required by context.

The following creative guidelines must be applied to ensure increased recognition that helps with awareness and over times consistency builds trust:

- **Personification** imagines the brand as a person and someone like Ida Cham Njai who passionately represents the brand could be considered a symbol of its personification:



- **Our words** need to be inspired by the positioning statement:
 - They need to be personal: ‘**my** smile; ‘**you**’, ‘**our** past and **our** present’, ‘**our** beautiful places’, ‘**our** relaxing beaches’.
 - In addition to being personal this conveys pride in what The Gambia has to offer.
- In terms of **tone and manner** our brand values are our guide: *friendly, generous and proud*.
- **Photographically** we will share our way of life and our beautiful places but always give prominence to our smile.
- **Graphically** we are inspired by our head-tie, proudly the colour of the national flag.

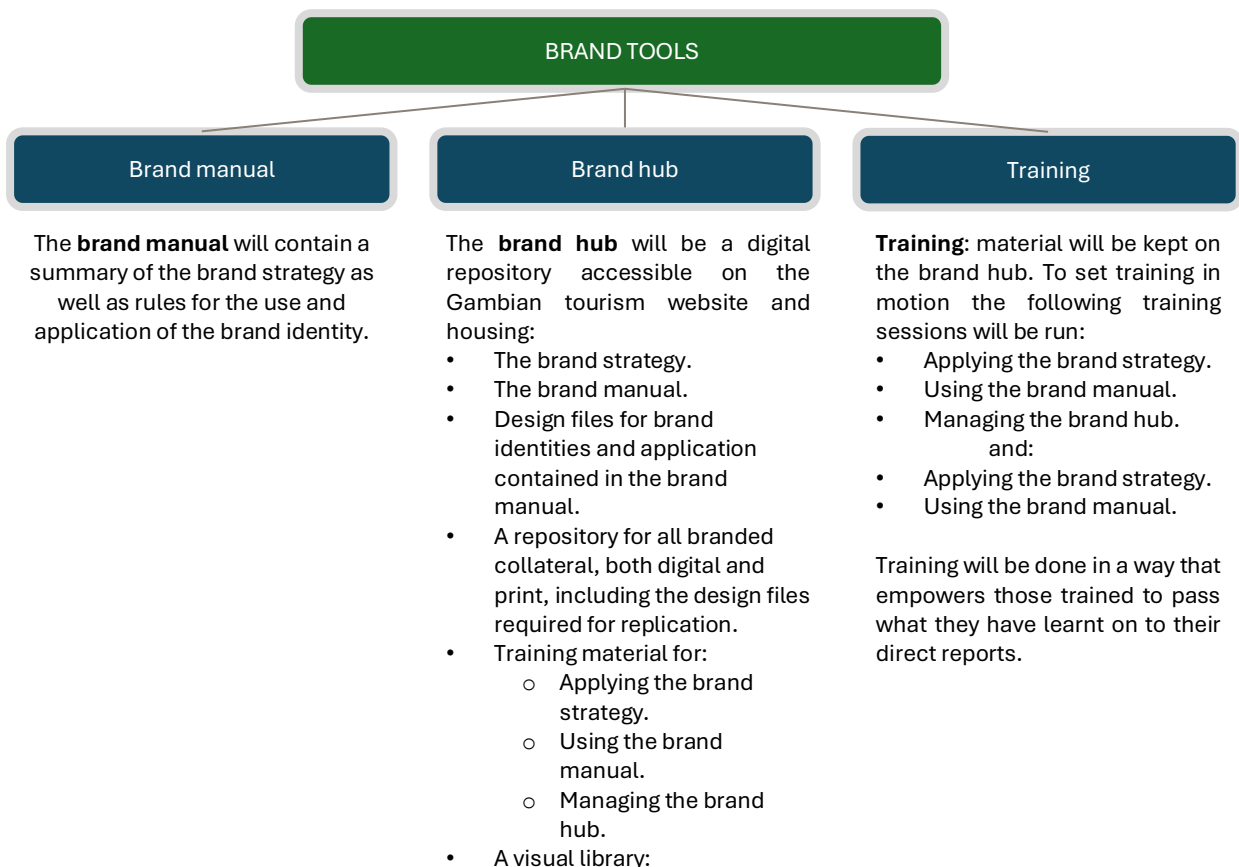
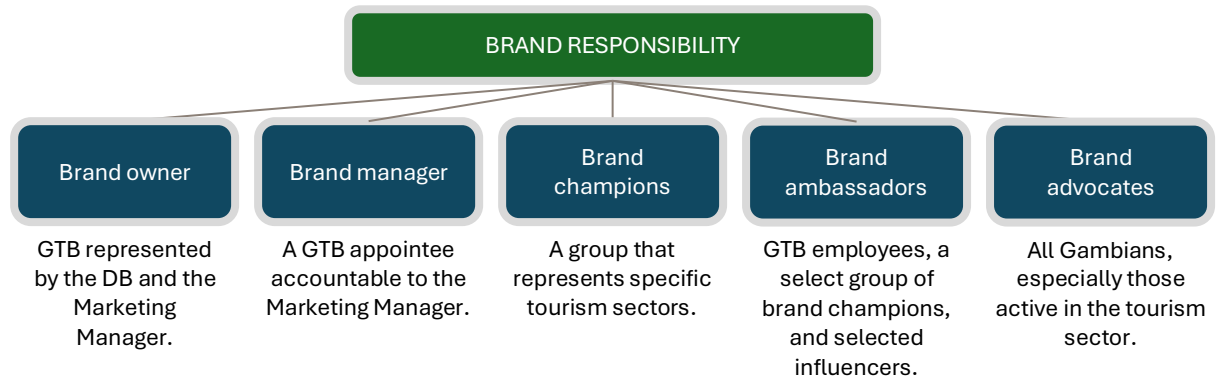


- Our **creative platform** is based on something that is extraordinarily special in The Gambia: the way Gambians not only welcome visitors as if they were guests, but invite them to share in their way of life:
 - It’s not only about ‘watch us dance’, it’s about ‘dance with us’.
 - It’s more than just ‘listen to our music’, it’s ‘learn to play my kora, come beat upon our djembe’.

- It's not only about 'taste our dishes', it's about 'help us prepare the meal we will share'.
- It's more than 'watch our rituals', it's 'understand our ways'.

WELCOME TO EXPLORING THE GAMBIAN WAY OF LIFE.

3.5.6 Brand management



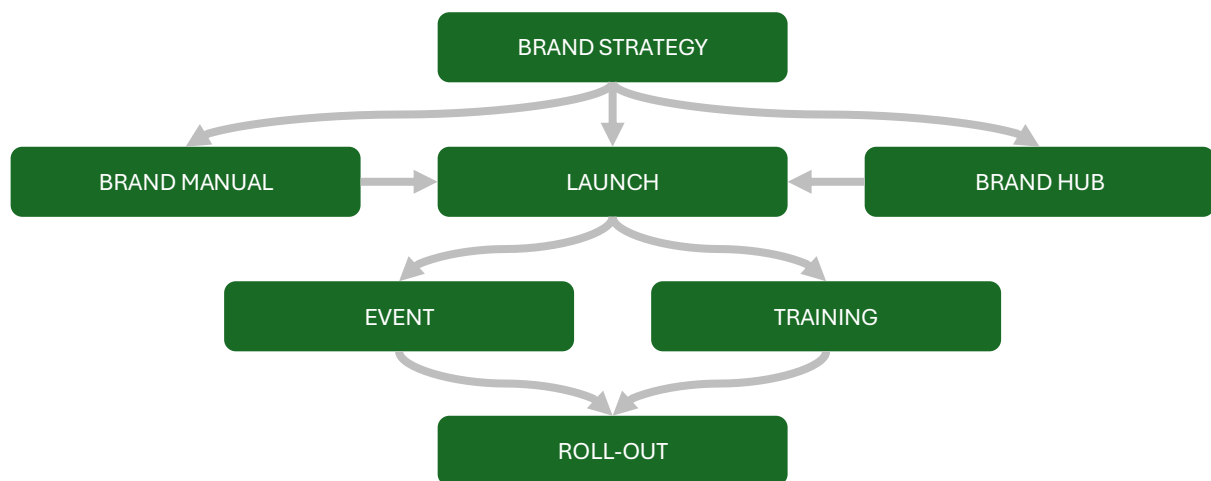
This project will ensure that the following are in place:

- This brand strategy.
 - Marketing strategy.
 - Investment strategy.
- And action plan.

As strategic planning and implementation become a habit each of the above will be reviewed and renewed on an annual basis.

3.5.7 Brand activation

Once the brand strategy is approved it needs to be activated and here is an overview of what that involves:



- The activation trigger is the approved **brand strategy**.
- The brand strategy is summarised in a **brand manual** which also gives direction on construction and application of the brand identity.
- A **brand hub**, housed on a password-protected section of the website, will be created and populated as a repository for brand tools that empower those responsible for building and protecting the brand.
- The **brand will be launched** once the above are in place:
 - A **gala event** led by the Ministry of Tourism, GTB and PIU.
 - A series of **training** modules.
 - An audit of **branded collateral** that is brand aligned and rolled out.

The full brand strategy is available from GT Board upon request and specific brand activation activities are included in Section 4: Marketing Strategies and Actions.

3.6 Target source markets and segments

To achieve the stated growth objectives and ensure the most efficient and effective application of resources, it is important to follow a targeted marketing approach by:

- Focusing the largest share of resources on markets and segments that have high value potential and are easier to convert to travel to The Gambia.
- Investing some resources in leveraging value from markets that do not hold high value growth potential but are easier to convert to travel to The Gambia.
- Investing substantial resources in growing market awareness and demand from markets that have high-value potential but are more difficult to convert to travel to The Gambia.

Based on the evaluation of markets and segments the following approaches will be followed.

NOTE: Appendix A provides in-depth profiling of the source markets and segments outlined in the sections below, including detailed marketing channels to reach travellers in these markets and segments.

3.6.1 Source markets

Potential source markets were analysed in terms of their tourism value potential on the one hand and the relative ease of attracting them and converting such potential to The Gambia on the other.

The following approach was followed:

- Allocating a score out of 5 to each of four factors used to measure Value Potential and to each of four factors used to measure Ease of Conversion.
- Allocating a weight to each of the 8 factors and scores were multiplied by the weights to obtain a final score
- The following measurable criteria were used to evaluate 14 potential source markets.

Value Potential

- Total outbound travel expenditure (UNWTO statistics)
- Average growth in tourism expenditure last 10 years (UNWTO statistics)
- Potential for year-round travel to The Gambia (GT Board data)
- Propensity for experiential and exploratory travel (Desk research using various reputable research resources)

Ease of Conversion

- Shortest fly time to The Gambia (Survey of online booking platforms)
- Current Gambia Leisure/MICE market share and affinity (GT Board statistics)
- Tour operator awareness and coverage (Consultant research)
- Travel expenditure/capita population - "travel thickness" (UNWTO statistics)

Based on the evaluation, the following market prioritisation and approaches will be followed as presented in Figure 13 and Table 5 below.

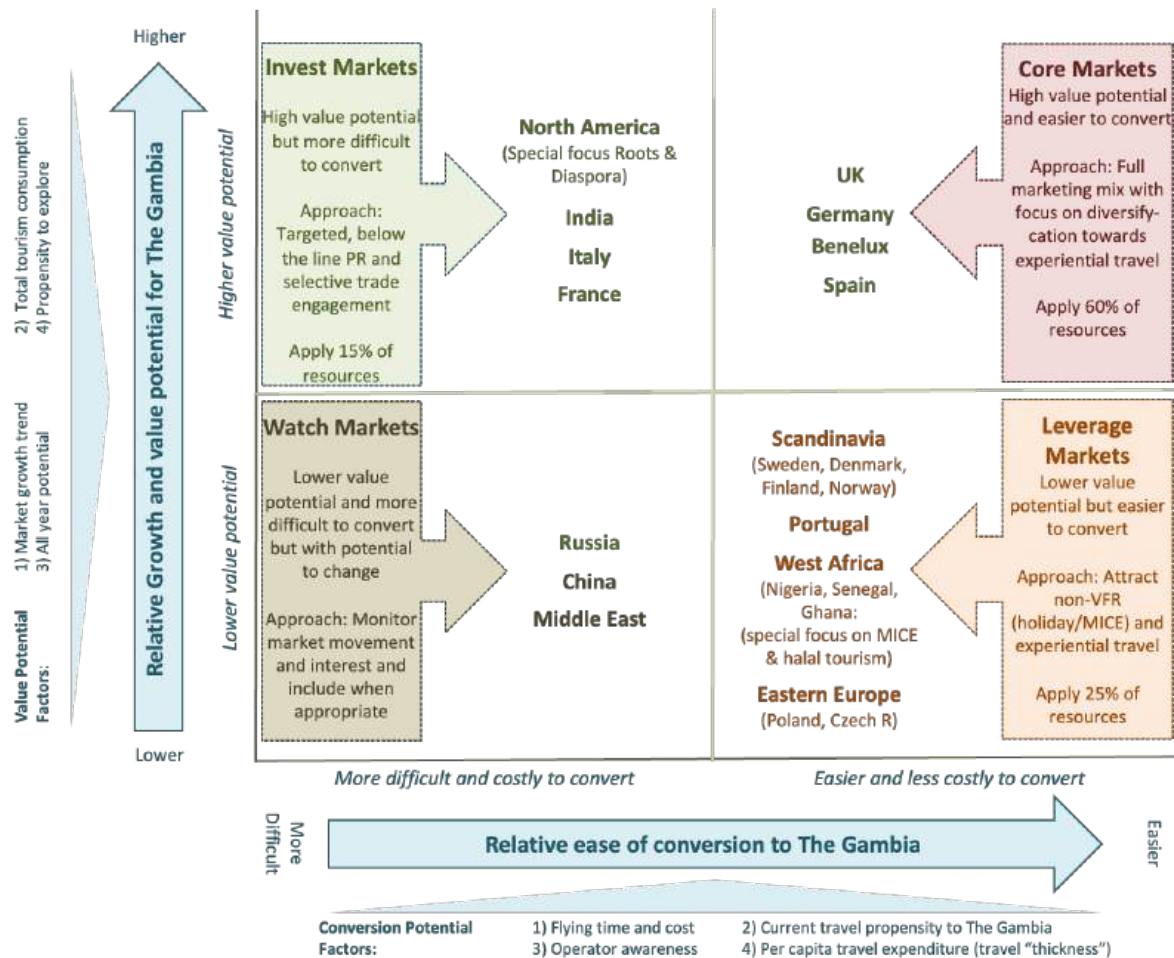


Figure 13: Target source markets and approaches

The market approaches are summarised as follows:

Table 5: Source market strategies and promotion approaches

Priorities	Countries/ regions	Strategy	Promotion approach
<p>Core Markets</p> <p>High growth and value potential; and</p> <p>Easier and less costly to penetrate.</p>	<ul style="list-style-type: none"> • UK • Germany • Benelux • Spain 	<p>Focus the bulk of promotional activities here with a special focus on higher spending Explorer and Special Interest Segments.</p> <p>Apply 60% of marketing resources.</p>	<p>These are priority markets for establishing The Gambia's in-market representation.</p> <p>Apply the full promotion mix in support of the marketing campaign, including:</p> <ul style="list-style-type: none"> • A major PR and media drive. • Strong digital promotion, both advertising and social media focus with matching language content. • Attendance of key trade fairs. • Workshops and sales visits. • Major trade education and joint marketing drive with inbound and foreign operators.

Priorities	Countries/ regions	Strategy	Promotion approach
			<ul style="list-style-type: none"> Selective traditional consumer advertising.
<p>Leverage markets</p> <p>Lower growth and value potential and easier and less costly to penetrate</p>	<ul style="list-style-type: none"> Scandinavia (mainly Sweden and Norway) Portugal West Africa (Nigeria, Ghana & Senegal - substantial focus on MICE) Eastern Europe (Poland & Czech Republic) 	<p>Focus limited promotional activities here and aim to extract maximum value from travellers.</p> <p>Apply 20% of marketing resources</p>	<p>Expand and deepen the tourism offer, including:</p> <ul style="list-style-type: none"> Providing West Africa-focused and special interest travel trade with product updates and information. Collaborating with airlines to promote special offers during shoulder-season periods of April/May and September/October. Leveraging suitable online channels and content to make it easy for travellers to access information online.
<p>Invest markets</p> <p>High growth and value potential, and more difficult and costly to penetrate</p>	<ul style="list-style-type: none"> USA and Canada (especially Roots and diaspora) India Italy France 	<p>Focus selective promotional activities here to raise awareness of The Gambia, especially among higher value and experiential travellers, with the aim of growing these into the Core Market portfolio in the longer term</p> <p>Apply 15% of marketing resources</p>	<p>Selective marketing activities in support of the marketing campaign, in association private sector through e.g.:</p> <ul style="list-style-type: none"> Selective travel trade and media education and familiarisation program. Selective travel trade joint promotions with inbound and foreign operators. Major online drive through multi-lingual language content expansion and suitable social media channels.
<p>Watch markets</p> <p>Lower growth and value potential, and more difficult to penetrate</p>	<ul style="list-style-type: none"> Russia China Middle East 	<p>Look for ad-hoc marketing opportunities</p> <p>Use spare resources only to support partners</p>	<p>Opportunistic marketing activities, depending on the nature and extent of opportunities that emerge.</p> <p>Monitor market and air travel developments and add to Invest Markets when appropriate.</p>

3.6.2 Market segments

Various current and potential market segments were identified through focus group discussions, tour operator interviews, desk research and stakeholder workshops. These were evaluated based on their indicative scope for growth (in terms of value, volume and ability to spread tourism around) and The Gambia's readiness for such growth in terms of access to experiences, tourism facilities for these segments and cost of promoting The Gambia to them.

The following marketing approaches are recommended for the various segments. Detailed profiling of each market segment, with recommended marketing channels and tactics to reach them is attached as **Appendix A**

Market segments and profiles	Marketing approach
<p>Packaged explorer:</p> <p>Cautious ‘soft’ exploration as part of a packaged group tour, visit mainly the key cultural and historical attractions.</p> <p>Budget conscious; exploration often as a multi-country overland tour or as extension to beach packages.</p> <p>25-55 years</p> <p>Interested in well-known wildlife, historical, scenic exploration e.g. boat trip on the river, visits to iconic attractions, cultural show, short nature walks and other such experiences.</p> <p>Includes historical Roots and Homecoming travel groups, especially from the USA.</p>	<p>Go full out to capture this segment</p> <ul style="list-style-type: none"> • Western, Northern, Southern & Eastern Europe • Scandinavia • USA <p>Strengthen links between beach and inland packages and tie into existing itineraries.</p> <p>Apply a full mix of promotional elements and focus on media awareness, travel trade education and promotion.</p> <p>Current packaged (charter) operators to The Gambia and local DMCs are key distribution channels.</p> <p>Provide and distribute information and contents related to key attractions.</p>
<p>Tailored explorer:</p> <p>Confident ‘soft’ exploration on a tailor-made itinerary, fulfilling the explorer spirit - it’s partly about sharing the story. Want to delve deeper and veer off the traditional circuit based on personal preference. Organised trips, with some local interaction.</p> <p>Medium to higher volume, mid to higher priced (US\$80 to US\$150 per room night).</p> <p>35-70 years, some families but mostly traveling without children.</p> <p>Primary interests: nature and wildlife highlights as “bucket list” experiences, often coupled with a beach break.</p> <p>Secondary interests: local culture, soft adventure (e.g. marine and hiking activities, boat cruises, etc.) & scenery.</p>	<p>Go full out to capture this segment and improve service delivery</p> <ul style="list-style-type: none"> • Western, Northern Southern Europe • Scandinavia <p>Value for money expected at hotels, catering, guiding, etc. important.</p> <p>Research on internet, booking packages through tour operators and travel agents.</p> <p>Expect tailor-made packages to be managed by local DMCs and guides. Promote multi-destination itineraries.</p> <p>Focus on specialist travel trade, high-quality media exposure and promotion and increased online media exposure.</p>
<p>Intrepid explorer:</p> <p>Confident ‘hard’ exploration on a flexible, largely independent itinerary and in search of</p>	<p>Grow this segment from a low base</p> <ul style="list-style-type: none"> • Western, Northern Europe • Scandinavia



Picture: Gambia Experience



Picture: <https://www.instagram.com/visitthegambia/>



<https://readingthebooktravel.com/>
Picture: [tps://www.responsiblevacation.com](https://www.responsiblevacation.com)

Market segments and profiles	Marketing approach
<p>extraordinary experiences - prepared to sacrifice comforts and go the extra mile, to visit less visited places experiences.</p> <p>Substantial travel volumes, budget to mid-priced.</p> <p>25-55 years.</p> <p>Adventure, adrenaline, wildlife, cultural and environmental interaction, community-based experiences (food, attending local ceremonies).</p> <p>Includes SAVE (Scientific, Academic, Volunteer and Education tourism)</p> <p>Travel to learn, explore, help and grow cultural and natural heritage preservation efforts and contribute to the improvement of local communities.</p> <p>Mainly younger travellers on gap year trips or empty nesters (45-60 years) associated with particular occupations or social development organisations.</p>	<ul style="list-style-type: none"> • USA (mainly SAVE market) <p>Leaning heavily towards online channels - online reservations, information from websites, social media and forum groups.</p> <p>Focus on online, digital communication and leveraging social media, communicate exceptional 'stories', sites and experiences.</p> <p>Engage Voluntourism operators.</p>
<p>Domestic and regional breaks: Citizens from The Gambia and neighbouring countries, taking short breaks to spend quality time relaxing and visiting key sites.</p>	<p>Leverage this segment for longer stays and more spend.</p> <ul style="list-style-type: none"> • The Gambia • West Africa (Nigeria, Ghana, Senegal) <p>Develop special price packages, packaged and sold by private travel agents, tour operators and suppliers. Use full promotional mix including TV, print and online media.</p>
<p>Ecotourists:</p> <p>A collective segment of travellers who are intent on responsible travel to natural areas with a focus on conserving the environment, sustaining the well-being of the local people, and involving interpretation and education. For The Gambia these could include birders (major potential), anglers/fly-fishers, photographers,</p>	<p>Grow this segment from a low base</p> <ul style="list-style-type: none"> • Mainly Western, Northern Europe & Scandinavia but all source markets depending on interest <p>Distribution channels include word of mouth, friendship/interest groups/clubs self-arranged through</p>



Pictures: <https://www.overlandwestafrica.com/>



Picture: Jimmy's Tours



Picture: <https://www.nairaland.com/>



Picture: <https://thenationonlineeng.net/>

Market segments and profiles	Marketing approach
<p>cultural and community-based touring.</p> <p>The appeal is about discovering new environmental and cultural phenomena and species.</p> <p>Low volume, mid-priced.</p> <p>For many general sightseeing, wildlife, culture and marine experiences will be important components of a trip – probably as an extension.</p>	<p>local contacts or through a specialist tour operator.</p> <p>Focus on education and promotion to specialist ecotourism operators and online media exposure in outdoor publications and online niche market platforms.</p> <p>Stage journalist programmes for special interest media.</p> <p>Leverage special interest.</p> <p>Major focus on online, digital communication and leveraging social media, communicate exceptional sightings, events and experiences.</p>
<p>Outdoor active and adventure enthusiasts:</p> <p>A collective segment of specialised niche adventurous outdoor sport enthusiasts, e.g. hiking/trekking, quad biking, cross-country and endurance running, motorcycling, off-road/4x4 rallies, climbing, paragliding, canoeing/ kayaking, wind/kite surfing. Always in search of new places to practice their interests.</p>	<p>Grow this segment from a low base</p> <ul style="list-style-type: none"> • Mainly Western, Northern Europe & Scandinavia but all source markets depending on interest <p>Distribution channels include word of mouth, friendship/ interest groups/ clubs self-arranged through local contacts or through a specialist tour operator.</p> <p>Stage journalist programmes for special interest media.</p> <p>Focus on education and promotion to specialist adventure operators and online media exposure in outdoor publications and online adventure sport platforms.</p> <p>Major focus on online, digital communication and leveraging social media; engage with associations and clubs.</p>
<p>Other niche segments:</p> <p>Various small segments of specialists visiting The Gambia for its unique features, in particular aspects like antiquities, religious pilgrimage, archaeology, palaeontology, geology, anthropology, art, etc.</p>	<p>Grow these segments from a low base.</p> <ul style="list-style-type: none"> • Mainly Western, Northern Europe & Scandinavia but all source markets depending on interest <p>Provide information on the official website and empower and educate staff to be able to support special interest practitioners and visitors with advice and information. Do this</p>



Picture: <https://www.accessgambia.com/>



<https://www.base-mag.com/footsteps-on-the->



gambia

Picture: <https://www.accessgambia.com/>



Picture: <https://archaeology.cornell.edu/>

Market segments and profiles	Marketing approach
<p>MICE (including “Roots” & diaspora travel):</p> <p>Delegates travelling to The Gambia for organised events, to meet and discuss with colleagues on issues of mutual concern, in a professional and interesting environment with opportunities for local, high-quality experiences.</p> <p>Decision making of conference locations and delegate marketing by organisations and conference organisers rather than by individuals and tour operators.</p> <p>Delegates cover all ages and demographics, but mainly include working professionals.</p> <p>For purposes of segmentation, includes Gambian Roots and diaspora travellers who visit the country for purposes other than VFR, i.e. leisure MICE, or attendance of specific events.</p> <p>This also includes religious pilgrimages and halal-tourism.</p>	<p>in collaboration with academics and specialists.</p> <p>Grow this segment from a low base</p> <ul style="list-style-type: none"> Mainly West Africa, with potential for Europe once established <p>Focus on engaging conference buyers, associations and conference organisers to create awareness of The Gambia as MICE destination and to bid for and attract meetings and conferences.</p> <p>Exhibit at IBTM (Incentives, Business Travel & Meetings) show, Barcelona.</p> <p>Attain membership of ICCA (International Congress & Convention Association).</p> <p>Create and promote an online inventory of venues and services for bidding purposes.</p> <p>Engage local and regional professional associations, sport and cultural bodies.</p> <p>Engage tour operators in the USA & elsewhere that specialise in “back to the roots” and “homecoming” trips</p> <p>Engage religious organisations in West Africa, especially Nigeria, to arrange events and group visits to The Gambia.</p>
<p>Inclusive and packaged beach holidaymakers:</p> <p>Desire to completely relax with all services provide, including some fun water and social activities, and a choice of half-day or full day excursions around Banjul.</p> <p>Excellent food choices, clean beaches, pool and spa are expected.</p> <p>All age groups (currently weighted in favour of 55+ age group)</p>	<p>Leverage value from this segment</p> <ul style="list-style-type: none"> Western, Northern, Southern & Eastern Europe Scandinavia West Africa (limited) <p>Continue engagement and joint marketing with charter operators, but use marketing support to encourage operators to promote nature and culture extensions and excursions and to raise demand along the river.</p>



Picture: <https://www.dailysabah.com/>



Picture: <https://thetheatretimes.com/kankurang-festival-2019-the-gambia/>



<https://www.2bookaholiday.com/>

Market segments and profiles	Marketing approach
<p>Value for money as a key selection criteria.</p>	<p>Engage in direct operator visits in source markets rather than only at trade shows.</p> <p>Promote website and social media following among charter package visitors.</p>
<p>Cruise travellers:</p> <p>Guests on cruise ships that stop over in The Gambia enroute to Europe or Southern Africa.</p> <p>All ages. Don't use local accommodation services, but could patronise local restaurants and craft/curio markets.</p> <p>Morning and day excursions to key attractions, using local tour guides and transport providers.</p> <p>Decision makers regarding cruise harbours and anchor locations mainly with cruise ship companies.</p>	<p>Leverage value from this segment</p> <ul style="list-style-type: none"> All nationalities - passengers on cruise liners <p>Engage major cruise ship companies that play the Europe-Africa route and solicit their engagement with The Gambia.</p> <p>Improve cruise berthing and terminal facilities and immigration procedures.</p> <p>Provide high-quality information on excursions and encourage companies to include upriver excursions as options.</p>



Picture: <https://thepoint.gm/>

Given the substantial number of market segments that The Gambia is in a position to target, Figure 14 below proposes strategies, priorities and resource allocations for promoting the Gambia to the various market segments identified. The evaluation is based on 2 primary factors, each underpinned by several indicators as outlined in Table 6 below.

Table 6: Factors and indicators used to evaluate and propose market segment strategies

Factor	Indicators
<p>1. Growth and value adding potential of the segment for The Gambia</p>	a) Segment size and growth trend
	b) Consumption/expenditure per visitor
	c) Seasonal spread throughout the year
	d) Geographic spread of tourism in the Gambia
<p>2. Gambia's readiness and ease of attracting the segment</p>	a) Extent and quality of tourism resources to attract and service the segment
	b) Current Gambia brand awareness and market traction of the segment
	c) Extent and convenience of air, road and water access for attracting and servicing the segment

The evaluation reveals three segment clusters as indicated in Figure 14 below, with varying proposed strategies.

Table 7 below presents the market segment clusters and strategic approaches for these, based on a detailed evaluation, which is included as **Annexure A4**.

Table 7: Market segment clusters and marketing approaches

Cluster & Approach	Segments
<p>Higher Readiness AND Higher Value Potential</p> <p>Apply 40% of resources.</p> <p>Segments which The Gambia is ready to service and attract with relative ease, and which offer higher growth and value adding potential.</p> <p>Target and Capture</p> <p>Aggressively pursue these segments and improve products and services, to achieve greater diversification over the next 5 years. They are at the heart of the proposed rebranding and marketing campaign and key marketing elements will include:</p> <ul style="list-style-type: none"> - Promoting investment in improving and expanding products and services for these segments - A major drive to expand exposure and programmes of tour operators that sell to these traveller types. - A major consumer-focused digital marketing campaign. 	<p>Packaged Explorers</p> <p>Ecotourists (especially birder and photographers)</p> <p>Intrepid Explorers</p> <p>Source markets:</p> <ul style="list-style-type: none"> • Western, Northern, Southern Europe • Scandinavia • USA
<p>Higher Readiness BUT Lower Value Potential</p> <p>Apply 40% of resources.</p> <p>Segments which The Gambia is ready to attract with relative ease, but which offer lower growth and value adding potential.</p> <p>Maintain and Leverage Value</p> <p>Maintain these segments as the backbone of the tourism industry and leverage as much value from them.</p> <p>Ky marketing elements will include:</p> <ul style="list-style-type: none"> - Engagements and joint marketing with established tour operators. - Expansion of available offers and packages to derive increased spend. - Special offers during shoulder season periods to stretch the season. 	<p>Package beach holidaymakers</p> <p>Domestic and regional leisure breaks</p> <p>Cruise Travellers</p> <ul style="list-style-type: none"> • Western, Northern, Southern & Eastern Europe • Scandinavia • Domestic • West Africa
<p>Higher Value Potential BUT Lower Readiness</p> <p>Apply 20% of resources.</p> <p>Segments that offer growth potential, but which The Gambia is not yet well-equipped to receive and attract.</p> <p>Invest in and grow these segments over time, to achieve greater diversification over the next 5 years. Marketing elements will include:</p> <ul style="list-style-type: none"> - Promoting investment in new and innovative products and services for these segments - Expanded media exposure to create awareness of The Gambia's offer. - Establishing tour operator and conference intermediary relationships. - Targeted digital marketing. 	<p>Tailored (higher value) Explorers</p> <p>MICE Delegates</p> <p>Outdoor Active Travellers</p> <ul style="list-style-type: none"> • Western, Northern, Southern & Eastern Europe • Scandinavia • West Africa (MICE)

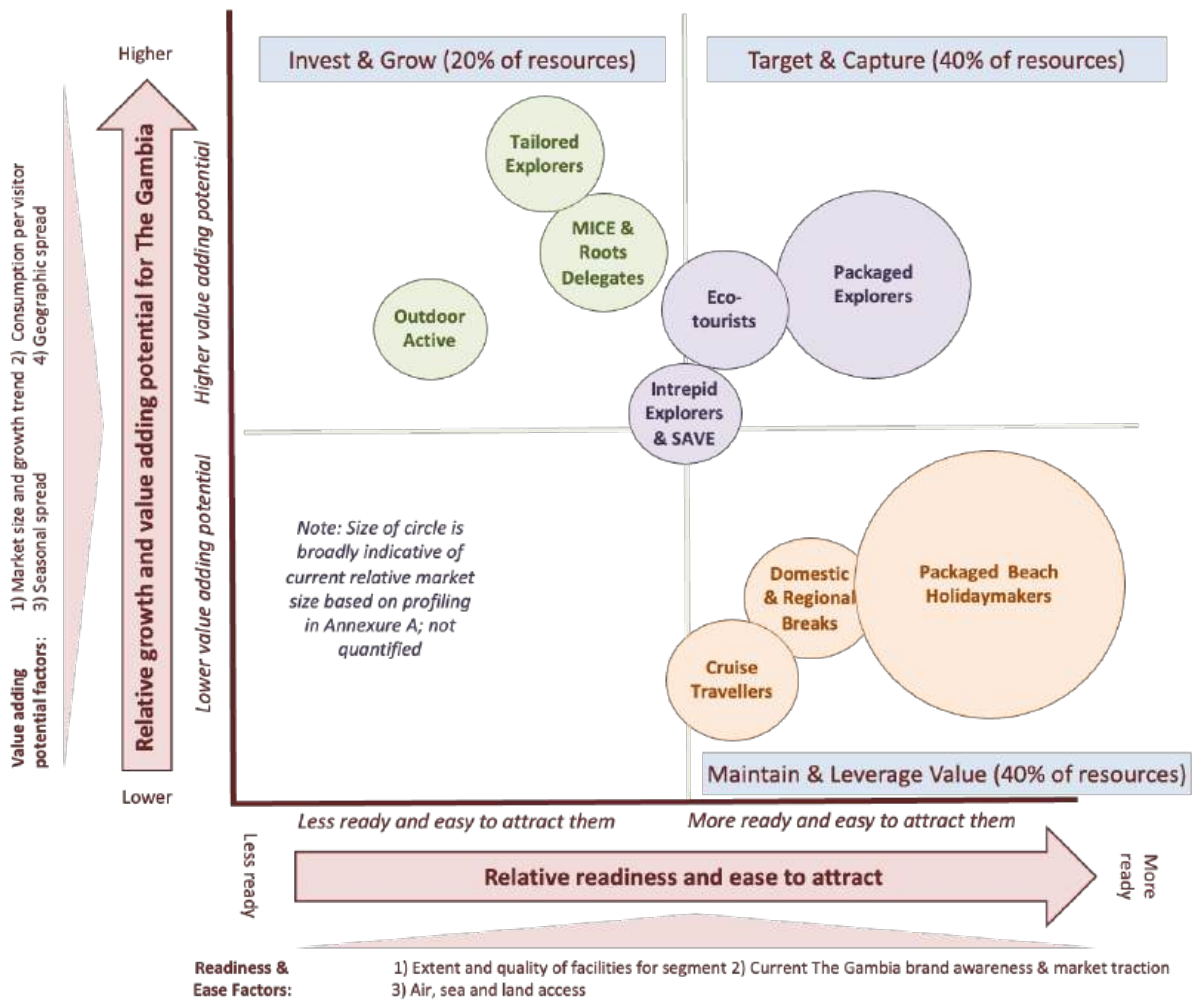


Figure 14: Target market segments and approaches

3.7 Matching products and experiences

The following patterns are evident regarding the appeal of experiences and attractions for the various target market segments.

- *Eco and environmental attractions*, especially the open beaches, river ecosystem, community-based experiences, hiking, and birdwatching appeal across a range of more active market segments and are especially attractive to Explorers, Ecotourists and Outdoor Active segments.
- *Historical sites and structures* appeal strongly to all Explorers, Cruise, MICE and Religious market segments, based on the fact that the archaeological, religious and historical sites offer opportunities for both ‘hard’ and ‘soft’ exploration.
- While general *cultural interaction* appeals across all segments, ‘deeper’ cultural experiences like tribal traditions, community-interactions, interactive food experiences, craft heritage etc., have high appeal for Intrepid and Tailored Explorers.

- *Lifestyle and entertainment* experiences are of specific importance to the Regional short-break market, MICE delegates, but appeal also to the Packaged and Tailored Explorer market.

As presented in Figure 15 below, the Destination Innovation Matrix (Gardiner and Scott, 2018) is applied to scope out product development opportunities for the various target market segments.

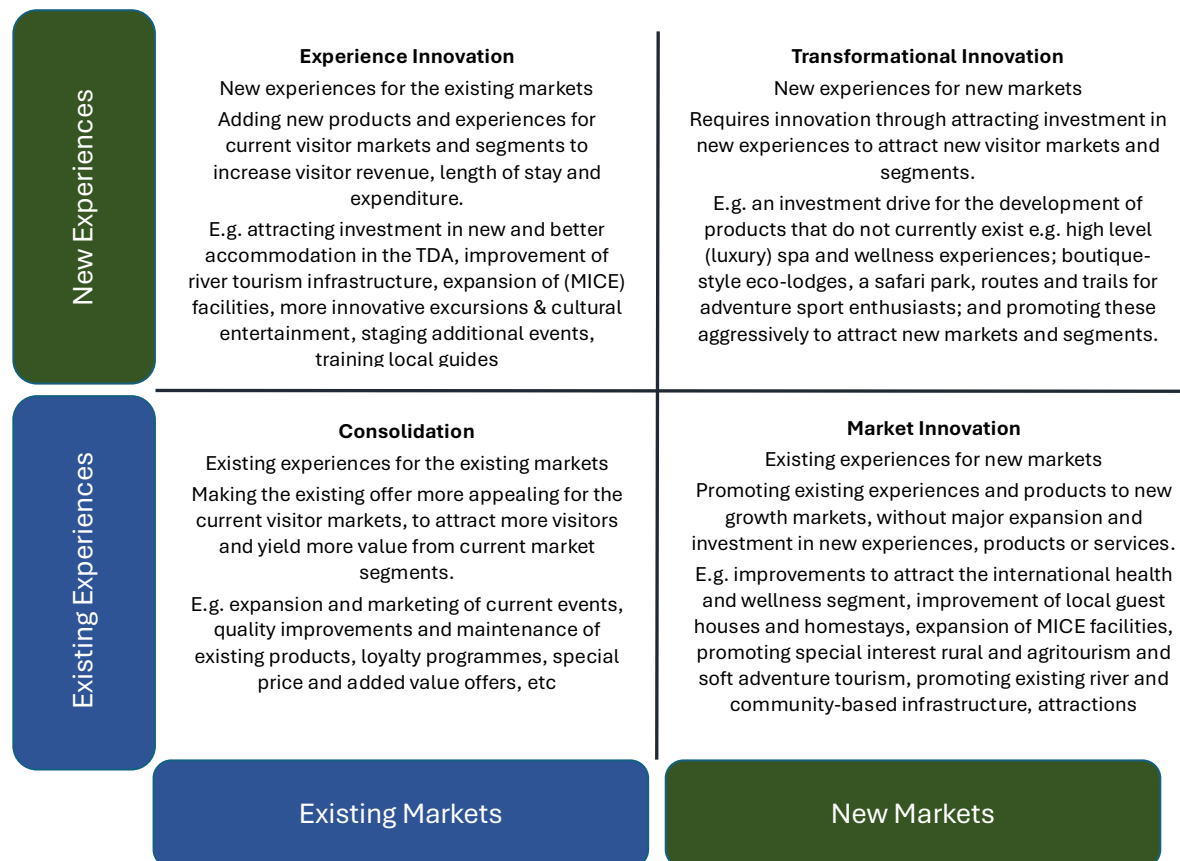


Figure 15 Destination Innovation Matrix (Gardiner and Scott, 2018)

From a target market perspective the following product approaches are recommended as outlined in Table 8 below.

Table 8 Product requirements and opportunities that match the needs of target market segments

Market segment	Requirements	Specific product opportunities
Packaged and Tailored Explorers	<p><i>Focus on visitor convenience, management and interpretation at key culture and nature sites</i></p> <ul style="list-style-type: none"> • Expanded and deepened range and quality of interactive experiences, along the coast and river. • Improved interpretation, guiding and personalised services such as private and specialist guiding. • Authentic experiences, avoiding overtourism. 	<ul style="list-style-type: none"> • <i>Cultural and historical tours</i> focusing on key cultural and historical attractions on the traditional north-western and south-eastern circuits including visits to iconic sites such as Kunta Kinteh Island and the Wassu Stone Circles. • <i>Wildlife and scenic exploration tours</i> including boat trips on the River Gambia for viewing birdlife, hippos and monkeys and short nature walks in places like Tanji Bird Reserve, and Niimi National Park.

Market segment	Requirements	Specific product opportunities
	<ul style="list-style-type: none"> • Good variety and quality of community-based tourism. • Good range, quality & investment in higher-quality hospitality facilities & services. • Visitor safety e.g. walkways, viewing platforms, safety railings, etc. • Basic, clean visitor facilities at key sites (toilets, curio and snack shops, shaded seating, etc.). • High quality travel facilitation, water and land transport. • Good visitor management e.g. information, ticketing, capacity management and impact monitoring. 	<ul style="list-style-type: none"> • <i>Cultural shows and interactive experiences</i> showcasing traditional music, dance and festivals, cooking classes, craft workshops and community visits. • <i>Combined beach and inland packaged itineraries</i> bringing together relaxation and exploration components. • <i>Comfortable and accessible accommodation</i>, including mid-range tourist and boutique style hotels and higher quality guest houses and lodges at key sites offering value for money, good food and friendly service. • <i>Guided tours and transport</i> providing knowledgeable guides who can offer insights into local history, culture and wildlife with comfortable and reliable transport. • <i>Development of spa and wellness facilities and skills</i>, including upskilling of training of spa therapists, training in preparation of healthy menus and dishes.
Intrepid Explorers & SAVE travellers	<p><i>Focus on packaging well curated adventure and challenging physical activities, authentic wildlife, education and cultural experiences</i></p> <ul style="list-style-type: none"> • High-quality, specialised and exclusive wildlife and cultural experiences (local cuisine or unique cultural ceremonies) and historical experiences. • Specialised events and circuits to build awareness and reputation. • Opportunities for community-based engagement and volunteering 	<ul style="list-style-type: none"> • <i>Wildlife and nature exploration tour experiences and volunteering</i> with emphasis on interaction including wildlife safaris and self-guided tours. • <i>Specialized ‘deep dive’ historical and cultural tour experiences</i> including archaeology and anthropology such as Roots, Wassu Stone Circles and Mali Empire, cultural events. • <i>Budget to mid-range accommodation</i> including expeditionary camping facilities with limited services in remote locations. • <i>Community-based tourism experiences and volunteering</i>, with a focus on promoting Gambia’s welcoming spirit and building tourism management capacity and hospitality skills at local level.
Ecotourists and Outdoor Adventure Enthusiasts	<p><i>Focus on packaging special interest experiences and improved community hospitality</i></p> <ul style="list-style-type: none"> • Hiking routes and homestays and guesthouses, guide services, local community hospitality • Bird hides and community bird guiding • Adventure sport events (long-distance running, rafting, cycling, rally’s, etc.) • Adventure activities including guide training, safety measures and guidelines, etc. 	<ul style="list-style-type: none"> • <i>Adventure and adrenaline activities</i> such as hiking, kayaking/canoeing expeditions, off-road biking, wind/kite surfing, paragliding. • <i>Specialised nature-based experiences</i> including wildlife viewing and photography (monkeys hippos birding dolphins), angling/fly-fishing. • <i>Organised adventure sport events</i> such as long-distance running, rafting, cycling. • <i>High quality support services</i> including specialised equipment and certified/accredited guiding services. <p><i>Budget to mid-priced accommodation</i> including eco-friendly lodges, guesthouses and camping facilities with basic comforts, close to nature.</p>

Market segment	Requirements	Specific product opportunities
MICE	<p><i>Focus on building capacity for hosting and expanding the MICE industry</i></p> <ul style="list-style-type: none"> • International convention centre with facilities to cater for both large conferences and smaller meetings. • Dedicated MICE institutional capacity in the tourism board. • High-quality MICE marketing collateral. • Professional services, advice and support to delegates. 	<ul style="list-style-type: none"> • <i>Specialized event planning</i> and management services including marketing, on-site management and exhibition logistics. • <i>Efficient and reliable transport services</i> including airport transfers, shuttle services, and local transport options to ensure smooth travel for delegates. • <i>Culture and recreation activities</i> for delegates during free time or as add-on experiences pre- or post-event. • <i>High-quality dining and catering services</i> including fine-dining restaurants offering local and international cuisine, and specialised catering services for large-scale events and smaller private meetings. • <i>Safety, security and emergency services</i> to ensure delegate health and safety including VIP protection. • <i>A variety of quality accommodation</i> from luxury to boutique/specialised with business-friendly amenities including meeting rooms, business centres and high-speed internet.
Inclusive and packaged beach holidaymakers	<p><i>Focus on broadening and modernizing relaxation with some limited water and social activities</i></p> <ul style="list-style-type: none"> • Good variety and quality of mid-range accommodation to revitalize existing markets • Water-based and cultural experiences to cater for existing markets and encourage repeat visitation 	<ul style="list-style-type: none"> • <i>Upgraded TDA</i> with emphasis on visitor infrastructure and hygiene. • <i>Refurbish mid-range hotels and resorts</i> with emphasis on relaxation, reliable food service, safety and security. • <i>Expanded range and quality of half and full-day excursions</i> with focus on history/culture, comfort and safety, upgraded craft markets and river-based excursions. • <i>Improved dining and food options</i> in close proximity to hotel districts as well as river-cruise dining. • <i>Development of spa and wellness facilities and skills</i>, including upskilling of training of spa therapists, training in preparation of healthy menus and dishes.
Cruise travellers	<p><i>Focus on building the range and quality of short excursions, restaurants, craft markets and cultural interactions</i></p> <ul style="list-style-type: none"> • High-quality cruise berthing, reception terminal and immigration facilities. • River-based activities to enhance appeal and increase disembarkation rates. 	<ul style="list-style-type: none"> • <i>Expanded range and quality of half-day excursions</i> around Banjul and beyond with focus on history/culture, comfort and safety including upgraded craft markets and up-river excursions. • <i>Improved dining options</i> including specialised culinary emersion experiences and river-cruise dining. • <i>Efficient and reliable transport</i> with emphasis on reliability, safety and comfort.

3.8 Strategic goals

Based on the challenges and opportunities identified in the situational analysis and the vision, marketing principles, objectives, brand framework and target market and product directives outlined above, the following 3 core goals will be pursued, as outlined in Figure 16 below.

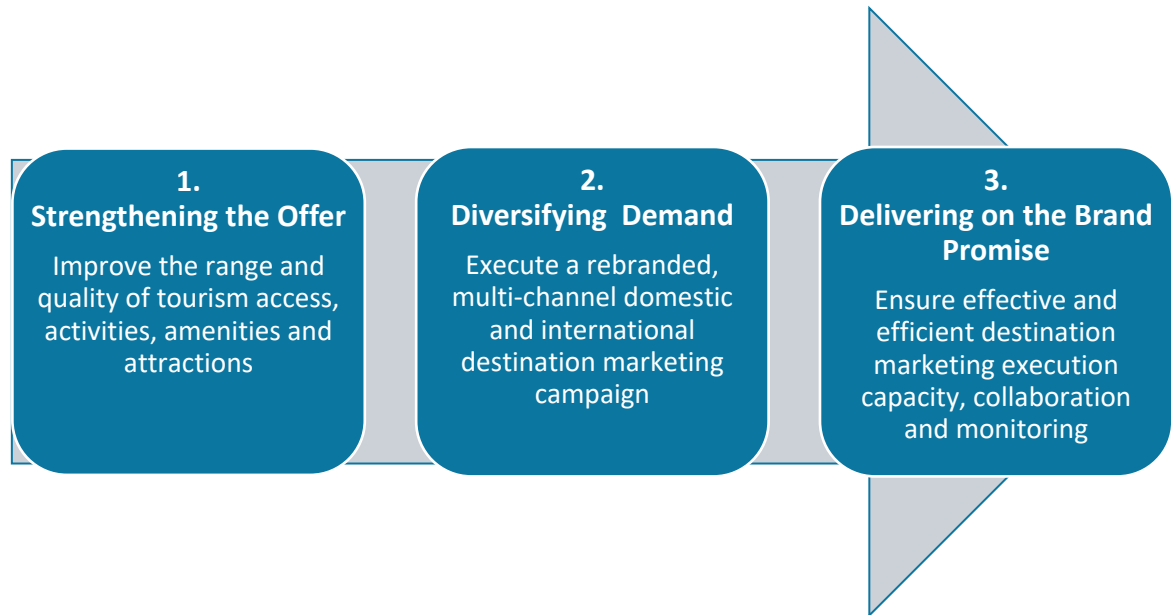


Figure 16 Marketing and investment promotion strategic goals

4 Growth strategies and actions

The 3 core goals will be pursued through executing the following strategies and actions.

4.1 Goal 1: Strengthening the offer. Improve the range and quality of tourism access, activities, amenities and attractions

The Gambia is an established destination with an appeal that is focused on sun, sea and sand elements. However, it has several powerful endowments which provide opportunities to extend its appeal to existing markets while building attraction to new and emerging markets. To capitalise on these opportunities, The Gambia must improve access both to and within the country, widen the range and quality of attractions and spread them more evenly throughout the country. The River Gambia offers a powerful unifying element to strengthening the overall offer.

The strategies and actions outlined below, will be executed.

4.1.1 Strategy 1.1 Increase year-round air access capacity and affordability

The Gambia is close to large European markets with compatible time zone variations. However, its reliance on charter operators restricts its ability to attract new airlines, open new routes and consequently build capacity and frequency. It also limits flexibility in scheduling and pricing. Services by major scheduled airlines have been inconsistent while airport conditions such as apron capacity and safety issues such as the risk of bird-strike further dampen the appeal to expanding air services.

While limited access is recognised as a major obstacle to building demand, previous initiatives such as reducing charges have had limited success. The Gambia needs to implement an urgent Route Development Strategy and prepare a Medium-Term Air Access Plan, backed by an effective regime of competitive and targeted incentives to build and retain demand across a range of partner airlines and destinations.

The following actions will be executed to stimulate year-round air access.

4.1.1.1 Actions

a) Re-activate and capacitate the Gambia Air Access Initiative (GAAI)

At the time of its development the Gambia Air Access Initiative identified several actions for improving air access but has since lost momentum. A standing working group including Gambia Civil Aviation Authority (GCAA), GTB, travel agencies, and business organisations will help create a unified and ongoing approach to addressing aviation issues. It should be tasked with making recommending to all appropriate government agencies on actions needed to improve air access to The Gambia.

To activate the GAAI the GCAA will:

- Draft formal Terms of Reference for the GAAI with clear mission statement, objectives, reporting timelines and accountabilities.

- Identify suitable participants and issue letters of appointment with clear terms of engagement including definition of expected contributions of each participant.
- Arrange and chair a first meeting of the reactivated GAAI

b) Prepare and implement a three-year route development strategy

GCAA, in partnership with GT Board and the National Air Access Committee, should be tasked and resourced to prepare a Route Development Strategy with the objective of securing and retaining one new airline over the next three years.

The Strategy should be based on key demand drivers and sound market research and analysis including analysis of aviation data (catchment areas, passenger traffic, fare and route analysis) and market insights from GT Board, tour operators and travelers to identify and measure growth opportunities. It should identify routes, origin cities, airlines, aircraft types, service frequencies and contract periods which present the most potential for The Gambia. The strategy should identify actions required to stimulate airline interest including targeted incentives to reduce airline costs (including reducing or removing passenger and freight airport charges, waived landing, refueling and gate fees, subsidised costs for crew overnighing) and specific marketing initiatives to stimulate demand (including multi-channel marketing campaigns, joint marketing initiatives and special promotions). It should include detailed costings, clear monitoring mechanisms and KPIs to measure route success.

The Strategy should be prepared by professional consultants and result in a sound business case to serve as the basis for commencing negotiations with target airlines within six months. GCAA and GT Board will:

- Prepare terms of reference, secure funding and procure professional consultants to prepare the Strategy and present it for approval of government.
- Establish an implementation Task Force to implement the Strategy over the next three years including authorization to negotiate with airlines and initiate approvals including air service agreements, airport access, slot allocations.
- Monitor results and report annually on the implementation of the approved Strategy.

c) Develop a medium-term air access plan

GCAA in partnership with MOTWI, GTB and the National Air Access Committee should be tasked and resourced to review the “Plan of Action for the Re-emergence and Recovery of the Air Transport Sector” (contained in Annex 3 of the “*National Tourism Policy and Strategy of The Gambia (2023-2032)*”) and prepare a comprehensive Air Access Plan to manage the development of air access to The Gambia over the next five years.

The Plan should incorporate the results of the Route Development Strategy and lay out the long-term goals and actions required to attract and retain new airlines, manage long term route development, enhance travel facilitation and improve the traveler experience through Banjul International Airport including identifying infrastructure improvements such as safety and security conditions to make the destination more appealing to both airlines and passengers.

This Plan should be developed in partnership with the GAAI and GT Board and the National Air Access Committee be prepared by professional consultants and include preliminary costings and timelines to implement priority initiatives. GCAA will:

- Prepare terms of reference, secure funding and procure professional consultants to prepare the Plan and present it for approval of government.
- Arrange for the Plan to be presented and consulted with the GAAI.
- Monitor results and report annually on the implementation of the approved Plan.

d) **Conduct and table for approval professional feasibility studies for priority initiatives in the approved Air Access Plan**

In partnership with GAAI, the GCAA will be tasked and resourced to carry out detailed feasibility and cost benefit studies of priority initiatives identified the Air Access Strategy including hard and soft infrastructure. These studies should recommend actions and accountabilities which GCAA can take forward for approval and budgetary allocations. In this regard the GCAA will be responsible for:

- Allocating resources to include a scheduled program of feasibility and cost benefit studies to evaluate the initiatives in the approved Air Access Strategy.
- Based on the results of the studies, making recommendations to the government for approval and budgetary allocations for the implementation of approved Air Access Strategy initiatives.
- Monitoring the implementation of the approved Air Access Strategy initiatives and regularly report progress against agreed objectives to the government.

e) **Maintain the standing dialogue with existing and targeted partner airlines**

Engagement on a regular basis is essential to maintaining strong relationships with existing and potential airline partners and can help to identify opportunities for new routes while addressing concerns and initiating early remedial actions. To facilitate the dialogue the GCAA will undertake the following activities:

- Maintaining the existing airline partner dialogue forum as a standing engagement and align its agenda to the outcomes of the Air Access Strategy with clear deliverables and accountabilities.
- Reporting to the government annually on the activities, results and outcomes of the standing dialogue.

4.1.2 Strategy 1.2 Package, present and promote attractions and experiences to match investor and target market requirements

The Gambia needs and effective and efficient mechanism for identifying, evaluating and packaging attractions and experiences and presenting them to the investment community in a compelling and attractive manner. This requires harnessing market, strategic, technical and commercial inputs to prioritize opportunities, a sound investment promotion and outreach strategy to take selected opportunities to market and an effective coordination mechanism to manage the process. This strategy seeks to strengthen the process for mobilizing all new tourism

investments. However, priority should be given to those investments which will most contribute to diversifying demand as outlined in Strategies 1.4 – 1.6 below including river-based tourism and nature-based tourism.

It should be noted that while the preparation of a tourism investment and outreach strategy is a separate deliverable of this engagement which will follow the finalization of this strategy, it will be important for The Gambia to continually monitor and update this as a living document going forward.

4.1.2.1 Actions

a) Establish formal protocols and tools for the coordination of tourism investment promotion and collaboration across agencies

GIEPA and GTB will take the lead in the following activities:

- Identifying all agencies with a role in tourism investment promotion including GTB, GIEPA, GBS, Public Private Partnership Unit.
- Formulating formal agreements between all agencies involved in tourism investment promotion including drafting, negotiating and finalising agreements which outline the roles, responsibilities and collaboration mechanisms among the agencies.
- Organising joint training sessions to build tourism investment and investor management skills including identifying training needs, developing training materials, and conducting workshops and seminars for the staff of all involved agencies.
- Developing a common database for key industry statistics and performance indicators including identifying relevant data points, designing the database structure, and ensuring data collection and entry processes are standardised across agencies.
- Creating a common data platform for sharing information and promoting investment opportunities to the investor community including selecting a suitable platform, developing the necessary software, or web applications and ensuring sufficient data sharing protocols are in place.

b) Assemble a targeted list of investment-ready tourism opportunities which align with the market development strategy

GTB will prepare a list of marketable opportunities by taking the following actions:

- Identifying a list attractions and experiences that align with the tourism marketing strategy.
- Establishing clear criteria for prioritising the list, including the strength of market demand, commercial viability sustainability, ease of development and overall impact.
- Developing a list of pre-qualified attractions and experiences that meet the established criteria to serve as the foundation for investment ready projects.
- Developing a list of investment ready projects by working on the pre-qualified list by creating detailed business plans, financial projections, and marketing strategies for each project.

c) Develop and maintain a targeted tourism investment strategy and well-resourced outreach plan to identify and attract specific investors for selected opportunities

To ensure effective outreach and promotion of marketable investment opportunities GIEPA and GT Board will work together in:

- Establishing clear criteria for the types of investors that are suitable for the prioritised projects including examining their investment history, financial stability and alignment with the agreed tourism marketing strategy for The Gambia.
- Identifying potential sources of investment by conducting market research to pinpoint investors are interested in tourism investments and have the financial capacity to invest.
- Developing mechanisms for approaching the market including marketing materials, outreach events and identifying appropriate communication channels to reach potential investors.
- Defining and gathering supporting data and materials including key industry statistics, performance indicators, market demand studies and detailed business plans for investment-ready projects.
- Determining staffing, skills and resources that are needed to implement the strategy.
- Setting clear targets for investment values and outcomes including goals for the amount, type and location of investment and the expected impact on the tourism sector and establishing an agreed mechanism for monitoring and reporting on the implementation of the strategy.

d) Develop and maintain collateral materials to support the tourism investment outreach plan

GIEPA and GT Board will work together to package a professional portfolio of selected investment opportunities and mobilise the outreach plan, among others by:

- Identifying creative design and publishing specialists with proven track record in creating high-quality digital and hard copy formats for distribution through channels identified in the investment promotion strategy including websites, events, meetings advertisements, and specialised publications. All collateral will be consistent with the new destination branding themes and formats.
- Preparing design brief outlining objectives, target audiences, key messages and branding guidelines.
- Calling for proposals, commissioning designers and collaborating with designers and publishing specialists to agree all materials.
- Approving production of all digital materials for on-line distribution through websites, social media, and email campaigns, and hard copy materials for distribution at events, meetings, advertisements and specialised campaigns.

e) Actively promote the investment-ready opportunities to the investment community in line with the agreed tourism investment strategy

GT Board and GIEPA will actively promote the investment opportunities in partnership with other relevant agencies by:

- Assembling, publishing and distributing all tailored marketing materials to the appropriate platforms and media in accordance with the investment strategy and agreed promotional campaigns.
- Managing the common data platform as a means of presenting investment-ready projects.
- Organising investor outreach events, meetings, campaigns and programs.
- Establishing and maintaining regular communication with potential investors.

4.1.3 Strategy 1.3 Adopt and promote sustainable, regenerative and community-based tourism practices

The Gambia’s natural and cultural heritage are its most important tourism resources. However, its valuable Protected Areas (PAs), beaches and forests are under severe threat of depletion and irreparable damage through poor maintenance, deforestation and other destructive practices. These resources need to be sustainably managed by communities and the different stakeholders involved. The MoTAC and GT Board will adopt and promote sustainable and regenerative tourism practices related to coastal and protected area planning for tourism, natural resource use, waste management, renewable energy, climate adaptation for tourism, community inclusiveness, gender and youth empowerment and recognition of indigenous knowledge, among others.

4.1.3.1 Actions

a) Formulate and adopt sustainable and regenerative tourism guidelines

The guidelines will be based on the Global Sustainable Tourism Council (GSTC) industry criteria for Hotels, Tour Operators and MICE.

- The GT Board will extract and document a suitable set of guidelines that are applicable to The Gambia tourism industry. The guidelines will be developed in close association with industry bodies and local NGOs.
- The agreed guidelines will be formally adopted by the Ministry and GT Board and made available on the GT Board’s website and communicated to the industry through a concerted media communication campaign.

See: <https://www.gstcouncil.org/gstc-criteria/>

The GSTC Criteria serve as the global standards for sustainability in travel and tourism. The Criteria are used for education and awareness-raising, policy-making for businesses and government agencies and other organization types, measurement and evaluation, and as a basis for certification.

They are the result of a worldwide effort to develop a common language about sustainability in tourism. They are arranged in four pillars:

- Sustainable management
- Socioeconomic impacts
- Cultural impacts
- Environmental impacts (including consumption of resources, reducing pollution, and conserving biodiversity and landscapes)

Since tourism destinations each have their own culture, environment, customs, and laws, the Criteria are designed to be adapted to local conditions and supplemented by additional criteria for the specific location and activity. The GSTC Criteria indicate what should be done, not how to do it or whether the goal has been achieved. This role is fulfilled by performance indicators, associated educational materials, and access to tools for implementation, all of which are an indispensable complement to the GSTC Criteria.

- In pursuit of regenerative tourism (i.e. going beyond sustainability by aiming not just to minimise harm, but to leave a place better than it was before), GT Board and private operators will engage local communities in decision-making, support locally owned businesses, and invest in heritage restoration initiatives. This could e.g. include hands-on visitor participation in reforestation, wildlife protection, or cultural revitalisation projects.

b) Strengthen capacity and knowledge in GT Board to promote and implement the sustainable and regenerative tourism guidelines

GT Board will develop the internal knowledge and capacity to be a leader in promoting the principles and practices of sustainable and regenerative tourism, among others by:

- Appointing a dedicated staff members(s) to focus on the advancement and promotion of sustainable tourism. The appointed expert(s) will receive intensive training in sustainable tourism and the application of the guidelines.
- Providing training to all GT Board expert staff in the scope and application of the sustainable and regenerative tourism guidelines.
- Developing and formally adopting and possibly legislating a set of sustainable and regenerative tourism guidelines that will be applied in planning and approving all tourism developments and in managing tourism development areas. Such guidelines could be derived from those published by the GSTC or other schemes such as Green Destinations (www.greendestinations.org).

c) Launch a dedicated industry-wide sustainable and regenerative tourism drive

To promote the application of sustainable and regenerative tourism in The Gambia's tourism sector, GT Board, possibly in association with expert service providers, will be responsible for:

- Conducting an intensive communication drive among private tourism providers (hospitality providers, tour operators, guides and other relevant businesses) as well as relevant MDA's (e.g. those responsible for environmental management and protection, cultural and heritage management, community services and investment promotion) promote the application of the sustainable and regenerative tourism guidelines. This should include promotion of on-line sustainability and regenerative tourism training for hotels and restaurants available through the World Bank funded 'Green Academy' initiative and encouraging operators to devise itineraries and activities that include environmental, cultural and social improvement.
- Introduce a special recognition mechanism (e.g. certificate of appreciation or decal), which will be awarded to those businesses and organisations that have signed up and pledged their commitment to implementing the guidelines and that have implemented at least 70% or more of the guidelines. Businesses will be able to display the official decal on their business premises and on their marketing materials in recognition of their commitment to sustainable development.

f) **Support tourism businesses to join a suitable sustainability accreditation scheme**

To assist tourism businesses in their quest for sustainable tourism management MoTAC will partner with international development organisations in providing those businesses that demonstrate a commitment to sustainable and regenerative tourism operations. Businesses will be supported and encouraged to embrace suitable sustainability accreditation schemes.

Such assistance will be preceded by a feasibility study and implementation plan with viable recommendations for introducing support measures such special subsidies or tax benefits to support businesses in implementing sustainable waste management, renewable energy and water management technologies in their operations.

g) **Establish environmental management standards for tourism areas**

To ensure the sustainable and regenerative development of tourism areas, GT Board will work with relevant MDAs to develop standards for the management of specific environmental risks in TDAs and other tourism development areas including waste management, access to reliable water supplies and risks of inundation. The guidelines proposed under b) above be incorporated in such standards.

4.1.4 Strategy 1.4 Improve river-based tourism facilities, services and experiences

While The River Gambia is an iconic and powerful element in the country's brand and identity, its significant tourism potential remains largely underutilised. In addition to being an attraction in its own right, the river is also the key to linking attractions and building circuits which will strengthen the overall tourism offer. By improving ease of access, the safety and reliability of travel and the range of river-based activities, The River Gambia will become a centrepiece for nature-based tourism development, a pathway to unlock new up-country travel experiences and a desirable means to reach them.

Actions to advance river-based tourism will include the following, among others.

4.1.4.1 Actions

a) **GT Board to establish a specialised role as River Tourism Product Manager**

GT Board will be responsible for managing the development of The River Gambia as a featured attraction area within The Gambia's tourism portfolio. This roles will, among others entail:

- Approving the establishment of the position as a Senior Technical Manager within the GT Board's Product Development Department.
- Defining the role and responsibilities in a clear job description responsible for developing and managing the range of products and services related to river-based tourism, providing input to marketing and promotional activities and establishing strong relationships with key stakeholders including local communities, other government agencies and tourism operators.

b) Prepare a River Gambia Tourism Strategy and Development Plan

To develop The River Gambia as an experiential tourism attraction zone and an anchor attraction for The Gambia, GT Board will:

- Draw on existing studies and work closely with the Gambia Maritime Administration (GMA), the National Environment Agency (NEA) and the Department of Parks and Wildlife Management (NPWM) to leverage existing studies and expertise.
- Conduct market research to identify segments of demand for a range of appropriate marine-based recreational activities (such as day and overnight cruising, sports fishing and ecotours).
- Identify suitable zones for concentrating activities to help manage the flow of tourists and ensure the sustainable use of the river.
- Identify key locations for passenger services including passenger pick-up and set-down points including determining strategic points for ferry terminals, boat moorings, boarding jetties, boat ramps.
- Determine the nature, scale and location of necessary infrastructure along the river including access roads, car parking, provisioning facilities, marine servicing and storage facilities, utility connections and passenger waiting areas.
- Examine options and make a recommendation for developing a central focal point for marine access in Banjul such as at Denton Bridge or other suitable location which can serve as the main gateway to the river for recreation purposes.
- Present the Strategy and Development Plan including recommendations for the scale and timing of capital requirements to meet the infrastructure needs of the plan for government approval.

c) Develop infrastructure to facilitate access and enable river-based tourism

Based on the content of the approved Strategy and Development Plan, GT Board will conduct feasibility studies for the various infrastructure components needed to implement the Strategy.

A Development Plan will be formulated to ensure their viability and sustainability and prepare recommendations to the government for their approval and financing including the use of private public partnerships.

GT Board will work closely with other agencies such as GMA, NEA, NPWM, Ministry of Transport Works, Construction and Infrastructure (MOWCI), Ministry of Lands and Regional Government (LRG) to implement the approved plan.

d) Prepare a River Gambia Tourism Management Plan to manage tourism activities on the river

The GT Board will work with the GMA, NEA and the DPWM to prepare a tourism management plan to govern the management of tourism activities in line with The River Gambia Tourism Strategy and Development Plan. The preparation of the plan will include:

- Establishing acceptable levels and activity types for visitor traffic in identifiable zones along the river.

- Developing measures to protect the river ecosystem from potential harm caused by tourism activities.
- Establishing health and safety protocols to ensure the well-being of visitors, marine traffic and communities on the river.
- Engaging with local communities, tourism operators and other stakeholders to gather input and ensure their support for the management plan.

e) **Carry out research and feasibility studies for a range of potential day and overnight river cruise experiences**

The GT Board's River Tourism Product Manager will identify, evaluate and assess river-based tourism product opportunities by:

- Conducting market research to identify potential demand including analysing tourist preferences, examining competitor offerings in other countries to identify best practices and potential competitor advantages and evaluating market trends to understand target audiences and their preferences.
- Assessing likely environmental impacts of proposed river cruise activities to ensure they do not harm the ecosystem including impacts on wildlife, water quality and surrounding habitats.
- Preparing pre-feasibility studies of targeted tourism investment opportunities including technical, operational and financial considerations resulting in sound commercial investment proposals which can be taken to the market.

f) **Package prospective investment opportunities and promote these to targeted investors.**

In line with Strategy 1.2, the GT Board will partner with GIEPA to package selected investment opportunities and present them to investors.

This will include:

- Identifying prospective investors with suitable skills and experience and capacity to invest.
- Creating detailed investment packages for selected opportunities including business plans, market analysis and projected returns.
- Identifying strategies for reaching investors such as investor meetings, conferences, hosted investor visits to showcase opportunities.
- Securing investor commitments, facilitating approvals and licensing agreements.

4.1.5 Strategy 1.5 Develop new nature-based tourism facilities, services and experiences

The Gambia has abundant wildlife and large areas dedicated as National Parks and Protected Areas. However, it lacks an iconic safari product, high-quality wildlife experiences and well-developed outdoor active adventure activities. Rather than compete with traditional East and

Southern Africa safari destinations, The Gambia should include safari experiences as part of its nature-based offering and capture demand that it is currently losing to Fathala.

By developing and packaging high-quality, well-supported nature-based products and experiences, The Gambia will expand the range of competitive tourism options, strengthen its offer to traditional markets and repeat visitors while unlocking demand from new and emerging market segments including ecotourists, outdoor adventure enthusiasts and tailored explorers.

The following actions will be undertaken in this regard.

4.1.5.1 Actions

a) Establish a specialised position for nature-based tourism development

To advance nature-based tourism to the next level, GT Board will create a specialised role responsible for managing nature-based tourism as a featured product among The Gambia's tourism portfolio. This will entail:

- Approving the establishment of the position as a Senior Officer for nature-based tourism development within GT Board's Product Development Department.
- Defining the role and responsibilities in a clear job description responsible for developing and managing the range of products and services related to nature-based tourism, providing input to marketing and promotional activities and establishing strong relationships with key stakeholders including local communities, other government agencies and tourism operators.]
- Setting up, in association with GT Board's Quality Control inspectorate, effective and efficient law enforcement capacity to prevent poaching, illegal hunting, illegal deforestation and other illegal activities that impact negatively on the country's nature-based tourism resources and potential.

b) Establish Kiang West National Park as a fully developed wildlife park experience and visitor attraction

Visitors to The Gambia have shown a keen interest in visiting the Fathala Wildlife Reserve in Senegal and this has led to a substantial leakage of potential tourism revenue for The Gambia. Establishing Kiang West National Park (KWNP) as an iconic nature-based tourism product will contribute to revenue growth by recapturing this spending within the country. Positioning the Park as a gateway to nearby nature-based experiences will create multi-day itineraries, increasing visitor stays and spending while generating employment opportunities in park management, hospitality, tour guiding, and conservation programs which will benefit local communities. By engaging private investors, and tourism organizations, KWNP can attract funding for infrastructure, wildlife conservation, management and visitor services which will enhance the overall experience, attract higher-value tourists and contribute to the branding and international recognition of The Gambia as a premier nature-based destination. Leveraging private sector investment through concessions and partnerships will ensure financial sustainability and operational efficiency.

GT Board will work closely with the NEA and NPWM to identify and evaluate development options for establishing Kiang West National Park as an internationally competitive wildlife

park and as a stand-alone destination and gateway to other nearby nature-based experiences. This will include:

- Engaging with international nature-based tourism organisations and private investors to identify and evaluate development options, including the feasibility of restocking wildlife populations, establishing competitive accommodation and redeveloping the national park headquarters.
- Implementing a wildlife restocking program including sourcing and reintroducing native species, and ensuring their sustainable management.
- Developing concepts for high-quality accommodation within the park to serve as a base for longer staying visitors including lodges, eco-friendly cabins, and camping sites that offer comfortable and sustainable lodging options to a range of markets including domestic travelers.
- Preparing plans for redeveloping the National Park Headquarters into a year-round research, education and visitor center including upgraded facilities, interactive exhibits and providing educational programs for visitors.
- Developing tours and itineraries that position Kiang West National Park as a stepping off point for visitors to explore other nature-based experiences in the Lower River Region including Bao Bolong Wetland Reserve, Bintang Bolong Tributary and nearby forest parks.
- Examining opportunities to leverage private sector investment through partnerships in park and wildlife management, accommodation and visitor services concessions including identifying potential investors, negotiating agreements, and facilitating approvals and licensing.

c) Strengthen the visitor experience at selected existing nature-based locations

The Gambia currently offers nature-based experiences at several nature reserves and national parks that are close to Banjul including Niimi National Park and Abuco Nature Reserve. While popular with guests, they lack the infrastructure and services needed to deliver consistent high-quality tourism experiences. GT Board will work closely with the NEA and NPWM through:

- Identifying selected nature-based products which need support and prioritize in line with target markets and available resources.
- Identifying infrastructure and services improvements required at each location to define more specific tourism themes and experiences linked to current and target market segments.
- Mobilising investments needed to realize product improvements.
- Preparing suitable packages in partnership with tour operators.
- Actively marketing tour packages through exiting distribution networks.

d) Establish a national network of community-based trails to attract ecotourism and outdoor adventure markets.

Given the geographically contained and safe environment offered, The Gambia has substantial potential as a community-based hiking and biking destinations. GT Board's

Product Development Department will work closely with other relevant agencies and local communities in:

- Further developing The Ninki Nanka Trail as a national flagship product which embodies The Gambia's blend of nature, culture, and adventure tourism.
- Identifying and developing a series of suitable adventure trails including kayaking, hiking, biking and camping routes along The River Gambia incorporating both land and river-based itineraries and including.
- Developing comprehensive trail information packages including maps, on-line briefing materials, codes of conduct to help self-guided travelers explore at their own pace.
- Developing necessary trail support facilities such as camping areas, community-based tourism experiences and homestay facilities in partnerships with local communities to ensure sustainable and inclusive tourism experiences.
- Recruiting, training and deploying knowledgeable tour guides who can lead supported tours and qualified trail rangers to monitor trail conditions, assist travelers and maintain safe travel conditions.
- Developing and implementing marketing strategies to promote the adventure trails to target outdoor adventure markets.

4.1.6 Strategy 1.6 Strengthen existing core tourism products and experiences

In addition to creating new and diversified experiences The Gambia must also protect its existing tourism infrastructure and product offerings to retain and expand existing markets. Much of this is in poor condition and in need of new investment to remain competitive while specialized segments like birding and cruise tourism need support to capture growing demand. In the TDA, several hotels need upgrading and reinvestment, while improvements are also required to tourism infrastructure such as street lighting and furniture, maintenance of roads and walkways and waste management.

Infrastructure at the UNESCO sites at Jufereh and Albreda is in poor condition as are the facilities at James Island. While the World Heritage Sites are the subject of an existing improvement plan, The Gambia's leading cultural event, the International Roots Festival requires rejuvenation.

The following actions will be undertaken in this regard.

4.1.6.1 Actions

a) Establish an infrastructure upgrading and improvement program for the TDA

The TDA represents the face of tourism of The Gambia and a visitor friendly TDA is particularly important for retaining The Gambia's competitiveness in the packaged holiday market and encouraging visitors to explore and spend money outside of the confines of their resorts. GT Board will focus on improving the TDA by, among others:

- Developing and implementing a TDA beautification and infrastructure improvement plan including identifying funding sources to supplement existing budget allocations.
- Exploring the development of a contestable revolving fund to enable TDA hotels to upgrade and refurbish their facilities.

h) Strengthen Gambia's birding products and support services

The Gambia is known to have a comparative advantage in the variety and concentration of bird species. Birding is already an important niche market for the country and the birding offer will be further developed and improved. This will be done by:

- Developing and implementing an integrated product development plan for the birding sector. The plan will identify market requirements, investments in infrastructure such as equipment, viewing stations and hides at key locations, quality standards as well as training needs and accreditation requirements.
- Funding the implementation of the plan through a combination of public and private sector funding, with the Government providing public infrastructures and amenities and private sector partners maintaining and operating the facilities to ensure their sustainability.

i) Improve cruise infrastructure and support services

While The Gambia currently receives a number of cruise vessels on their north-south journeys, the Port of Banjul's capacity is limited by draft restrictions and it does not have dedicated cruise facilities. While the port may not be able to receive large cruise ships, The Gambia could leverage better value from existing cruises by expanding the range and quality of visitor services and experiences. Key visitor gaps will be addressed by:

- Preparing a cruise sector support plan to strengthen The Gambia's attraction to the cruise sector and to encourage increased rates of disembarkation including improvements to port infrastructure and terminal facilities, clearance procedures, transfers and tour packages and pricing.

j) Reestablish the International Roots Festival as an iconic cultural attraction

GT Board will work with the National Center for Arts and Culture to re-establish the Roots Homecoming Festival during the shoulder season months of April or October, as an internationally recognised culturally vibrant key brand equity of The Gambia by:

- Designing a market led and financially viable structure and format to reestablish the International Roots Festival.
- Soliciting private event organizing partners and sponsors to secure the financial sustainability of the event.

4.2 Goal 2: Diversifying demand. Execute a rebranded, multi-channel domestic and international destination marketing campaign

As indicated above the strategic vision and underlying principles are geared at developing a wider variety of attractions and experiences and promoting these to attract a greater diversity of traveller segments, in addition to the existing sun, sea and sand seekers. The targeted market segments will take centre stage in the GT Board's promotional programmes over the next five years, as outlined in the strategies and actions below. The aim will be to reach targeted audiences with appealing and on-brand messaging.

The diversified positioning and experiential brand "Smiling Coast. Friendly River" will be activated through multi-year, multi-channel international and domestic promotional campaigns with a strong theme and calls to action. To reinforce the brand strategy the international and domestic campaigns should be aligned to the opening phrase of the brand promise, i.e. "My Smile Welcomes You".

The campaigns will serve as vehicles for coordinating all promotional activities, including PR, advertising, travel trade partnerships, special promotions and digital marketing behind common and integrated marketing themes and messages.

The following sections outline the campaign concepts and approaches that will be adopted in executing the campaign at international and domestic levels. Specific strategies and actions are outlined in *Sections 4.2.1 to 4.2.6* (Strategies 2.1 to 2.6) below.

#FindMySmile international marketing campaign

The campaign pivots on a singular, yet powerfully evocative idea: in today's fast-paced, often disconnected world, The Gambia is the place where you can rediscover your joy for life. Anchored by the brand's identity, this campaign celebrates The Gambia's unique blend of pristine beaches, the vibrant life of its river, and its rich cultural tapestry.

At its heart, "Find Your Smile in The Gambia" is more than a call to visit—it's an invitation to reclaim joy and authenticity. Digital isolation and constant connectivity leave many yearning for genuine human moments. The Gambia offers an experiential antidote.

This campaign, built around the "smile" theme, will leverage both humour and heartfelt storytelling to resonate across diverse audiences. By positioning The Gambia as a global hub for rediscovering happiness, the campaign not only highlights the destination's natural and cultural assets but also aligns with a deeper, universal need: the quest for genuine connection.

With a multi-year vision, the campaign begins by sparking curiosity and excitement, then deepens emotional bonds through user-generated content and immersive storytelling, and finally, positions The Gambia as a pioneer in promoting well-being through travel.

"Find your smile in The Gambia" recognises today's travellers crave more than just a holiday—they seek meaningful experiences that rejuvenate the spirit.

Specific messages will centre on promoting all the USPs and potential activities mentioned in Section 3.4: Market Positioning.

A consistent campaign theme e.g. "#FindMySmile will be used as an umbrella invitation and as a communication theme for all tourism promotion activities. The campaign will be activated in three stages over a 5-year period, through both travel trade and media exposure and partnerships, and consumer-focused (mainly digital) marketing.

The following campaign phasing will broadly be followed, with a special focus on the non-charter tourism season:

- Stage 1 (Years 1 and 2): *Building destination brand awareness and interest* among target markets of The Gambia as a experiential, multi-faceted destination where travellers will rediscover joy for life.
- Stage 2 (Years 3 and 4): *Growing target market desire for and conversion* of experiential, activity-based and wellness tourism.
- Stage 3 (Year 5 onwards): *Sustaining growth and innovation*, especially in respect of sustainable and regenerative tourism.

From a *trade and media marketing perspective* a refocused marketing and sales strategy will be followed to identify potential tour operators, travel agents, airlines and MICE intermediaries that deal with the various target market segments identified in the strategy. The campaign will focus on raising awareness of the full diversity of experiences on offer, solicit the inclusion and expansion of The Gambia in tour offers, and familiarise and educate travel agents on the nature and extent of experiences offered. This will be achieved through selective trade fair attendance, trade workshops, travel agent affiliation programmes and joint marketing initiatives in support of the campaign.

From a *consumer marketing perspective* the campaign will mainly (but not only) use *digital media* to focus on immersive storytelling, targeted digital outreach, and influencer collaborations. A compelling visual narrative—through short-form and long-form videos, interactive content, and high-quality imagery—will highlight the Gambia River’s unique appeal and the country’s rich cultural heritage. This content can be amplified through social media, YouTube, and ad campaigns targeting adventure seekers and cultural travellers in key source markets.

Partnering with mid-tier influencers, travel bloggers, and adventure storytellers will generate engaging content and increase organic reach and credibility. SEO-driven content, supported by strategic media placements, will further strengthen the destination’s visibility across key online travel platforms, positioning The Gambia as an emerging exploration hotspot in West Africa. Encouraging visitors to share their experiences through branded challenges and interactive promotions will create social proof and foster engagement.

#SmileGambia domestic marketing campaign

Domestic tourism could be an important backbone of the tourism sector and is less affected by international market fluctuations. Travel knowledge of the country also instils a sense of national brand pride. For tourism to become a sustainable, integral part of the economy and to be recognised as a potential entrepreneurial of career opportunity, the levels of domestic awareness and participation in tourism should be increased.

While the large majority of Gambians have been exposed to and/or in some way involved in tourism, all indications are that awareness of local tourism business opportunities, sustainable tourism management and employment potential is still low and that few Gambians engage in travel in their own country. There is also a significant resident expatriate population in The Gambia who could be encouraged to explore the country.

An overarching domestic tourism campaign in support of the brand promise, namely “*#SmileGambia*” will be launched to raise awareness of tourism and stimulate travel among Gambians and foreign residents. The campaign is underpinned by two main goals, namely:

- *Domestic travel stimulation:* Including marketing tourism experiences and destinations, as well as affordable packaged travel opportunities, to the domestic market.
- *Domestic tourism awareness raising:* Including communicating opportunities and benefits of tourism for all Gambians, the importance of welcoming visitors with a smile and providing excellent service and the responsibility of all citizens to advance sustainable and regenerative tourism.

The tactical actions of the domestic tourism campaign will be finalised in consultation with the industry and could include the aspects outlined in Strategy 2.6 below.

4.2.1 Strategy 2.1: Roll out the new destination brand

As described in Section 3.5 the destination brand has been refreshed and evolved to express and convey an evolved brand promise. Among others, the rebranding entails redesign of the logo, a changed destination slogan and application of a proposed visual language (design “look and feel”).

To give effect to the rebranding and as indicated in Sections 3.5.6 and 3.5.7 above:

- The brand visual designs and brand language need to be applied to all existing and new promotional collateral and
- Stakeholders need to be made of aware of and trained in how to effectively apply the brand in visual and written contexts, whether by GT Board as the main destination brand or by the tourism industry in a co-branded manner.

Rebranding will entail the following actions.

4.2.1.1 Actions

a) Apply the brand to destination marketing and information materials

Given the extent of application of the previous brand identity on signage, printed and digital media a two-step approach will be followed in rebranding existing marketing and information assets and identifying opportunities for new applications, as summarised in Figure 17 below.

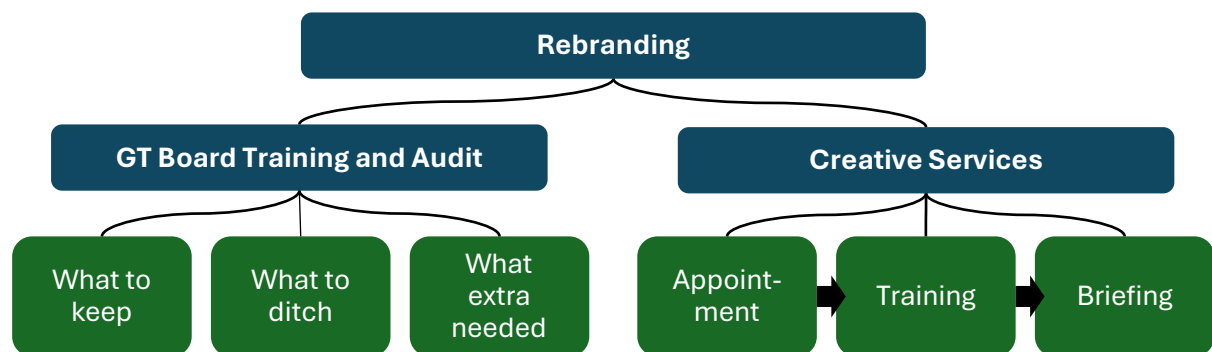


Figure 17 Process of rebranding marketing collateral

- As a first step, the GT Board management and relevant officials in charge of rebranding will be trained in the correct application of the brand in visual, written and spoken formats. Such training will include, among others:
 - Understanding of all aspects of the brand strategy.
 - Using and interpreting the brand manual.
 - Technical requirements for correctly applying the brand (placement, sizes, colours, etc.)
 - Brand communication guidelines.
 - Co-branding options and guidelines.
 - Setting up a brand approval mechanism (e.g. a rebranding workgroup or committee) to oversee the rebranding process and approve rebranded deliverables.
- Secondly, a thorough audit will be conducted to identify and scope all branded print, digital, signage and other marketing materials and tools that need to be rebranded and determine:
 - What should be kept and rebranded with the new branding.
 - What is redundant and should be discarded.
 - What additional collateral is required and should be produced, with a clear scoping of the nature and extent of such production.
 - In line with the strategy, a key item(s) should be the production of powerful video footage to showcase the diverse range of attractions and interactive experiences on offer and the welcoming, vibrant culture of Gambians.
- Once there is fair clarity of the nature and extent of brand application, a creative services provider(s) will be appointed through a suitable procurement process to execute rebranding. This will include:
 - Preparing a Terms of Reference.
 - Having a briefing and orientation session with prospective service providers who have expressed interest in the assignment.
 - Receiving and evaluating proposals based on a on agreed criteria which could include, among others:
 - Interpretation of the brief.
 - Understanding of the brand strategy and application of the brand manual.
 - Creative and delivery track record of similar assignments.
 - Cost.
 - Appointing and training a preferred service provider to ensure appropriate:
 - Understanding the brand strategy.
 - Applying the brand manual.
- Lastly, a digital brand hub will be created on the GT Board website, where stakeholders can access brand designs and templates, rebranded content and relevant visuals. The hub will contain all relevant brand design files and training materials, with the necessary application forms for using such materials in co-branding or applying the national brand.

b) Promote brand adoption by all relevant stakeholders

No matter how professional the brand strategy, designs and brand manuals are, they are only effective if activated and implemented. Brand application will only fully succeed if tourism-related public and private sector stakeholders join hands and voices in adopting and applying the brand.

A proactive process will be followed to activate and implement the approved brand application with the support of all relevant public and private sector stakeholders. The objective is to ensure widespread usage of the brand by tourism partners in the public and private sectors. This will include the following activities.

- *Developing stakeholder training materials:* A brand training toolkit will be developed aimed at the local travel trade, public sector stakeholders, the informal sector and other relevant stakeholders. This will include a desk-recorded or animated video(s), PowerPoint presentation(s), possibly a training workbook, media releases and other relevant support materials. Training materials should include specific modules for private-sector stakeholders to guide them on integrating the destination brand into their marketing efforts.
- *Conducting brand application training:* This will be kicked off by targeting all GT Board staff, overseas market representatives, government departments and agencies, private sector and community stakeholders. Targeted audiences are identified by GT Board and while such training should ideally occur on a face-to-face basis it could also be conducted virtually. Participants will be trained on how to use the brand for cooperative marketing campaigns, including joint promotions with GT Board.
- *Launching and promoting the new brand at suitable occasions and events.* A series of events will be identified as a opportunities to engage stakeholders with both presentations and meetings. These could include:
 - Local and international brand launch events, where the new brand will be communicated and the diversification strategy will be explained to Gambian stakeholders and the international travel trade.
 - Focused brand communication drives at trade events such as ITB and Experience Africa, to create awareness among the travel trade and media of the brand promise and brand messages.
 - Building in specific brand communication opportunities during trade familiarisation visits, media and journalist programmes, at meetings during trade shows, etc.

4.2.2 Strategy 2.2: Promote the #FindMySmile campaign among the travel trade

As indicated above the focus of travel trade and media marketing and partnerships will be on awareness creation and conversion of the Gambia as an experience-rich tourism destination. #FindMySmile will set out to convey to the international travel trade and media the experiential tourism possibilities on offer in The Gambia and to ensure increased exposure and travel conversion of targeted market segments.

The global travel trade and media landscape is increasingly competitive, requiring destinations to adopt a more targeted, cost-effective approach to engagement. With finite resources, The Gambia must focus its efforts on high-impact activities that drive tangible results, ensuring maximum return on investment. This strategy prioritises quality over quantity, concentrating on key trade events, strengthening industry relationships, and leveraging public-private sector collaboration to amplify marketing efforts.

Rather than maintaining a broad, resource-intensive marketing initiatives, this strategy ensures that The Gambia remains top of mind by integrating strategic trade partnerships, a structured PR framework and a data-driven approach to engagement.

The foundation of The Gambia's trade strategy rests on cultivating deeper, more productive relationships with a carefully curated selection of high-potential tour operators across key source markets, niche segments and the private sector located within The Gambia. This strategic initiative transforms The Gambia's trade engagement from transactional to relational, recognising that sustained growth comes from nurturing fewer, stronger partnerships rather than maintaining many superficial connections.

- *Measurable growth in arrivals and spend:* Each strategic partnership yields trackable increases in visitor numbers, with year-on-year growth targets established for each operator relationship.
- *Product diversification:* Selected operators expand their Gambia offerings beyond traditional beach packages to include river experiences, cultural immersion, and eco-tourism products, helping diversify the destination's visitor base and reduce seasonality.
- *Enhanced destination knowledge:* Partner operators demonstrate increased confidence and accuracy in selling The Gambia, with staff training completion rates above 80% and higher customer satisfaction scores for Gambia holidays.
- *Mutual investment:* Both The Gambia and partner operators commit resources to the relationship, with co-funded marketing activities generating a clear return on investment for both parties.
- *Sustained engagement:* Rather than sporadic, campaign-based communication, relationships with key partners feature regular touchpoints, collaborative problem-solving, and shared long-term planning.
- *Market intelligence exchange:* Strategic partners provide valuable insights on market trends and consumer behaviour, informing The Gambia's broader tourism strategy and product development.
- *Ambassador network:* Top operators become vocal advocates for The Gambia within the wider travel industry, organically extending the destination's trade reach through peer recommendations and positive word-of-mouth.

This initiative requires identifying the most promising tour operators in each priority source market, in terms of current booking volumes, market share trends, product alignment with our target segments, and potential for growth.

- Each strategic partner is assigned a relationship manager from the GT Board, who will serve as their primary point of contact, with half-yearly business reviews tracking performance metrics and identify new collaborative opportunities.
- For these select partners, we will develop a tiered support programme offering exclusive

benefits not available to general trade contacts. These include priority access to familiarisation trips, training for their sales teams and marketing assets.

The initiative also requires leveraging the relationships with and support from private sector based within The Gambia to, amongst others, contribute financial resources to joint marketing initiatives, participate in roadshows and workshops and initiating direct business-to-business engagements with their overseas trade partners that are aligned with the new product diversification and brand strategy.

The following travel trade and media marketing actions will be undertaken:

4.2.2.1 Actions

a) Integrate #FindMySmile in trade marketing activities

The national brand creative applications will be complemented by the #FindMySmile campaign theme through:

- A special visual design application of the campaign hashtag #FindMySmile, that will be used together with and complementary to the national brand identity and visual design language, for application on all GT Board trade marketing materials and platforms.
- Exhibition stands for major fairs, should prominently incorporate the “#FindMySmile” and its design language in the stand design, including pictures that display activities and experiences that are in tune with the positioning.
- A series of #FinMySmile campaign posters, desktop, floor, window displays and banners for use at special events will be produced, to be displayed as and where appropriate by GT Board, local tourism and accommodation providers and international trade partners.
- The #FindMySmile campaign will actively involve local private-sector stakeholders who will be encouraged to integrate the campaign into their promotional materials, websites and social media platforms to amplify reach and drive conversion.

b) Develop a centralised trade portal

The Gambia's Centralised Trade Portal will serve as a comprehensive digital hub where our trade partners can access everything they need to effectively sell the destination — from high-quality branded marketing materials to product information and training resources.

This initiative recognises that for most tour operators and travel agents, the ease of selling a destination directly impacts their likelihood of promoting it. By creating a single, intuitive platform that eliminates friction points in accessing information and support, The Gambia can enhance its competitiveness and ensure consistent, accurate destination representation across markets.

- *Increased trade engagement:* Trade partners regularly use the portal as their primary resource for Gambia-related information.
- *Improved knowledge and confidence:* Tour operators and travel agents demonstrate enhanced understanding of The Gambia's diverse offerings, with measurable increases in the number of certified Gambia Specialists in key markets.

- *Operational efficiency:* The GT Board staff spend less time responding to routine trade requests and more time on strategic relationship development, as partners self-serve for standard materials and information.
- *Content use:* High download and usage rates of marketing materials indicate that partners are actively incorporating Gambia content into their sales and marketing activities.
- *Product diversification:* Partners increasingly incorporate river experiences, cultural offerings, and eco-tourism products into their programming, demonstrating that the portal's content is successfully communicating The Gambia's full tourism portfolio.

The strategy requires a phased, user-centred approach to the portal's development, beginning with comprehensive consultation with selected trade partners about their needs and pain points. This research will inform a detailed functional specification focused on solving real trade partner challenges rather than simply showcasing information.

- The portal will feature both evergreen resources and #FindMySmile campaign materials, with a structured content calendar ensuring regular updates.
- The brand manual, brand designs and rebranded marketing collateral will be available for the trade to download and use, upon approval by GT Board.
- The integrated e-learning platform will offer modular, multimedia training about The Gambia, from basic destination knowledge to specialised modules on river tourism, cultural heritage, and sustainable travel practices.
- The portal will be built on a robust content management system that allows non-technical staff to update content without developer assistance, ensuring sustainability beyond the initial launch.
- Usage analytics will be continuously monitored to identify opportunities for improvement and optimisation, ensuring the portal evolves with trade partner needs.

c) Set up and maintain an international tour operator and agency database for email and social media communication

It is of utmost importance that GT Board builds up a database of tourism trade partners, other than existing charter operators in its various source markets. The database should be developed using a suitable Customer Relationship Management (CRM) software application. If this is not possible, a standard database application or spreadsheet format could also be used.

Establishing the database may need the assistance of suitable in-country tourism communication and/or marketing companies or organisations.

The market profile and contact information contained in **Annexure A** provide a good basis for such a database.

d) Streamline trade show participation

Trade shows have traditionally consumed a significant portion of GT Board's destination marketing budget, often with limited measurable returns. This initiative transforms The Gambia's approach to international trade events, shifting from widespread participation to strategic engagement that maximises impact while optimising expenditure.

By focusing resources on fewer, carefully selected events and adopting a unified, collaborative approach between public and private stakeholders, The Gambia can achieve a more commanding presence that stands out in a crowded exhibition environment. This coordinated strategy ensures consistent messaging, eliminates duplication of efforts, and leverages the combined strength of all tourism stakeholders.

- *Measurable ROI:* Each trade show yields quantifiable results, with clear tracking of meetings conducted, leads generated, and actual business converted, demonstrating positive return on investment.
- *Cohesive destination narrative:* Public and private sector representatives deliver consistent, complementary messaging about The Gambia through the #FindMySmile campaign theme and messaging, presenting a unified destination story rather than fragmented, sometimes contradictory pitches.
- *Private-sector return on investment:* Tourism businesses report greater value from participation, with increased quality leads and more effective use of their time and resources at each event.
- *Post-show conversion:* A higher percentage of trade show contacts translate into actual business relationships and bookings, with improved follow-up processes ensuring opportunities aren't lost.

The strategy requires implementing a disciplined approach to trade show selection, focusing on three core international exhibitions, namely:

- ITB Berlin.
- World Travel Market.
- Experience Africa.

This decision is based on detailed analysis of past performance, market alignment, and buyer quality at various shows.

For each selected show, the GT Board will establish clear objectives aligned with broader marketing goals, ensuring trade show participation supports our strategic priorities rather than operating as a standalone activity. These objectives will be communicated to all participants, creating shared purpose and measurable targets.

- Prior to each exhibition, GT Board will conduct comprehensive pre-show preparation to maximise effectiveness.
- A coordinated appointment system will optimise scheduling, allowing for strategic allocation of meetings based on buyer potential and partner specialisation.
- Implement a structured evaluation framework for assessing trade show performance, based on pre-defined KPIs including number of quality meetings held, leads generated, media coverage secured, and ultimately, business converted.
- Post-show debriefs will analyse results against objectives, identify successful strategies, and highlight areas for improvement.

e) Implement targeted trade roadshows and workshops in key source markets

Establish a calendar of focused roadshows and workshops in priority source markets. These events offer more intimate, market-specific engagement opportunities at a fraction of the cost of major trade shows.

Activities will include:

- Organising or joining 2-3 roadshows, such as the Africa Showcase events, annually in top source markets (UK, Netherlands, Germany) with events in key cities reaching 15-20 qualified operators per location.
- Partnering with 3-4 key Gambian tourism stakeholders to attend each roadshow, creating a cohesive team approach.
- Incorporating training elements that educate sales staff on The Gambia's unique selling propositions, particularly river experiences and cultural offerings.
- If organising as The Gambia, scheduling these events strategically to influence booking periods for both peak and shoulder seasons.

f) Establish a programme of direct sales visits to strategic operators

To further strengthen operator relationships, implement a structured programme of direct sales visits to key tour operators in priority markets.

The programme will include:

- Quarterly sales visits to the top 5-10 operators in each priority market.
- Tailored training sessions for reservation staff to increase knowledge and confidence in selling The Gambia.
- Development of operator-specific promotional materials that align with the #FindMySmile campaign, available in the trade toolkit.
- Regular business reviews with each strategic partner to evaluate performance and identify growth opportunities.
- Collection of market intelligence and consumer feedback to inform product development.

g) Create targeted shoulder season incentive programmes

To address seasonality challenges and encourage operators to extend charters beyond the current 5-month period, develop specially designed incentive programmes, by for example:

- Co-creating special promotional packages with key operators specifically for shoulder seasons (April-June and October-November).
- Offering tiered marketing support based on volume commitments during these periods.
- Developing exclusive experiences only available during shoulder seasons to create unique selling propositions.
- Implementing a "charter extension" incentive that provides additional marketing support and familiarisation trips for operators willing to extend their charter operations.

- Creating content highlighting the unique advantages of visiting during non-peak periods (better wildlife viewing, authentic cultural experiences, lower crowds).

h) Arrange high-impact, targeted trade familiarisation trips

Familiarisation trips remain one of the most effective tools for destination marketing, providing trade partners and media with firsthand experience of The Gambia's unique offerings. However, traditional approaches to fam trips often deliver suboptimal returns when they lack strategic focus or fail to target the right participants.

By shifting from quantity to quality and implementing a structured, results-oriented approach to fam trips, The Gambia can transform these investments into powerful catalysts for product diversification, market expansion, and authentic destination storytelling.

- *Measurable business development:* Each fam trip generates specific, trackable new business or expanded programming from participating operators, with clear ROI on hosting investment.
- *Product diversification:* Participants introduce new Gambia products following their visit, particularly incorporating river experiences, cultural activities, and wildlife offerings beyond traditional beach packages.
- *Expanded market presence:* The Gambia enters new niche markets or segments through participants who previously had limited or no Gambia programming.

For trade participants, the focus will be on decision-makers with direct influence on product development and marketing strategies, rather than junior staff with limited authority. Fam trip participation will be limited to maximum 12 tour pre-qualified operators or travel agents to ensure personalised attention and meaningful engagement.

Regarding fam trip arrangements, the following guidelines will be followed:

- A systematic qualification process for fam trip participants will be implemented, moving beyond opportunistic selection to a strategic approach that prioritises potential impact. This begins with comprehensive profiling of prospective participants, analysing current business volume, market influence, client demographic alignment, and growth potential.
- Rather than generic destination overviews, each fam trip will be designed in support of the #FindMySmile campaign, covering specific themes aligned with diversification priorities and the particular focus of participants. These themes could for example include "River Experiences & Wildlife," "Cultural Heritage & Community Tourism", and others.
- Itineraries will be meticulously crafted to showcase authentic, bookable experiences while allowing sufficient time for participants to absorb and appreciate each element.
- Each fam trip will operate on a partnership model, with costs and hosting responsibilities shared between the public and private sectors. Hotels, attractions, and experience providers will contribute in-kind services, while the GT Board coordinates logistics, provides guides, and ensures quality control throughout.
- The fam trip experience will extend well beyond the physical visit, beginning with pre-trip engagement that builds anticipation and provides context.
- Post-trip follow-up will be systematic and personalised, with the GT Board maintaining

contact with each participant.

- Familiarisation trips should further be co-hosted by private-sector partners to showcase their offerings directly to international trade representatives and assist with the sharing of the extensive costs that are usually associated with hosting fam trips.

i) Strengthen local private-sector participation in trade promotion

While GT Board will lead the coordination and initial development of the trade promotion campaign, private-sector stakeholders based in The Gambia should be allocated specific roles and responsibilities to leverage their networks and ensure its success.

The following roles and responsibilities may apply:

- Allocating complimentary or discounted accommodation and tourism services for strategic familiarisation trips and travel trade visits.
- Participating in local and international exhibitions, roadshows and workshops initiated by GT Board.
- Contributing financial resources to joint marketing initiatives, where possible and relevant.
- Developing itineraries that showcase options beyond traditional beach, including cultural immersion and eco-tourism experiences, for example.
- Initiating direct B2B engagements with international trade with whom they already have relationships to promote nature-based and cultural tourism.
- Producing high-quality promotional content highlighting the “beyond beach” experiences on offer in The Gambia.

These private-sector commitments should be formalised through annual partnership agreements with GT Board, establishing clear expectations and measurable contributions.

4.2.3 Strategy 2.3: Strengthen media engagement and PR in support of the #FindMySmile campaign

Strategic media engagement is essential for establishing destination awareness and building credibility among potential visitors of the #FindMySmile campaign theme. By developing deeper relationships with select journalists and publications rather than pursuing widespread but superficial coverage, The Gambia can ensure that media narratives authentically reflect its positioning and target the right audience segments. This approach will have the following results.

- *Narrative control:* Media coverage consistently reflects The Gambia's desired positioning and key messages related to #FindMySmile, particularly highlighting river experiences and cultural offerings alongside beach tourism.
- *Audience alignment:* Press coverage appears in publications and platforms that reach The Gambia's target segments, rather than generic travel media that may not connect with priority audiences.

- *Coverage diversity:* Media stories span various aspects of The Gambia's tourism offering, breaking away from formulaic "winter sun" narratives to showcase the destination's depth and diversity.
- *Market penetration:* The Gambia achieves consistent media presence in priority source markets, maintaining visibility throughout the year rather than solely during traditional booking periods.

The following actions will be executed.

4.2.3.1 Actions

a) Create a high-impact media kit

A comprehensive, visually striking media kit serves as the foundation for effective press relations and trade engagement. This initiative focuses on developing a premium resource that not only provides essential facts about The Gambia but also inspires compelling #FindMySmile storytelling through carefully curated content, evocative imagery, and ready-to-use assets. The results should include:

- *Increased usage:* Journalists and trade partners actively download and reference the media kit, with trackable use rates demonstrating its practical value.
- *Message consistency:* Media coverage reflects the key narratives, facts, and themes presented in the kit, indicating its effectiveness in shaping destination storytelling.
- *Content adoption:* Images, quotes, and fact points from the media kit appear regularly in published coverage, showing that the provided resources meet real media needs.
- *Story diversification:* Coverage inspired by the media kit spans The Gambia's full tourism offering, particularly highlighting priority areas like river experiences and cultural tourism.

The strategy requires the development of a media kit through a collaborative process that draws upon both tourism expertise and media professionals' perspective:

- Conduct interviews with select journalists who cover Africa and experiential and exploratory travel to understand what information and resources would most effectively support their work.
- Bring together representatives from different tourism sectors (hotels, tour operators, cultural attractions, river experiences) to identify key stories, facts, and differentiators that should be highlighted.
- Engage specialised content creators, including travel writers, photographers, and designers with experience in destination marketing to ensure professional quality and journalistic relevance.
- Develop core content applicable across all markets, with supplementary sections tailored to specific source markets' interests, media landscape, and cultural context.

The media kit will include strategically developed components designed to provide both inspiration and practical information:

- A compelling destination overview that establishes The Gambia's emotional positioning and #FindMySmile campaign around the "smile" concept and Africa's friendliest river, moving beyond facts to convey the feeling of the destination.

- Develop in-depth sections on key #FindMySmile themes:
 - River Experiences & Wildlife Encounters
 - Cultural Heritage & Living Traditions
 - Community-Based Tourism & Authentic Connections
 - Culinary Exploration & Local Flavours
 - Beyond the Beach: Adventure & Active Tourism
- Curate a collection of professional, rights-cleared images and videos that showcase The Gambia's diversity, organised by theme and featuring detailed captions and photographer credits for immediate use.
- Compile essential information journalists need:
 - Destination Fact Sheet with key statistics and practical details
 - Seasonal Calendar highlighting events, natural phenomena, and ideal visiting periods
 - Accommodation Overview spanning different categories and locations
 - Transportation Guide explaining how to travel to and within The Gambia
 - Spokesperson Directory with expert contacts for different tourism aspects
- Create turnkey assets that reduce journalists' production work:
 - Sample itineraries for different interests and trip durations
 - Pre-cleared quotes from tourism officials and local experts
 - Social media-ready image pack optimised for different platforms
 - Short, medium, and long destination descriptions for varied uses

Systems should be implemented to ensure the media kit reaches the right users and remains current:

- Make the kit available through multiple channels:
 - Prominent placement on The Gambia's tourism website
 - Direct distribution to the database of media contacts
 - Inclusion in press trip briefing materials
 - Distribution at trade shows and media events
 - Sharing the toolkit with private sector based in The Gambia
 - Digital sharing through PR networks and media platforms
- Implement systems to monitor media kit use:
 - Download tracking with optional registration
 - Content usage surveys with key media partners
 - Coverage monitoring to identify kit-inspired content
 - Feedback mechanism for continuous improvement

b) Establish a structured media relations programme built around a comprehensive annual PR calendar.

This calendar will align #FindMySmile story angles with seasonal relevance, editorial calendars of target publications, and The Gambia's strategic priorities.

Key elements include:

- Creating a progression of complementary stories throughout the year that collectively build The Gambia's brand narrative, ensuring consistent messaging while avoiding repetition.
- Identifying specific angles that align with both editorial opportunities and The Gambia's seasonal offerings, such as bird migration periods, cultural festivals, and green season river experiences.
- Developing a comprehensive set of core messages, supporting facts, and authentic stories that media contacts can draw upon, ensuring factual accuracy and messaging consistency while allowing for journalistic interpretation.

The initiative moves GT Board beyond transactional media interactions to develop meaningful relationships with select journalists and publications whose audiences and editorial focus align with The Gambia's target segments. Activities will include:

- Engaging professional market representation with specialised travel PR capabilities in key source markets, as proposed under Goal 3, to access their media relationships, local knowledge, and on-the-ground presence.
- Identifying 10 high-priority journalists and influencers per source market who reach our target audiences and demonstrate genuine interest in authentic African travel experiences.
- As with the travel trade, journalists will be pre-qualified to participate in hosted familiarisation trips to The Gambia, based on track record, guaranteed placement of stories and articles, quality of publications that will carry stories and undertaking to track publications and provide feedback to GT Board.
- Creating tailored approaches for each priority contact based on their interests, previous coverage, and professional needs, moving beyond generic press releases to customised pitches and exclusive angles.
- Maintaining consistent contact with priority media between major announcements or journalist trips, providing exclusive updates, personalised assistance, and genuine value that positions The Gambia as a helpful resource.
- Developing specialised itineraries around specific themes (River Wildlife Photography, Cultural Immersion, Sustainable Tourism Initiatives) that align with publication interests and editorial calendars.
- Pairing journalists with local experts, community members, and authentic characters who can share compelling personal narratives that bring The Gambia's story to life.
- Establishing clear processes for timely response to media inquiries, including designated spokespersons, fact-checking procedures, and escalation paths for sensitive topics.
- Implementing comprehensive tracking of The Gambia's media coverage across traditional and digital channels, enabling analysis of messaging effectiveness and rapid response to emerging narratives.
- Developing metrics that go beyond simple clip counting to assess the quality, reach, and impact of media coverage, including message penetration, audience alignment, and sentiment analysis.

The private sector and media based in The Gambia will actively participate in the structured media relations programme by assisting with the hosting of journalists and content creators at their properties or attractions. These may also contribute to the annual PR calendar by proposing events, activities or experiences that align with the #FindMySmile campaign theme.

4.2.4 Strategy 2.4: Launch an intensive #FindMySmile digital marketing drive

To evolve and diversify tourism demand in favour of culture and nature-focused tourism, targeting younger travellers, digital marketing is essential as it offers precision, reach, and measurable impact. Traditional tourism promotion is no longer enough. Today's travellers discover destinations online and digital marketing would enable The Gambia to target adventure-seekers and culture enthusiasts through SEO, social media, and programmatic campaigns, ensuring maximum engagement.

Repositioning of the destination through the #FindMySmile consumer campaign requires compelling storytelling. Through high-quality content—blogs, videos, and social media—The Gambia can highlight the country's history, wildlife, and cultural experiences. Platforms like Instagram, YouTube, and TikTok allow immersive visual storytelling, inspiring new travellers. Millennials and Gen Z rely on social proof before booking trips and therefore influencer partnerships and user-generated content provide authentic endorsements. By collaborating with travel content creators, The Gambia can showcase new attractions, local experiences and festivals, by strengthening its credibility and communicating the rejuvenating and restorative effect of The Gambia on travellers.

Private-sector stakeholders may be called on to contribute to the rebranding and enhancement of the destination website and digital collateral by providing high-quality content, such as professional images and raw video footage, for example.

Unlike traditional marketing, digital provides real-time insights. Analytics tools track engagement, revealing traveller preferences and campaign effectiveness. This data can be used to refine messaging and optimise marketing spend for maximum impact.

A strong digital presence increases awareness and conversions. By optimising the tourism website with SEO, seamless booking integrations, and retargeting advertisements, The Gambia can boost enquiries and bookings. Seasonal offers, email marketing, and personalised recommendations further enhance visitor engagement.

The actions outlined below will be executed over the 5-year strategy period. A more detailed, 3-staged plan for implementing the digital marketing actions outlined below, is attached as **Annexure B**.

In summary, the following digital marketing actions will be undertaken.

4.2.4.1 Actions

a) Rebrand and improve the destination website and CRM

As a foundation for digital rebranding and implementation of the #FindMySmile campaign, the destination website will be upgraded with interactive features, stakeholder data will be digitised, and CRM systems implemented to track visitor engagement. These improvements

will make it easier for travellers to discover and book experiences. Specific activities will include:

- Upgrading the website with engaging visuals, interactive content, and optimised landing pages.
- Developing a real-time stakeholder database for hotels, operators, restaurants etc.
- Implementing CRM and analytics tools to track visitor engagement and optimise targeting.
- Adding a dedicated #FindMySmile Gambia menu item on the official website, which should profile nature and culture experiences offered by local tour and activity operators e.g. community tours, water-based (kayaking/boating) activities, cultural entertainment opportunities, birding and safari/wildlife experiences, food and cooking activities, and other unique excursions.
- Featuring a captivating slideshow before the main redesigned Gambia Tourism website opens, to create an immediate emotional connection with visitors. This visual introduction will showcase smiling Gambians and travellers immersed in cultural, historical, and adventure experiences across the country. From vibrant local festivals and bustling markets to serene river cruises and thrilling wildlife encounters, these images will embody the essence of The Gambia's new #FindMySmile campaign. This approach sets the tone for the destination's repositioning, inviting travellers to discover not just a place, but a feeling—one of joy, warmth, and unforgettable experiences.

b) Produce and distribute relevant and on-brand digital marketing content

Compelling, targeted content will need to be created to highlight The Gambia's diverse tourism offerings in support of the #FindMySmile campaign. Blog articles, videos, and travel guides will cater to different traveller segments, driving awareness and engagement. This content will be strategically distributed across social media, the website, and partner platforms. Activities will include:

- Creating #FindMySmile, platform-specific content, including:
 - *Visual storytelling series:* A series of short, professionally shot videos and photo essays that capture the magic of everyday moments in The Gambia.
Social media reels: For platforms such as Instagram, Facebook, and TikTok, visually compelling graphics and bite-sized reels showcasing daily life infused with the warmth of Gambian hospitality.
 - *A Smile Stories series:* Capturing authentic transformation narratives of visitors from "smile deficit" regions experiencing The Gambia. Short clips following the journey of carefully selected individuals—from their stressed, disconnected daily lives through their Gambian experiences to their visible transformation.
- Developing engaging multi-platform blogs, long- and short form videos, and guides showcasing The Gambia's culture and adventure tourism and .
- Personalising content for adventure travellers, diaspora visitors, and event organisers.
- Creating lead-generation assets like downloadable travel guides.
- Distributing content across owned channels, social media, and partner websites.

The private sector in The Gambia may play a key role in producing relevant and on-brand digital marketing content, partnering with GT Board to create user-generated content campaigns and collaborating on video storytelling highlighting brand-aligned experiences such as river safaris, cultural tourism and eco-tourism activities.

c) Engage influencers to bolster destination awareness and conversion

Influencer marketing will help build credibility and increase destination awareness. Travel influencers, cultural ambassadors, and diaspora personalities will help expand the reach of #FindMySmile and showcase The Gambia's unique experiences, inspiring their followers to visit.

A strategic earned media #FindMySmile campaign creating authentic advocacy for The Gambia through carefully selected voices from target markets and market segments. This programme will leverage influencers with highly engaged audiences to document their genuine "smile restoration journeys".

The following specific activities are foreseen.

- Partnering with travel influencers, bloggers, and diaspora ambassadors for authentic storytelling.
- Collaborative content creation by pairing influencers with local Gambian "Smile Ambassadors" for genuine cultural exchange moments,
- Featuring influencer-led travel experiences to highlight adventure and cultural activities and the restorative effect of their travels.
- Private sector stakeholders offering complimentary or heavily discounted accommodation and tourism services to showcase The Gambia's tourism offerings.
- Measuring impact through engagement rates, website traffic, and conversions.

d) Amplify #FindMySmile through dynamic social media marketing

Social media will play a critical role in raising destination awareness, fostering engagement, generating leads and driving website visitation from both international and domestic markets. The following activities will be executed to amplify #FindMySmile through social media:

- Implementing a robust social media content plan and calendar: Develop a structured content calendar aligned with the #FindMySmile campaign, targeting key market segments across platforms including Facebook, Instagram, X (Twitter), TikTok and LinkedIn. Content will include engaging photography, short-form videos, reels, live streams, polls, and destination storytelling to drive high engagement and community interaction.
- Producing high-quality post-production content: Prioritise professional post-production for all social media content including videos, reels and imagery, ensuring brand consistency and visual appeal that resonates with core and emerging audiences.
- Boosting key posts and leverage paid social advertising: Allocate budget for the strategic boosting of high-performing organic posts and the implementation of paid social media

advertising campaigns to increase reach, drive website traffic, and generate leads and enquiries.

- Driving traffic and lead generation: Integrate strong calls-to-action and link strategies within posts and ads to direct users to the destination website, campaign landing pages, and lead capture forms. Utilise remarketing techniques to nurture and convert audiences.
- Grow follower base and community engagement: Implement targeted follower growth strategies including contests, partnerships with content creators, audience engagement initiatives, and strategic collaborations with diaspora and special interest communities to organically increase followers and boost engagement rates.

d) Leverage marketing partnerships and user-generated content

Strategic partnerships and User Generated Content (UGC) will expand #FindMySmile reach and authenticity. Travel agencies, tourism platforms, local media and local businesses will need to collaborate on marketing initiatives, while traveller-generated content will provide social proof and organic promotion.

- Partnering with online travel agencies (OTAs) and other travel platforms for co-branded promotions and increased visibility.
- Encouraging past travellers to share experiences using dedicated hashtags related to #FindMySmile.
- Leveraging the existing B2B and B2C networks of local-based private sector stakeholders to encourage and promote UGC across their owned and earned digital platforms.
- Incentivising UGC through contests and recognition on GT Board's official platforms.
- Repurposing high-quality UGC in marketing campaigns.

e) Conduct email marketing

Customer relationship management and loyalty is critical for retaining traveller interest and encourage return visitation and positive word-of-mouth messages. This includes building up a niche database of potential travellers using online advertising and deploying the segmented database for email marketing that would help drive conversions. Specific activities will include:

- Creating targeted email campaigns for adventure seekers, diaspora travellers, and event planners.
- Automating drip campaigns to nurture leads with personalised recommendations.
- Sending event updates, travel promotions, and exclusive booking incentives.
- Leveraging the databases of local-based tourism stakeholders to amplify messaging.
- Tracking email engagement to refine content and targeting.

f) Conduct targeted paid advertising

Paid online campaigns will bolster efforts to reach relevant high-intent travellers and motivate them to generate enquiries and bookings. Google Ads, social media advertising,

and programmatic retargeting will ensure The Gambia is visible in key search results during the traveller’s planning and booking process. The following key activities are included:

- Running Google and Bing Ads targeting “experience/nature/culture tourism in The Gambia.”
- Using programmatic display and retargeting campaigns to capture interested travellers.
- A/B testing of advertising creatives to optimise conversion rates.
- Expanding high-performing ad formats and audience targeting strategies.

g) Constantly measure and monitor digital marketing performance

A data-driven approach will help track campaign success, support strategy refinement and enhance traveller engagement. Performance insights will guide continuous improvements to maximise effectiveness. The following activities will be implemented:

- Tracking KPIs (website traffic, conversion rates, engagement) using analytics tools.
- Conducting monthly and quarterly performance reviews to optimise campaigns.
- Using traveller feedback from surveys and reviews to improve content and experiences.
- Benchmarking against competitor destinations.

4.2.5 Strategy 2.5: Promote The Gambia as a preferred Meetings, Incentives, Conventions, Exhibitions and Events destination

The large and modern conference facilities of the Sir Dawda Kairaba Jawara International Conference Centre in Banjul and the many excursion options available present The Gambia with a major opportunity to enter and grow the international MICE market. The MICE value chain differs substantially from that of the leisure tourism industry and involves conference centres, conference hotels, professional conference organisers, professional incentive operators, trade and subject associations. It requires a separate and dedicated marketing thrust.

In addition to business tourism, the development of sport and cultural events can play an important role in attracting visitors outside of the main leisure tourism season and can also serve as catalysts for destination publicity.

See: <https://www.ibtmworld.com/>

In just a decade, Rwanda’s MICE industry has surged to impressive heights. Since the inauguration of the Rwanda Convention Bureau (RCB) in 2015, the country has hosted over 800 international events, a testament to the government’s unwavering commitment to making meetings and events a cornerstone of economic growth. This dedication has driven Rwanda to retain the second-place ranking in Africa, for association conferences and meetings in the ICCA 2023 rankings.

A decade ago, Rwanda’s MICE infrastructure consisted of only a handful of key hotels but now, the country boasts state-of-the-art facilities, including the Kigali Convention Centre, Kigali Convention & Exhibition Village, Intare Conference Arena, BK Arena, and the newly renovated Amahoro Stadium, which seats 45,000 people.

Fueled by strategic investments from both the government and private sector, in the past decade, Rwanda has successfully hosted major global events, such as the 73rd FIFA Congress in 2023 with over 1500 delegates and the Women Deliver Conference in 2023, attracting over 5,000 participants. The Basketball Africa League (BAL), running annually from 2021 to 2024, brought in more than 1,000 delegates each year. Other standout events include the International Conference on AIDS and STIs in Africa (ICASA) 2019 that brought in 4000+ delegates, Commonwealth Heads of Government Meeting (CHOGM) 2022, International Telecommunication Union (ITU) 2022, and the World Economic Forum in 2016 to name a few.

The following actions will be implemented to advance MICE tourism.

4.2.5.1 Actions

a) Establish a dedicated national MICE desk in GT Board

A dedicated MICE unit will be set up and staffed by one or two staff who are trained up and mandated to bid for international conferences, exhibitions and events, in close collaboration with the international conference centre and other conference venues. International MICE marketing experts could be recruited to assist and train up the unit and to assist them in entering this market segment.

The MICE unit could in time evolve into a full-blown Convention Bureau and should be responsible for:

- Developing a MICE marketing strategy to market and sell meetings, conferences and incentive and to package incentive and pre/post tour itineraries, in close collaboration with the Sir Dawda Kairaba Jawara International Conference Centre and other conference facility owners.
- Working in close collaboration with the Sir Dawda Kairaba Jawara International Conference Centre and other conference facility owners to lead the execution of the MICE marketing strategy.
- Conducting an audit and establishing a database of MICE meeting and supportive facilities in the Gambia.
- Creating awareness of and promoting The Gambia as a prime MICE destination in West Africa.
- Establishing working relationships with sport, cultural, academic and other associations to support them in bidding for and marketing conferences in their areas of interest in The Gambia.
- Bidding for international conferences and events to be staged in The Gambia.
- Providing in-kind support to conference and event organisers in organising such occasions, e.g. marketing, permitting, preparing locations and other areas of government support.
- Collaborating with hotels, venue operators and event management companies in The Gambia to create comprehensive bids.

b) Implement a phased MICE promotion programme

Promoting The Gambia as a premier international MICE destination will be implemented in two Stages through the strategy period, namely:

Phase 1: Years 1 and 2, focused on creating awareness and establishing the foundations of MICE tourism, including the following activities:

- Crafting a MICE tourism brand for The Gambia, as a sub-brand of the destination brand.
- Conducting a feasibility study and destination audit of suitable venues, accommodation and services inventory, and other supportive services.

- Developing a MICE Toolkit for local MICE suppliers to ensure standardised MICE facility specifications, develop delegate experience packages and provide service guarantees.
- Developing a suite of initial MICE marketing collateral, which could include:
 - A separate MICE section on The Gambia tourism website.
 - A digital MICE brochure and a directory of services with suitable contents regarding international-standard conferencing venues, accommodation facilities, professional conference organisers and supportive amenities to host international conferences of all sizes
 - A media pack and portfolio that can be easily packaged and distributed to convey details regarding The Gambia's MICE offering
 - A bid book and other supporting collateral
- Collaborating and partnering with local and international MICE providers and market partners, including:
 - Sir Dawda Kairaba Jawara International Conference Centre and other conference and events venues
 - MICE-focused accommodation providers
 - Suitable operators and organisers to handle meetings, conferences and incentive trips
 - Academic professionals and departments, specialist development organisations, research facilities, sport and cultural bodies, medical faculties and other organisations are members of, or are affiliated to international associations that represent their interests and that stage annual or bi-annual conferences or special events for their members. The proposed GT Board MICE unit can collaborate with local associations to bid for such events
- Arranging site inspections and familiarisation trips to potential meeting and incentive buyers.
- Initiating MICE market delegate research to better understand the sector and to take advantage of the opportunities presented
- Attending trade shows along with the Sir Dawda Kairaba Jawara International Conference Centre, e.g.:
 - IBTM World, Barcelona – annually in November
 - IMEX , Frankfurt – annually in May

Stage 2: Years 3 to 5, focused on professionalising the MICE sector, including the following activities in addition to those that will continue from Stage 1:

- Developing and implementing a bidding strategy for specific regional and international sport, cultural and academic conferences.
- Joining and leveraging the power of appropriate international industry associations (e.g. ICCA and SITE).
- Establishing a coordinated local forum for the MICE industry.

- Mentoring and training of MICE staff to improve professionalism.
- Developing Convention Bureau management tools (e.g. for conducting delegate research and measuring the positive return-on-investment of hosting a meeting).
- Initiating and promoting product and service quality improvement in the MICE sector.

c) Develop and implement Gambia events strategy

Staging local and international sport and cultural events could be important catalysts a) as anchor items for the *#FindMySmile* campaign, b) for generating tourism, especially during the “shoulder” and “low” tourism seasons and c) serving as flagship brand icons, if such events are or could becoming famous at international level. The objective of the events strategy will be to attract international visitors from the West Africa sub-region and abroad, especially during the winter season. The following activities will be executed:

- Developing a *#FindMySmile* events policy and strategy, including:
 - A hierarchy of events e.g. international/regional bidding events (e.g. international or regional level sport or cultural events that could be attracted to The Gambia, flagship national events staged in The Gambia, community events staged at local level
 - The role of GT Board and type of support that GT Board could provide at each level
 - Criteria, process and costs of applying for and securing GT Board support
 - Permits and permissions required for staging events
 - A set of safety and crisis management guidelines and checklist in respect of all events held in the country
- Developing a *#FindMySmile* events calendar with descriptions and booking information for all GT Board accredited events, to be carried and continuously updated on the website and can be exported to other platforms.
- In-kind and possible financial support for a few *#FindMySmile* flagship events, which could increase demand during the traditional shoulder and low seasons and could strengthen The Gambia’s differentiated positioning. Events that could be considered for flagship event status could include:
 - Resurrecting the International Roots Homecoming Festival, which was last held in 2016, and that is mainly aimed at attracting the global Gambia Diaspora to the country
 - Staging an International Birding Festival in association with international birding associations, as a multi-day event consisting of a bird watching challenge, exhibition, conference, lectures and site visits
 - A regional and international River Extreme Challenge, which could include a combination of land and water-based activities e.g. cycling, kayaking and possibly swimming in and around the River Gambia
 - An international String Instrument Festival, led by the Kora but including other instrument performances and celebrations

4.2.6 Strategy 2.6: Launch the #SmileGambia domestic campaign to enhance domestic tourism awareness and travel

As indicated in the introductory section the #SmileGambia domestic campaign will be launched to raise awareness of tourism and stimulate travel among Gambians and foreign residents.

The following actions will be undertaken to activate #SmileGambia:

4.2.6.1 Actions

a) Execute the #SmileGambia domestic travel promotion campaign

The objectives of the domestic travel promotion drive are to:

- *Stimulate domestic tourism expenditure:* Provide Gambians with affordable travel opportunities in their own backyard to increase domestic tourism visits and spending in shoulder seasons, creating a more balanced year-round tourism economy.
- *Enhance tourism resilience:* Develop a robust domestic tourism market that can help sustain the industry during international travel disruptions and complement international tourism during peak seasons.
- *Foster national pride and awareness:* Cultivate deeper appreciation among Gambians for their country's tourism assets, transforming citizens into knowledgeable advocates for The Gambia's tourism offering.
- *Improve regional distribution of tourism benefits:* Encourage domestic travel beyond traditional coastal areas to spread economic benefits throughout all regions of The Gambia.
- *Create a culture of tourism participation:* Transform Gambians from passive observers of tourism to active participants who regularly engage in domestic travel experiences.
- *Develop tourism ambassadorship:* Establish a network of local tourism champions who authentically embody the "Gambian smile" and promote domestic tourism through personal advocacy.

The following activities and aspects will be considered in developing #SmileGambia travel promotion campaign.

- Developing a #SmileGambia campaign plan with specific activities, budget allocations, roles and timeframes. Campaign activities should be focused on the 'shoulder' seasonal months of April, May and/or September and launched at least six months in advance of the actual travel periods.
- Developing a campaign identity that speaks to local Gambian culture, language and enjoyment preferences, and that will complement the national brand identity.
- Outsourcing operational aspects of the #SmileGambia campaign, with GT Board playing the role of campaign leader, coordinator and manager.
- Collaborating with the local tourism trade in coming up with special price and value promotions. Potential partners include local accommodation operators, travel agencies, transport providers and other service providers, with special offers being promoted in the local media, on social media, and on the GT Board website.

- Partnering with the media, including Gambia Radio and Television Services (GRTS) and other domestic media to implement a PR, editorial and advertising drive to promote #SmileGambia, the travel opportunities offered and to raise awareness of the importance of tourism and the role that locals can play in advancing the sector.
- Leveraging owned digital platforms, social media influencers, and UGC to spread the #SmileGambia message and travel offers throughout society.
- Encouraging and supporting local towns and communities to partner with GT Board in presenting local events, organised activities and marketing actions in support of the national campaign.

b) Develop and execute the #SmileGambia schools tourism competition

The aim of the annual schools competition will centre specifically on the importance of and potential for sustainable and regenerative tourism in The Gambia. The objectives will be to:

- Raise awareness of the importance of sustainable tourism and the responsibility of citizens to protect and enhance their natural and cultural resources to generate tourism revenue and jobs.
- Inculcate awareness of the importance of tourism for The Gambia, the responsibility on Gambians to deliver on the brand promise of *“My Smile Welcomes You”* and the entrepreneurial and business prospects of tourism as a career.

The following arrangements could be considered:

- The competition should ideally be aimed at junior secondary level grades (Grades 7 to 9), when learners have the capacity to participate, while their schedules are under less pressure than in higher grades. A specific grade could be targeted each year.
- GT Board should partner with the Ministry of Basic and Secondary Education to stage the competition.
- School principals should be brought on board.
- Participation could be in groups, i.e. learners should join up in teams to enter the competition.
- Prizes (partly or full sponsored by the tourism and related industries) will be allocated to the winning group as well as to the schools that they are from.
- Annual themes could be promoted, e.g. maintaining and enhancing unique cultural traditions and presenting these to tourist, Gambian birdlife and birding tourism; the River Gambia as the tourism lifeblood of The Gambia; protecting our coastline for tourism, etc.
- The competition format could be adapted annually to fit the capabilities of learners in various grades and could include e.g. performing and recording a short dance or drama to express their response; debating a particular problem statement; expressing their view through art and/or handicraft, conducting a conservation project in their community that could benefit tourism, etc.

c) Execute the Smile Ambassadors Community programme

The Smile Ambassadors Community Programme will identify and celebrate local tourism champions from diverse communities throughout The Gambia, creating a network of

passionate local advocates who will authentically communicate the value of domestic tourism while serving as regional tourism representatives.

This grassroots initiative recognises that the most powerful promotion comes from genuine local enthusiasm and knowledge. By investing in community-based tourism advocacy, ordinary Gambians will be transformed into extraordinary ambassadors who embody the warmth and hospitality for which our nation is renowned. The initiative will strive to:

- Enhance destination knowledge, with Ambassadors demonstrating deep understanding of The Gambia's tourism assets, becoming credible resources for both visitors and fellow Gambians seeking domestic travel experiences.
- Provide opportunities for local representatives to provide authentic promotion that resonates more powerfully than traditional marketing, thus generating measurable increases in domestic visitation to their regions.
- Expand local representation with each local area of The Gambia being encouraged to develop its own distinctive message and “voice” within the national tourism narrative, ensuring comprehensive destination coverage beyond traditional tourist areas.
- Improve local tourism experiences, with ambassadors’ feedback helping to refine and enhance visitor experiences, as they provide valuable insights from both local and visitor perspectives.

This initiative requires identifying individuals with natural enthusiasm for their communities and a willingness to share their knowledge with others. The selection process will prioritise diversity in age, background, and regional representation to ensure comprehensive coverage.

Programme activities could include the following:

- Training ambassadors in tourism fundamentals, storytelling techniques, digital content creation, and regional tourism assets.
- Ambassadors participating in familiarisation trips to tourism sites throughout The Gambia, where possible, to expand their knowledge beyond their immediate regions and build connections with other ambassadors.
- Providing ongoing support through a dedicated digital platform where ambassadors can access resources, share experiences, and coordinate activities.
- Holding regular meetings to bring ambassadors together for knowledge sharing, collaboration opportunities, and celebration of success stories, ensuring the network remains vibrant and engaged.

d) Launch The Gambia Tourism Week and Awards Programme

To encourage tourism participation and awareness, the week in which the World Tourism Day of 27 September falls will be declared Gambia Tourism week. During this week, various activities will be undertaken to raise awareness of the importance of tourism in The Gambia, and related aspects such as waste management and environmental sustainability. Activities during this week will include:

- World Tourism Day celebrations, to be held at specific locations on a rotational basis, and linking up with UN Tourism’s global theme each year.

- Free or heavily discounted access to key public attractions and with the private sector providing discounted prices for activities such as accommodation, boat excursions, eating out and other activities
- Staging of a gala event for National Tourism Awards, where individuals and companies will be awarded for their outstanding achievements in service quality, guiding, accommodation innovation and service, brand ambassadorship, tour guiding, sustainable and regenerative tourism management, community-based tourism, technology innovation and other aspects.

4.2.7 Strategy 2.7: Launch a coordinated tourism crisis management initiative

Tourism is a cornerstone of The Gambia’s economy and cultural identity, yet it remains highly vulnerable to crises, whether environmental, health-related, geopolitical, or reputational. A coordinated tourism crisis management initiative entails a structured, rapid-response framework that enables The Gambia’s tourism sector to anticipate, mitigate, respond to, and recover from crises effectively.

By adopting a proactive, collaborative, and technology-driven approach, this initiative aims to safeguard the resilience of The Gambia’s tourism industry while maintaining the country’s reputation as a welcoming, safe, and reliable destination.

The crisis management initiative will seek to:

- Strengthen crisis preparedness across the tourism system, including among relevant public and private sector stakeholders.
- Enhance multi-stakeholder coordination and crisis leadership by improving communication channels and formalising roles and responsibilities between stakeholders in tourism, security and emergency response agencies.
- Protect The Gambia’s tourism reputation and visitor confidence by developing a comprehensive crisis communication strategy to ensure and monitor transparent, timely, and effective messaging during crises.
- Minimise economic disruptions and accelerate recovery during severe crises by introducing business continuity planning tools and providing targeted support for SMEs and tourism-dependent communities.

The following actions will be executed over the strategy period.

4.2.7.1 Actions

a) Establish a national tourism crisis management task force

A multi-stakeholder task force will be established to oversee crisis preparedness, response coordination, and recovery efforts within the tourism sector. The task force will be led by GT Board and will include the police, health and immigration services as well as private-sector tourism association members. The Task force will meet only twice per annum during non-crisis periods, while it will meet as often as necessary during crisis. Its activities will include:

- Serving as the central authority for tourism crisis response, bringing together government, private sector operators, and emergency agencies.

- Developing crisis management protocols and implementation procedures specific to tourism-related disruptions, including health crises, security threats, climate disasters, and reputational risks.
- Facilitating simulations and scenario-based crisis response exercises to test and refine emergency procedures.
- Ensuring a clear chain of command, decision-making and communication framework for crises affecting tourism.
- Linking up with national disaster management systems to track emerging risks for tourism.
- Establishing a real-time crisis notification mechanism to provide accurate, up-to-date information to tourism operators, travellers, and the public in times of crises.
- Providing training to tourism staff and frontline workers on emergency protocols, guest safety measures, and evacuation procedures.

b) **Develop and implement a suitable crisis communication and reputation management strategy**

Effective communication is critical in managing crises and safeguarding The Gambia's tourism brand and the following activities will be executed to manage communication and protect The Gambia's tourism reputation from the effects of crises. The strategy will include:

- Developing a Crisis Communication Playbook for tourism operators, government agencies, and media partners, outlining clear messaging frameworks for different crisis scenarios.
- Establishing dedicated crisis communications roles and capacity within The Gambia Tourism Board (GT BOARD) to coordinate responses, issue timely updates, and combat misinformation.
- Implementing a real-time media monitoring and response system to track global and local coverage, ensuring swift intervention against misleading narratives.
- Launching visitor reassurance campaigns during and post-crisis, providing travellers with factual updates and recovery timelines to restore confidence.

c) **Establish a tourism business continuity and recovery support programme during severe crises**

Specific measures will be launched by the Government to ensure that tourism businesses can survive and recover from severe crises, that have an effect on their economic survival. These may include:

- Executing a crisis-ready destination training programme to equip hospitality workers, tour operators, transport providers, and frontline staff with crisis management skills.
- Providing business continuity planning resources to help tourism enterprises prepare for potential disruptions.
- Instituting a financial assistance framework, including potential relief grants, insurance guidance, and access to recovery loans for SMEs in tourism.

- Offering rapid response advisory support to tourism businesses during crises, helping them navigate financial, operational, and reputational challenges.
- Establishing a post-crisis rebranding and marketing fund to assist affected businesses in repositioning themselves after a disruption.
- Launching post-crisis recovery marketing and visitor confidence campaigns.

d) Set up a digital tourism crisis preparedness hub

A dedicated section will be set aside on the proposed trade portal of the official tourism website to provide tourism businesses and crisis response teams with critical information and support during crises. The hub will:

- Offer real-time crisis updates.
- Provide businesses with crisis management toolkits, including risk assessment templates, communication guides, and operational checklists.
- Host e-learning modules on crisis preparedness, allowing tourism businesses to continuously upskill.
- Feature an emergency response resource centre for tourism operators, with best-practice case studies and industry support materials.

4.3 Goal 3: Delivering on the brand promise. Ensure effective and efficient destination marketing execution capacity, collaboration and monitoring

Implementing the various actions contained in this strategy, delivering on The Gambia’s tourism brand promise and diversifying markets and products will require an “all hands on deck” approach and deploying adequate organisational capacity and skills to affect the change necessary. The following section sets out strategies and actions for strengthening organisational capacity and coordination.

4.3.1 Strategy 3.1: Strengthen the marketing, product development and investment capacity of GT Board

As indicated in the Situation Analysis report, the Marketing Division of the GT Board is inadequately structured and staffed. Effective implementation of the proposals contained in this marketing strategy requires institutional re-alignment and strengthened capacity in areas such as e-marketing, trade relations and partnerships, MICE tourism, domestic tourism and other marketing aspects.

GT Board funding should allow for a longer-term marketing approach to unlock new markets and segments. As such, measures should be introduced to promote marketing investment in medium- and longer-term growth prospects and to hedge the GT Board against unforeseen revenue fluctuations.

In addition, the Product Development, Investment & Culture Department requires strengthening to better align product quality and diversity with the new directions set out in this strategy and to

build its investment capacity. The emphasis in product development should be on research and analysis to support and facilitate the development of products by the private sector and identifying public sector investments that will attract private investment.

The investment function will focus on facilitating investment in well-conceived, demand driven product initiatives. This will require establishing functional responsibility and building skills to develop new market-ready products and convert them into investment-ready projects that meet market expectations while also building effective coordination mechanisms to ensure investment promotion efforts are well-aligned across agencies.

4.3.1.1 Actions

a) **Restructure the marketing department of the GT Board, within the context of the overall GT Board structure.**

The current marketing department does not have a focused post structure that directs positions in respect of specialised and measurable performance areas, as presented in Figure 18 below. As can be seen the department has a limited staff complement and a weak structure. Strengthening of the staff capacity is required.

While a detailed organisational work-study falls outside of the remit of this document, the following outline proposals may be considered in effectively structuring the organisation. More detailed work is required in assessing the level of effort, job descriptions and qualifications required for each job. In this respect MoTAC will appoint organisational development specialists, supported by a tourism technical advisor, to conduct and implement an overall review of GT Board's structure, with a view to align the entire structure with the marketing and investment promotion strategy contained in this document.

The GT Board marketing department has proposed a reorganisation, which was under internal review at the time of preparing this marketing strategy. Proposal include a Director of Marketing, a Senior Manager Marketing, 4 market-based Directors of Marketing, and 4 divisions, each with its own Manager and staff namely Activities/Domestic Tourism, Market Research and Development, E-marketing and Digitalisation and Marketing Communications. This proposal thus includes no less than 10 management level positions and is very top-heavy and costly.

The effective implementation of the market diversification strategy requires strengthening of key components of the marketing department, including dedicated capacity to drive market diversification, strategy development and performance management, brand management, stakeholder and crisis communications, industry coordination, travel trade marketing and partnerships; MICE marketing and e-marketing.

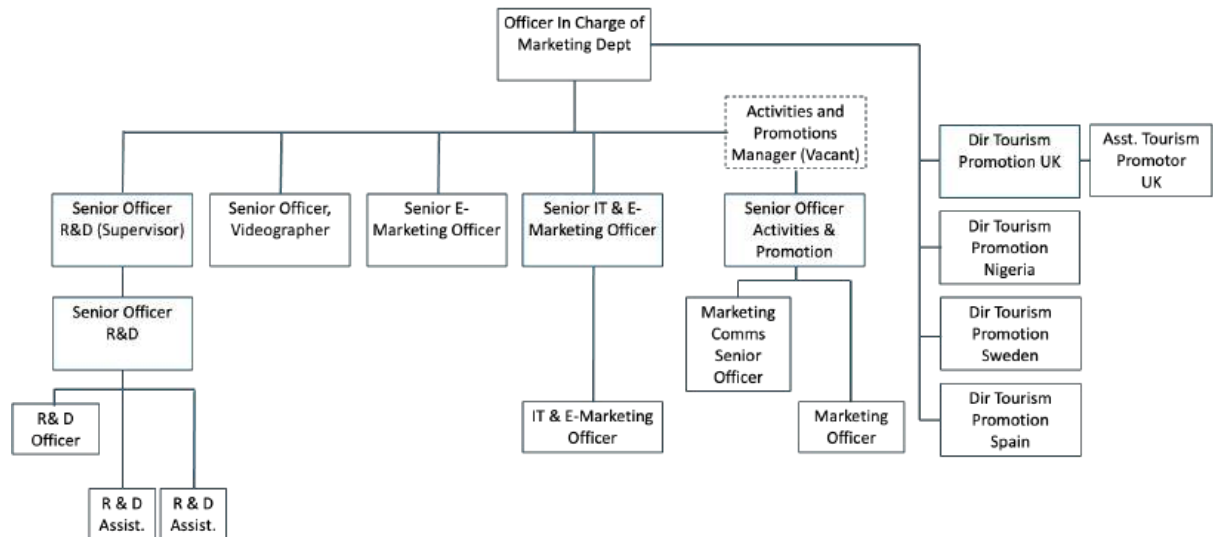


Figure 18 Current structure of the Marketing Department of GT Board

A proposed reorganised structure of the marketing department may entail the changes presented in Figure 19 below. While this structure could be amended *based on a more detailed organisational study*, it includes the following key shifts:

- Supporting the Head of Department with 3 Managers, to allow the HOD to focus on marketing strategy development, coordination with other departments in GT Board and MDAs, brand and image management, performance management and other strategic functions. These are:
 - A Manager who will be responsible for Marketing Services, which support the execution of promotional programmes, including PR, Communication, Crisis Management, Guest Services, Research and Statistics and Technology Management to ensure the effective use of internet services, Artificial Intelligence and capacity building of staff in this respect.
 - A Manager who will be responsible for Market Activation and Diversification, tasked to implement the #FindMySmile Campaign and drive the diversification of markets and new media, including MICE Marketing, E-marketing, New Markets and Segments expansion and Domestic Marketing and Awareness creation.
 - A Manager who will be responsible for directing and coordinating the plans and efforts of outsourced Market based Representatives in existing markets, i.e. Nigeria and Ghana (with a key focus on MICE marketing), the USA (with a key focus on the Roots market), UK and Scandinavia, and Germany and Benelux.
- As indicated above, replacing the four international office managers with contracted Market Based Representative companies with detailed, performance-based contracts and appointed on a transparent tender basis, overseen by a dedicated GT Board Manager (see Action b) below).
- Establishing a MICE marketing desk consisting of 2 officers, that can be expanded as activities and demand increase.

- Strengthening the E-marketing division as a key driver of market diversification and activating the #FindMySmile campaign, which can be expanded as E-marketing gains traction.
- Establishing a function specifically for expanding demand in new source markets and segments as highlighted in the action plan
- Strengthening the Market Research & Statistics division, with an additional focus on AI application.
- Providing for a dedicated Communication and Crisis Management role, given the need for proactive image management and an expected increase in health, climatic and other events that may affect The Gambia’s destination attractiveness.
- In restructuring and expanding, GT Board will establish standards for the promotion of gender equity through employment practices with emphasis on the removal of discrimination in relation to hiring, employment conditions, remuneration, professional development and promotion.
- In addition, a Destination Marketing, Promotions & Product Development Workgroup, as proposed in the NTPS, will be formed to strengthen coordination among key GT Board departments and other MDA’s engaged in destination marketing and investment promotion (See Strategy 3.2 b) below).

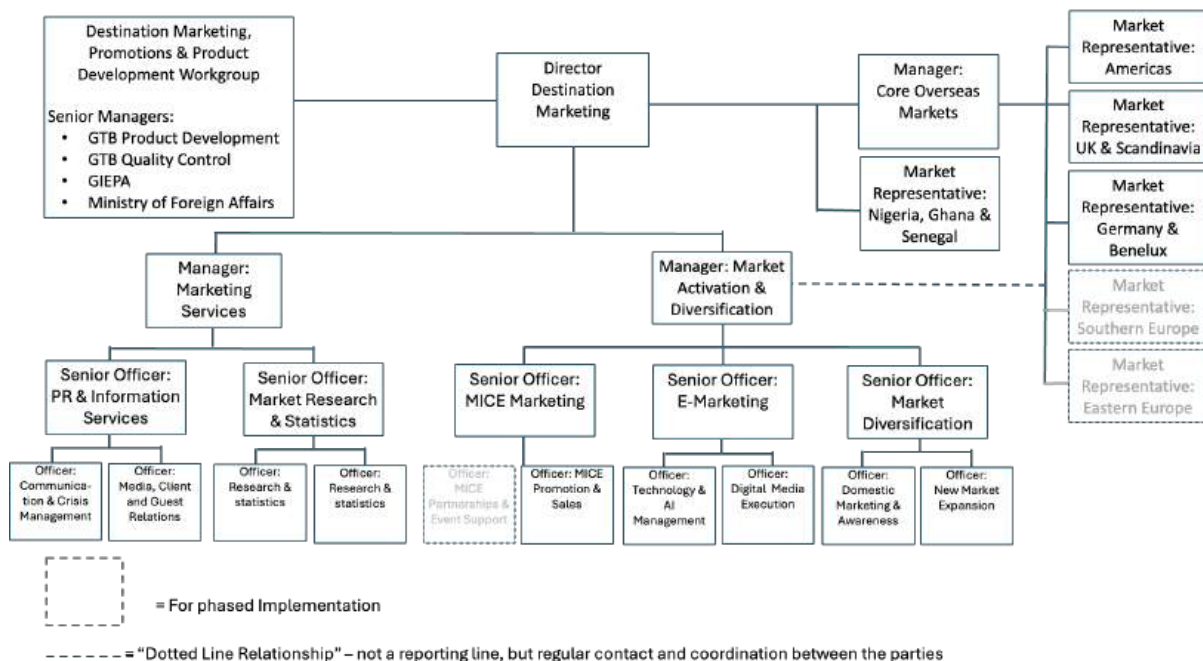


Figure 19 Proposed restructuring of the Marketing Department of GT Board

b) Recruit market-based representation agencies in priority source markets

As indicated in the above restructuring proposals the GT Board will recruit Market-Based Representation (MBR) Agencies in select priority source markets to enhance The Gambia’s presence and strengthen its trade and media engagement efforts in key international markets.

While GT Board has alternated between external MBRs and in-country representatives in overseas markets, clear performance metrics have not been consistently applied to evaluate the effectiveness of the latter. Rather, reporting from in-country representatives generally outlines activities conducted, without demonstrating measurable outcomes including conversion, visitor arrivals and spending.

MBRs offer specialised expertise, established relationships with trade and media and, most importantly, systematic performance reporting that delivers greater accountability than an in-country representative model. While in-country representatives offer cultural understanding and brand alignment, there are limitations in specialised market knowledge, local networks and performance measurement capabilities MBRs are specifically mandated to provide.

MBRs will be overseen by the Manager: Core Markets and will be appointed in the following markets:

- Nigeria and Ghana with a special, but not exclusive, focus on the promotion of MICE tourism.
- The USA and Canada with a special, but not exclusive, focus on the promotion of “roots” and homecoming tourism.
- The UK and Scandinavia, with a focus of maintaining and expanding the demand for sun, sea and sand tourism, but with a specific mandate to attract experiential and explorer market segments.
- Benelux (Netherlands and Belgium) and Germany, with a focus of maintaining and expanding the demand for sun, sea and sand tourism, but with a specific mandate to attract experiential and explorer market segments.

These agencies will serve as extensions of The Gambia’s marketing team, providing on-the-ground PR and trade liaison support to effectively position the destination, drive trade engagement, and secure media visibility.

The objectives of appointing MBRs are to:

- Improve relationships with travel trade partners (tour operators, travel agents, airlines) and facilitate their integration of The Gambia into product portfolios.
- Strengthen media engagement and PR efforts, ensuring The Gambia gains consistent, high-quality exposure in travel and lifestyle media.
- Support in-market activations such as roadshows, training workshops, and consumer events to increase awareness and conversion.

Agencies should be selected based on:

- Proven track record in promoting African or eco-tourism destinations, with a deep understanding of positioning nature-based, cultural, and sustainable tourism experiences.
- Dual expertise in PR and trade representation, ensuring they can manage media outreach, press engagement, and travel trade relations effectively.
- Established networks with influential tour operators, media, and travel platforms in key source markets.

- Experience in multi-channel destination marketing, including digital, event-based, and strategic B2B marketing.
- Ability to execute trade and media training, including workshops, roadshows, and familiarisation trips.

The following approach will be followed:

- Develop and issue a Request for Proposals (RFP) inviting agencies in selected markets that meet the outlined criteria to submit bids.
- Evaluate proposals based on strategic fit, past performance, market reach, and cost-effectiveness.
- Appoint agencies on one-year contracts, renewable based on performance.
- Establish clear KPIs for each agency, including:
 - Number of new tour operators engaged and selling The Gambia.
 - Number of media placements secured (articles, TV/radio features, digital coverage).
 - Value of earned media and PR reach.
 - Trade and media training sessions conducted.
 - Attendance and engagement in events, roadshows, and trade fairs.
- Ensure agencies are fully aligned with The Gambia's brand strategy, market and product diversification goals and the #FindMySmile campaign.
- Provide agencies with marketing toolkits, digital assets, and messaging guidelines to maintain consistency.
- Require agencies to submit quarterly reports on their activities, impact, and challenges, allowing for real-time strategy adjustments. MBRs will be required to show ROI on all marketing investments which go beyond a list of activities and include performance metrics; currently the scenario with in-country representative reporting.
- Evaluate agency impact annually against the pre-defined performance metrics to determine contract renewals, adjustments, or expansion into additional markets.

c) Improve the skills and capacity of GT Board to optimise marketing execution

While the majority of staff are well-qualified, substantial gaps exist in sectoral experience in the tourism industry and knowledge and skills in key aspects of the diversification strategy. The following activities will be undertaken to strengthen organisational capacity and knowledge for effectively executing the marketing and investment promotion strategy:

- Strengthening recruitment and appointment processes to ensure (especially senior) candidates are adequately equipped and experienced to implement the tasks assigned to them.
- Investigating and procuring high-quality short-course training opportunities in major gap areas, these include, among others:
 - Business processes and key relationships in the travel channel beyond charter and packaged distribution channels.

- Knowledge of the decision-making and information needs and channels used by various targeted source markets and consumer segments (like nature-based tourism, adventure tourism, MICE and others).
- Application of digital marketing and AI technologies.
- Importance and requirements of sustainable and regenerative tourism.
- Effective crisis management.
- Contracting market-based experts and other specialists to support marketing execution in critical areas of trade marketing, MICE, digital marketing and other critical execution areas.
- Equipping Managers to apply performance and evidence-based planning and decision-making in setting measurable marketing objectives and devising target market strategies, using techniques such as those applied in this strategy document.

d) Restructure the Product Development, Investment & Culture Department of the GT Board

In parallel with strengthening the marketing function, the effective implementation of the market diversification strategy requires building the Board's capacity to develop products that will drive market diversification and prepare them to be taken to the investment market. This requires enhanced product development and investment skills and processes to coordinate their activities internally and with external agencies.

A proposed reorganisation of the department is shown in Figure 20 below. It involves establishing separate units with dedicated capacity for product development and investment. This will enable resources to be focussed on new product development areas that will drive the diversification strategy without losing focus on existing legacy products while elevating the importance new investment mobilization. While the final structure will require a more detailed organisational analysis, the proposal includes the following key adjustments:

- Supporting the Head of Department with 2 Managers, responsible for Product Development and Investment. This will allow the HOD to focus on product and investment strategy development, dealing with high level investment issues and coordination with other departments in GT Board and MDAs. Specific roles are:
 - The Product Development Manager will oversee the product development process including concept development, research, assessment, product testing and refinement and then work with the Investment Manager to develop bankable investment propositions. The Manager would work closely with the Marketing Department at key points along the product development pathway through design, assessment, analysis, promotion and launch of new products including prospective niche products such as wellness, culinary and Muslim Friendly Tourism. The Manager would also be responsible for the management and curation of the existing portfolio of products including product improvement (such as enhancing cultural integrity of performances, upgrading of sites), quality control and developing and maintaining a Product Inventory Management System including standing registries with real-time updates of all tourism products and services in partnership with regional tourism officials.
 - Three Product Development Senior Officers would support the Manger. Two of these will be responsible for new product development in the strategic areas of

focus – Nature Based Tourism and River Tourism. The third Senior Officer would be responsible for managing existing products and TDA development.

- The Investment Manager will oversee all investment related matters including establishing criteria for investment selection and prioritization, mobilizing new investment including managing the approvals process, establishing monitoring and evaluation systems to measure the success of investments, managing existing investments in the TDA and overseeing the TDA inspectorate. The Investment Manager would be supported by two Senior Managers - one responsible for mobilizing new investment and one responsible for investment processing including investment approvals and aftercare.
- Regional tourism representatives will continue to report to the HOD.
- The separation of these functions will allow for the building of specialized skills in the critical areas of product development and investment mobilization while building sufficient redundancy to ensure effective succession planning. The structure will enable the Department to make a focused contribution to the Destination Marketing and Product Development Workgroup based on enhanced skills and analytical capability.

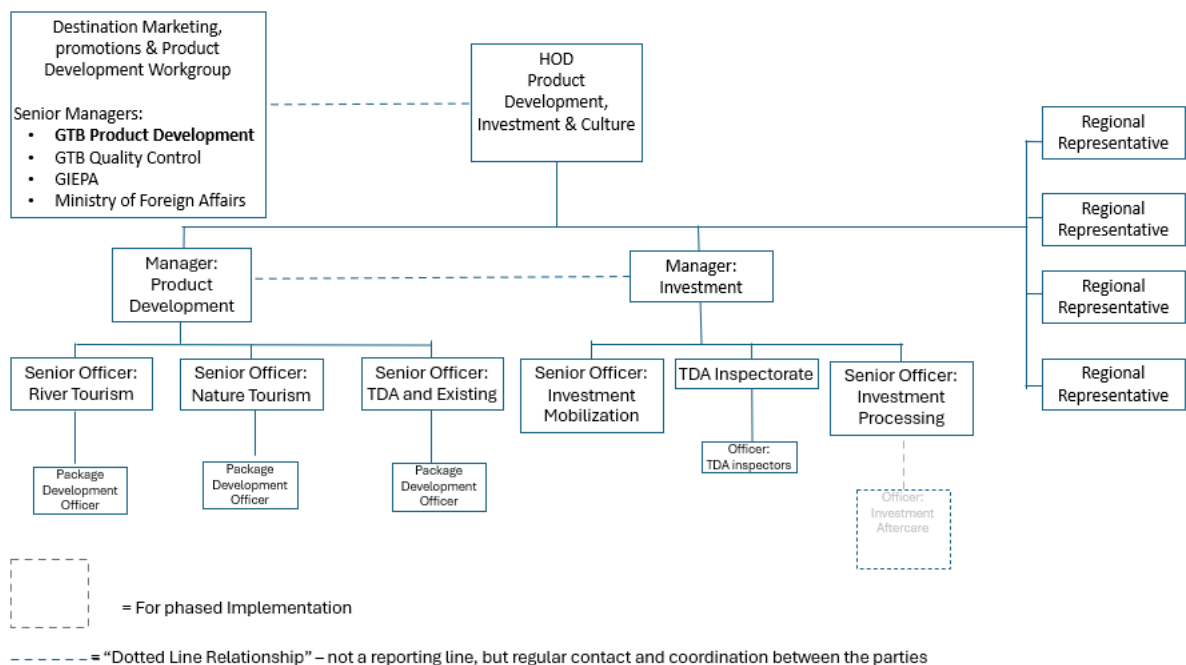


Figure 20 Proposed restructuring of the Product Development, Investment & Culture Department of GT Board

e) Strengthen investment promotion capacity and coordination

The strategy includes actions which will build tourism investment promotion capacity and coordination across agencies. These include tools such as agreed criteria for investment selection and prioritization, a targeted investment strategy, a common database for key industry statistics and indicators and a common data platform for sharing information and promoting investment opportunities to the investor community. Together, these tools will form important instruments of collaboration for all agencies involved in tourism investment promotion.

To continue building the capacity of public sector officials involved in tourism investment promotion The Gambia should consider ongoing training for all personnel involved in investment promotion through the following:

- Ongoing training in product development to ensure selected products and experiences are well designed and aligned with market demand.
 - Capacity building in project screening and evaluation to ensure prioritised projects align with the destination development strategy and are adequately assessed for commercial viability.
 - Workshops on best practices in tourism investment promotion including topics such as organisational structures, inter-agency collaborative mechanisms, goal setting, investment attraction, promotional techniques including direct selling and selection and attendance at investment forums, investor management and aftercare.
 - “Deep dive” exploration of successful case studies in tourism investment promotion including the use of different approaches such as ‘destination’ vs ‘product’ based strategies, effectiveness of different outreach methods such as roundtables, direct selling, investment forums and marketing, sales and advertising techniques.
- e) Study tours to successful destinations to observe how investment promotion strategies are designed, executed and monitored in practice.

f) **Ensure sustainable and growth-oriented product development and destination marketing funding**

While the current system of funding the GT Board through a dedicated departure levy is commendable since it rewards affective market growth with higher revenue, the model also incentivises a short-term growth and volume-driven approach, and as such may discourage the GT Board from investing some marketing resources in a longer term, value driven marketing strategy.

In addition, product development and advancement, as proposed in this document require substantial additional investment to ensure diversification of experiences and improved quality and variety of visitor facilities and infrastructure.

This risk of focusing solely on a short-term, volume driven marketing approach will be addressed by setting a portion of funds aside specifically for investment in product development and marketing in underdeveloped segments and source markets, as identified in the target market strategy. Potential options to be considered are:

- The Treasury providing GT Board with an earmarked subvention to be invested in product diversification and attracting new source markets and segments; and/or
- GT Board setting aside an agreed and consistent proportion of levy-generated funds specifically for new market exploration.
- Cooperative marketing, with private sector products and intermediaries paying towards participation in marketing and product development initiatives, events and campaigns.

4.3.2 Strategy 3.2: Strengthen private-public and public sector coordination and partnerships

The marketing strategy will succeed only if it is conducted in close partnership with all government MDAs, the private sector and local communities. For The Gambia to compete effectively in the international tourism marketplace, public and private sector efforts must be seamlessly aligned. Structured mechanisms will be established for collaboration that leverage the respective strengths of government and industry - combining the strategic oversight and destination-level perspective of the GT Board with the market knowledge, operational expertise, and investment capacity of private businesses, supported by local communities. This will result in:

- Limited marketing funds being extended through co-investment models, with private sector matching or supplementing public funding for key initiatives.
- All stakeholders communicating aligned messages about The Gambia and the #FindMySmile campaign, reinforcing the destination brand rather than creating competing or contradictory narratives.
- Market insights flowing freely between public and private entities, informing responsive strategies based on comprehensive data rather than fragmented information.
- Private industry taking active ownership of destination promotion rather than viewing marketing as solely the government's responsibility.
- Trade marketing strategies reflecting diverse stakeholder input, ensuring relevance across different tourism sub-sectors and business sizes.
- Both public and private sectors committing to measurable deliverables with transparent reporting on outcomes and return on investment.

A strengthened partnership between GT Board and other stakeholders will be pursued through the following mechanisms.

It should be noted that MoTAC has formulated a "Policy for collaborative destination marketing in The Gambia", which was in the final stage of validation at the time of writing this report. MoTAC was also working on a "Policy for Collaborative Destination Development in The Gambia".

4.3.2.1 Actions

a) Establish the 'Team Gambia' partnership committee

'Team Gambia' will be a formalised marketing partnership initiative between GT Board, private sector organisations, key MDAs and local tourism organisations that could support destination promotion (GIEPA, Ministry of Foreign Affairs, NGOs and others), based on:

- Their commitment to carry and promote The Gambia tourism brand and marketing campaigns, wherever possible.
- Their commitment to actively participate in and support the execution of tourism marketing strategy through financial and/or in-kind support.

Team Gambia will be formalised through establishing a standing Team Gambia Committee (TeamCom), led by GT Board and consisting of nominated knowledgeable representatives of

each of the tourism trade associations and relevant MDAs identified by GT Board. TeamCom will meet at least three times per annum. Project specific workgroups may be formed from time to time to investigate or advise on particular matters.

Among others, TeamCom activities and interactions will include the following:

- Conducting an annual joint planning workshop. A facilitated session bringing together key stakeholders to establish shared objectives, identify marketing priorities, and allocate resources for the coming year.
- Collectively participating in marketing activities. Where GT Board engages in marketing outreaches such as the #FindMySmile campaign, trade shows, roadshows, fam trips and other initiatives, every possibility will be pursued for private operators to join such engagements.
- Regularly reviewing progress. Regular accountability meetings where progress is assessed against goals, allowing for course correction and reallocation of efforts as needed.
- Engaging in a matching fund programme. For qualified projects, the GT Board will match private sector contributions at predetermined ratios (1:1 or 2:1), effectively doubling or tripling available resources for strategic initiatives.
- Contributing in-kind. Private businesses will be asked to contribute products, services, and expertise (accommodation for fam trips, content creation, specialised market knowledge) in exchange for enhanced visibility, recognition, and participation in strategic initiatives.
- Sharing market intelligence. Creating opportunities for public and private sector partners to share insights from their respective marketing engagements, creating a comprehensive picture of trends and opportunities.

b) Establish an inter-governmental workgroup to strengthen marketing and investment promotion coordination within GT Board and with other MDAs

Giving effect to this marketing, branding and investment promotion strategy will require an integrated approach:

- Within GT Board, especially between the Marketing, Product Development and Quality Control Departments to ensure that the expectations created in the market are matched in respect of product and service supply.
- With other arms of government such as GIEPA, Gambia Immigration Services, Civil Aviation Authority and others, to ensure that the investment promotion strategies included here are effectively and seamlessly executed and fulfil market needs.

As such a standing Destination Marketing, Promotions & Product Development Workgroup, as proposed in the NTPS, will be established, which will:

- Include the Heads of Departments and senior officials on the GT Board Marketing, Product Development and Quality Control Departments; senior representative(s) of Ministry of International Cooperation and Gambians Abroad (MoFAIC &GA) and GIEPA.

- Invite, when required, other MDA's such as Gambia Immigration Services, GCAA, Ministry of Economy, National Planning & Industrial Development (MoEPID) and others to join the workgroup on an ad-hoc basis.
- Meet on a regular (monthly and ad hoc, depending on issues under consideration) basis to take stock of progress made with tourism marketing and product development and address constraints in advancing the marketing and investment promotion strategy.

4.3.3 Strategy 3.3: Enhance the knowledge and skills of entrepreneurs and service providers to meet the needs of a diversity of travellers

The Gambia's leisure and MICE tourism value chain has been largely controlled by a few large tourism and hospitality operators. While a few smaller tour operators have entered the industry in recent years, small and medium enterprises are limited with individuals mostly operating at an informal, micro level as craft producers, juice pressers and so on. The many informal accommodation enterprises are by and large geared at servicing the repeater market and those visiting friends and relatives.

Successful diversification of tourism demand and supply and spreading of tourism beyond the coast will require a significant expansion in authentic, innovative products and services that appeal to experiential travellers, as outlined in the target market strategy. An increase is especially needed in specialised, well trained and equipped smaller tour operators and guides.

4.3.3.1 Actions

a) Establish a tourism innovation and entrepreneurship capacity building programme

A multi-year training and mentorship programme will be launched to training up and support at least 20 emerging small and medium-sized businesses per annum, with the necessary knowledge and skills to enter the international market and provide the various target market visitors with suitable experiences.

GT Board will partner with a suitable International Cooperating Partner (ICP) such as the International Trade Centre (ITC), Centre for the Promotion of Imports (CBI) or another to provide dedicated training and coaching support to selected program participants. The following activities will be pursued:

- Providing training to participating stakeholders on various general tourism management topics such as:
 - Business planning and operations.
 - Sustainable tourism business management.
 - Visitor management and care.
 - Experiential guiding and interpretation.
 - General health and hygiene standards.
 - Hospitality (accommodation and catering) standards.
 - Visitor information management.
 - Visitor statistics and research.
- Providing training and guidance to participating stakeholders on various marketing topics including:

- Opportunities for market entry – source market and target segment profiles and what they need.
 - The tourism value chain and distribution channels, how it all works.
 - Principles and practices of business differentiation, branding, effective business management and client service.
 - Effective digital marketing and use of digital marketing platforms.
 - Maximising marketing exposure at tourism fairs and workshops.
- Providing ongoing individual business coaching to business participants.

4.3.4 Strategy 3.4: Improve monitoring and evaluation of the marketing strategy

Given the specific growth targets of the strategy and the focus on diversification, it will be important to consistently measure and monitor the results of the actions implemented and to adjust the strategies and actions on a regular basis to ensure maximum effectiveness towards achieving the vision and growth objectives.

It is recommended that a specific post, preferably that of internal auditor, be tasked with the responsibility for tracking and reporting on progress made and performance achieved against the strategy objectives and performance indicators specified in the implementation action plan.

The following actions will be implemented in this regard.

4.3.4.1 Actions

a) Establish valid and reliable statistical measurement

Measurement of progress and success in reaching the stated growth objectives relating to non-charter market diversification, nature and culture-based tourism, seasonality expansion and other specific success indicators requires high quality, valid and reliable statistics collection and management.

Methodological factors for ensuring statistical consistency include, among others:

- Meticulous data collection at immigration entry points where passport and other information of the entire visitor population is collected, especially at the international airport. Recording correct information regarding visitors' Purpose of Visit and Length of Stay is particularly important, in addition to the usual passport details recorded.
- Representative and consistent sampling in conducting visitor surveys. Sampling should be spread throughout the year and should be designed to accommodate stratification by source markets, with results being scientifically weighted to reflect the visitor population as best possible.
- Professional selection of fieldworkers to ensure suitable capacity and capabilities in respect of customer relations, communications and diligence during fieldwork and data collection. Fieldwork controls should be put in place to ensure that interviewers select of respondents strictly in accordance with the agreed random sampling technique(s) employed. Where possible, appropriate hardware and software technologies, including Artificial Intelligence (AI), should be employed to overcome language and other interpretation challenges.

- Consistent wording and structure of questionnaires used, to ensure relevant and bespoke data is captured for measuring the Performance Objectives and Indicators stated in the strategy.
- Faultless data capturing and use of appropriate technologies in this regard.
- High quality and easily digestible reporting formats and opportunities for more detailed data manipulation.

The recently completed “Action Plan for Improvement of Tourism Statistics” and subsequent implementation project will no doubt go a long way towards addressing current data inconsistencies and the ability of effectively measure progress.

b) Measure and report on marketing activity outcomes and impacts

GT Board and the Ministry of Culture and Tourism

Since the above marketing strategies and actions require substantial financial investment, it will be important to track and measure performance indicators for all activities.

These could include, but not limited to:

- Regarding the overall success of the strategy, with reference to the NTPS and Strategy objectives indicated in Section 3.3 above, including:
 - International tourism arrivals.
 - Domestic tourists.
 - Hotel bed stock.
 - Employment.
 - Foreign exchange earnings (US\$ Mn).
 - Contribution to GDP (%).
 - Average expenditure per visitor and by purpose of visit (including average daily expenditure and length of stay).
 - Holiday and MICE tourism arrivals by source market.
 - From the traditional markets in Western and Northern Europe.
 - From the non-Traditional markets in Southern Europe, Eastern Europe, Africa (conference) and the USA.
 - Share of tourists citing nature and culture experiences as primary reason for visiting The Gambia, by source market.
 - Out-of-Season arrivals (April-October), by source market and purpose of visit.
 - Accommodation inland from the coast (rooms).
 - Weekly scheduled airline seats available from Europe, by source market and route.
- Regarding Return on Investment (ROI) of tactical interventions, including:
 - Digital consumer marketing:

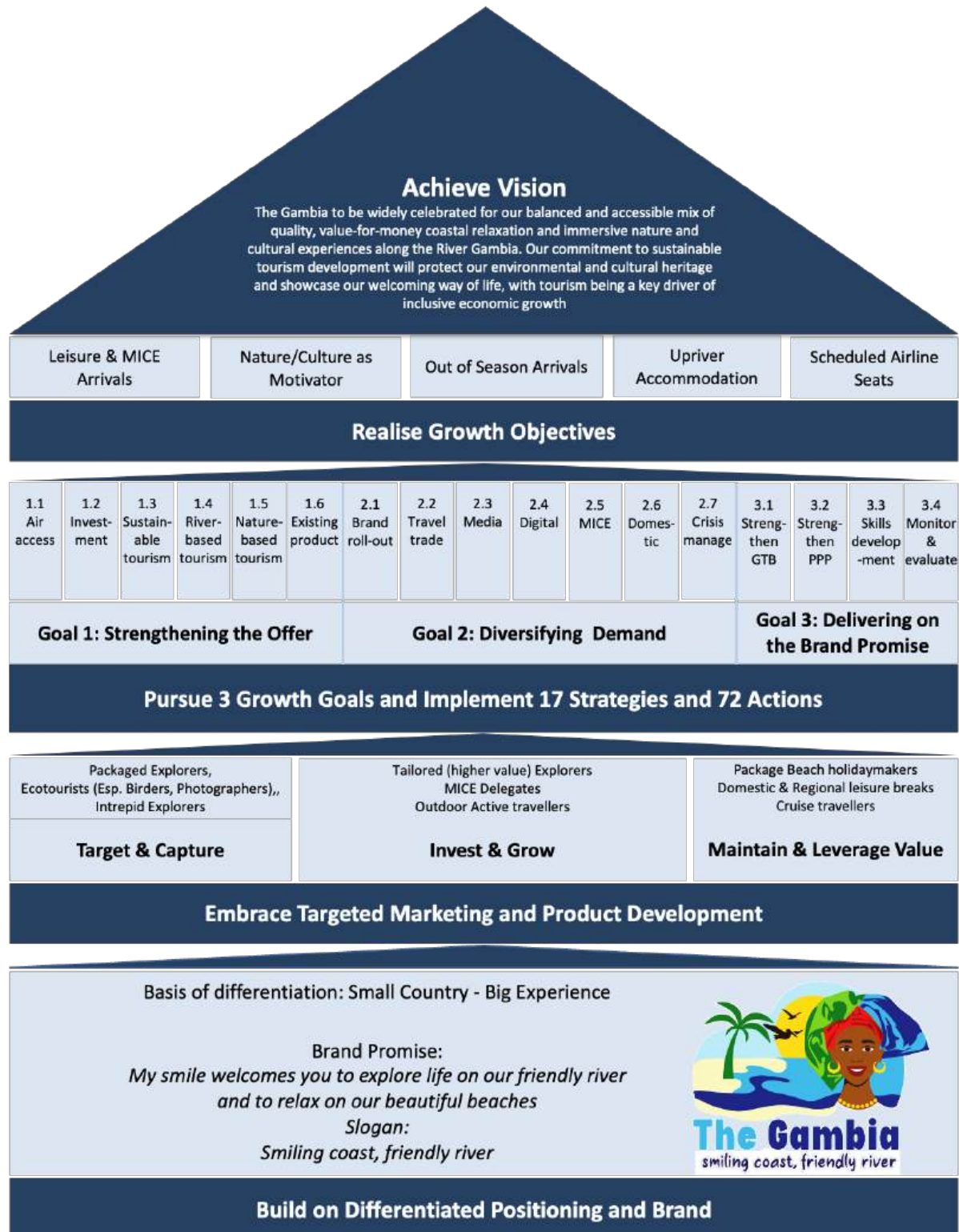
- Awareness: Website traffic, social media reach, impressions, and influencer campaign metrics.
 - Engagement: Average time on site, bounce rate, social media engagement rates (likes, shares, comments), email open and click-through rates.
 - Conversion: Enquiry conversion rates, cost-per-acquisition, lead quality, and remarketing ROI.
 - Retention and advocacy: Repeat visit rate, UGC volume, referral rates, and net promoter score (NPS).
- Travel trade B2B marketing. The following success measures are highly reliant on a close relationship with the private sector, who are the sellers of tourism and who are able to gauge the return on marketing investment.
- Engagement: Number of serious buyers engaged and the time spent with each during the activity; number of leads captured of operators and agents interested in selling The Gambia or expanding their current programmes.
 - Conversion rate of leads 6 months after the engagement, i.e. the percentage of leads that turn into paying travellers and new trade partnerships initiated at the event.
 - The value of deals made as a result of attendance of trade shows, workshops, roadshows, etc. and the Customer Acquisition Cost (CAC), i.e. the total cost of the activity divided by the estimated or projected gain in visitor numbers gained as a result. The lower the investment per visitor gained, the better.
 - Growth in visitor numbers directly associated with joint marketing programmes or marketing support funding.
 - Gains in trade brand awareness and perception, based on travel trade surveys during which respondents are prompted to ascertain whether their knowledge of The Gambia is related to any of the marketing activities
 - Media coverage or PR mentions, through measuring any press or media coverage the event or activity generated. Coverage in industry publications or news can enhance brand perception.

c) Critically evaluate and update strategy on an annual basis and adapt as necessary

Based on the performance measurement and monitoring conducted, the strategy should be evaluated on at least an annual basis and actions should be revised where necessary to improve performance and to respond to market trends.

4.4 The strategic plan in a nutshell

The diagram below provides a condensed overview of the key aspects of the strategy.



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Appendix A: Source market and market segment profiles

A1. Target source market profiles

NOTE: The following section presents a summary of the profiles of source markets included in the target market strategy. A more detailed analysis of source market profiles is available from GT Board upon request.

United Kingdom

Section	Key Points
Profile & Characteristics	<ul style="list-style-type: none"> • Largest traveller group is 25-34 years old (18-44 is primary demographic) • 41 to 60-year-olds with high disposable income dominate luxury segment • Families represent significant market share (cost-conscious due to rising living costs) • Growing solo travel trend (34% of UK travellers desire solo adventures) • 40 million UK tourists travelled in 2023
Benefit to The Gambia	<ul style="list-style-type: none"> • UK winter months align perfectly with The Gambia's dry season (November-May) • Historical connection as former British colony reduces cultural barriers • Widespread English language use throughout The Gambia • Excellent value for money compared to Caribbean or Canary Islands • Tourism offerings match UK preferences (beaches, nature, cultural immersion)
General Travel Behaviour	<ul style="list-style-type: none"> • Booking patterns: 15% book within 1 month, 35% 1-3 months ahead, 23% 4-6 months ahead, 27% over 6 months • Key booking periods: January-March and September-November • Most travel occurs between December and March • 57% use online searches as primary planning resource • Motivated by relaxation (38%), authentic experiences, natural attractions, adventure, and food experiences
Product Requirements	<ul style="list-style-type: none"> • Accommodation preferences: traditional hotels, eco-lodges, unique historical properties • Growing demand for properties with clear sustainability credentials • Preference for locally inspired design over generic international styles • Active experiences beyond sunbathing (water sports, beach yoga, guided swimming) • Desire for cultural immersion (village visits, markets, historical sites, Roots tour) • Increasing interest in food tourism (cooking classes, local cuisine tastings)
Marketing Channels	<ul style="list-style-type: none"> • Shows/Events: World Travel Market London (November), Experience Africa, Destinations Show, Adventure Travel Show • Media: The Guardian, Sunday Times, BBC Travel, Travel Weekly, TTG, National Geographic Traveller, Africa Geographic • Content Creators: @traveltwo_ (nature), @thecuriouspixie (family), @charliepauly (adventure)

	<ul style="list-style-type: none"> • Online Forums: TripAdvisor, Lonely Planet Thorn Tree, Safaritalk.net, Facebook groups • Associations: ATTA, AITO, Adventure Travel Trade Association • Key Tour Operators: The Gambia Experience, Scott Dunn Travel, Audley Travel, Responsible Travel, Trailfinders, Intrepid Travel, Wild Frontiers, NatureTrek, Abercrombie & Kent
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Germany

Section	Key Points
Profile & Characteristics	<ul style="list-style-type: none"> • Largest demographic segment is 50-59 (18.2%), but 36-45 age group dominates outbound tourism (32%) • 27.1% earn between 36,000-58,999 Euros annually • Majority are married or cohabitating • 111.89 million outbound trips taken in 2023
Benefit to The Gambia	<ul style="list-style-type: none"> • Preference for sun and beach holidays • Relaxed atmosphere for rest and rejuvenation • Authentic cultural experiences match desire for local interactions • Birdlife and natural areas appeal to interest in nature-based tourism • Good value for money appeals to price-conscious travellers • Relatively short flight times • Widespread English reduces language barriers for German tourists • Perceived as one of West Africa's safer destinations
General Travel Behaviour	<ul style="list-style-type: none"> • 77% of Germans took at least one vacation in 2023 • Rely on personal recommendations (50%), search engines, travel TV programmes, and online reviews • 43.8% book online, with 60.6% preferring direct booking • Package trips popular for international travel outside Europe • Average booking time is 4.6 months before departure • Family travel is prevalent (71.1%), and multigenerational trips • Typically stay 7-14 days for long-haul destinations • Peak travel periods align with school holidays (July-August and December-January) • Solo travel increasing, mostly among younger demographics (28%)
Product Requirements	<ul style="list-style-type: none"> • Prefer 3- to 4-star hotels (52.13%) offering comfort and value • Expect Wi-Fi, comfortable beds, hot water, and effective AC • Value proximity to attractions, beaches, or natural environments • Seek birdwatching opportunities, mangrove exploration, and wildlife encounters • Interest in Gambian music, crafts, and cultural traditions • Desire spaces for rest and rejuvenation, including wellness • Value meaningful interaction with local communities • High expectations for service quality and punctuality • Appreciate detailed pre-trip information and transparent pricing • Welcome information in German despite good English proficiency

Marketing Channels	<ul style="list-style-type: none"> • Shows/Events: ITB Berlin (March), F.re.e Leisure & Travel (Munich), CMT Stuttgart (January), TourNatur Dusseldorf • Media: Frankfurter Allgemeine Zeitung, Die Welt, Die Tageszeitung, Bild, Die Zeit, FVW Travel Talk, Extratour, Reise & Preise • Content Creators: @hannes_becker (adventure), @journeyious (solo travel) • Online Forums: Stefan Loose Globetrotter forum, Erfolgreich Reisen, TripAdvisor, Fair Ways • Social Media Groups: Reisen in Afrika, Reise nach Ausland, Frauen, die alleine reisen • Associations: Annerkante Spezialisten für Afrika Reisen (ASA), Voice for Africa, German Travel Association (DRV) • Key Tour Operators: African Dream Travel, Taruk, Abendsonne Africa, My African World, Chamaleon, Akwaba Afrika, Ivanowski's Reisen, Diamir, Natürlich Reisen, Dertour
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United States (diaspora)

Section	Key Points
Profile & Characteristics	<ul style="list-style-type: none"> • World's second-largest tourism spender with significant potential from African American and Gambian diaspora segments • Over 25,000 Gambian emigrants residing in the US • Black American "cultural" travellers spend an average of US\$2,078 per trip versus US\$1,345 for all African American travellers • Strong interest in exploring cultural heritage and making meaningful connections with local communities • High engagement with social media platforms • Tendency to travel in groups and value shared experiences
Benefit to The Gambia	<ul style="list-style-type: none"> • The Gambia is the setting for Alex Haley's novel "Roots," resonating strongly with African Americans seeking heritage exploration • Meaningful connection to the transatlantic slave trade history • Rich cultural heritage offers cultural immersion opportunities • For Gambian diaspora, opportunity to reconnect with homeland • English-speaking country with predominantly Black population • Preference for longer stays, potentially increasing economic impact • Even distribution of travel throughout the year reduces seasonality
General Travel Behaviour	<ul style="list-style-type: none"> • Seek immersive experiences connecting them with heritage • Decision-making often involves emotional motivations • 30% book trips 5+ months in advance • Social media plays significant role in booking decisions • Meticulous in travel planning and budgeting • Rely on recommendations from friends/family, online reviews, and trusted travel content • Significant use of travel agencies for complex itineraries • Interest in supporting local communities during travel

Product Requirements	<ul style="list-style-type: none"> • Clean, comfortable accommodation with reliable amenities and good value for money • Good security measures in safe areas • Expectation of culturally sensitive and respectful service • Reliable Wi-Fi and communication facilities • Opportunities to learn traditional skills such as cooking and crafts • Authentic engagements with local communities • Guided experiences related to the transatlantic slave trade • Participation in cultural celebrations
Marketing Channels	<ul style="list-style-type: none"> • Shows/Events: Black Travel Expo, We Are Africa North America, Black Travel Summit, IPW (Pow Wow), New York Times Travel Show • Media: Travel Noire, Ebony, InClub Magazine, Essence • Content Creators: Oneika The Traveller, Carol Cain of Girl Gone Travel • Online Forums: Rick Steves Forum, TripAdvisor, Nomadness Travel Tribe, Black Girls Travel Too • Social Media Groups: Travel Addicts Life, Lonely Planet Travelers Group, Must Do Travels Group, Travel Divas • Associations: Black Travel Alliance, African American Travel Conference (AATC), Association of Black Travel Professionals (ABTP), African Tourism Association, Association for the Promotion of Tourism to Africa (APTA) • Key Tour Operators: Explore Inc, Continent Tours, Henderson Travel Service, Diaspora Travel & Trade, Africa Calls Tour, Royal African Company, Palace Travel

Benelux (Netherlands and Belgium)

Section	Key Points
Profile & Characteristics	<ul style="list-style-type: none"> • Netherlands is The Gambia's second-largest source market (26% of visitors), Belgium fifth-largest (5%) • Dutch population approximately 17.9 million, most common age group 25-34 years (19%). Belgian travellers predominantly aged 35-54, and show strong destination loyalty • Belgian outbound travel originating from: Flanders (58.7%), Wallonia (26.8%), Brussels (14.6%) • Travellers generally well-educated, digitally savvy
Benefit to The Gambia	<ul style="list-style-type: none"> • Established market with strong historical connections • "Sun-sand-sea product" aligns with interest in beach holidays • European winter coincides with peak tourism season • Competitive pricing compared to other winter sun destinations • Existing relationships with major tour operators (TUI, Corendon) • Ecotourism focus aligns with environmental consciousness • Planned youth-friendly products could attract younger segments
General Travel Behaviour	<ul style="list-style-type: none"> • Dutch travellers are thorough researchers using search engines, OTAs, and recommendations • Preference for package trips bundling flights and accommodation for non-European travel • Online booking prevalent, though travel agencies and tour operators remain important

	<ul style="list-style-type: none"> • Dutch typically plan trips 4.6 months in advance • Prefer international trips of 1-2 weeks duration • Significant number of travellers are repeat • Beach and leisure activities favoured by majority of travellers
Product Requirements	<ul style="list-style-type: none"> • Value for money critical; clean, comfortable accommodation • Balance between modern comfort and authentic local experience • Clean, safe beaches with opportunities for relaxation, swimming • Nature-based tours appeal to environmental interests • Cultural experiences align with cultural exploration desire • Adventure activities (kayaking, hiking, fishing) required • Culinary tours, cooking classes, and local cuisine sampling
Marketing Channels	<ul style="list-style-type: none"> • Shows/Events: Vakantiebeurs (Dutch Travel Week), Fair for Special Journeys (Amsterdam), Brussels Travel Expo, Salon des Vacances • Media: De Standaard, Le Soir, De Telegraaf, Explore Africa, Grande Magazine, Voyago.nl, Reisgraag.nl, TRAVMagazine • Online Forums: Rick Steves Travel Forum, TravelTalkOnline, Afrika.nl, Reistips.be, Holidayguru.be • Social Media Groups: Reizigers België, Facebook travel groups • Associations: ANVR (Netherlands Travel Trade Association), Belgian Travel Confederation, Association of Belgian Tour Operators • Key Tour Operators: TUI Netherlands, Corendon, TUI Belgium, Afrika Plus, African Travels, Go Africa, Djoser, Live to Travel, Pegase, Neckermann

Spain and Portugal

Section	Key Points
Profile & Characteristics	<ul style="list-style-type: none"> • Outbound trips: Spain (26.46 million in 2023), Portugal (11.7 million in 2023) • Dominant Spanish traveller age groups: 55-64 years (26.28%), 45-54 years (19.5%) • Generally experienced international travellers • Portugal's historical connections with Africa create cultural familiarity • Different planning horizons: Spanish book at short notice, Portuguese 4-6 months ahead
Benefit to The Gambia	<ul style="list-style-type: none"> • Spain already one of The Gambia's largest source markets • Seasonal direct flights from Portugal increase accessibility • Attractive alternative to Canaries and Cape Verde for Portuguese • Culinary traditions appeal to interest in gastronomy • European winter travel season aligns with peak season • Approximately 25,000 Gambians integrated in Spanish society creates diaspora connections • Rich cultural traditions and warm human connections align with traveller preferences
General Travel Behaviour	<ul style="list-style-type: none"> • 73% of Spanish tourists prefer online booking (primarily OTAs and direct websites) • Traditional agents still important for complex itineraries • Winter is prime season for targeting these markets • Prefer 1-2 week trips for non-European international travel • Top preferences: cultural exploration, beach relaxation, nature activities, adventure • Many Spanish and some Portuguese travellers have limited English knowledge
Product Requirements	<ul style="list-style-type: none"> • 3-4 star hotels most popular, followed by budget hotels • Location: city centre for short stays, beachfront/scenic for long • Breakfast crucial • Seek balance between quality, comfort, and affordability • Value opportunities to engage with local communities • Clean, safe beaches with relaxation, swimming, and water sports • Food and gastronomy play significant role • Interest in authentic experiences (village visits, craft workshops, traditional performances)
Marketing Channels	<ul style="list-style-type: none"> • Shows/Events: FITUR International Tourism Fair (Madrid), BTL-Lisboa (March), INTUR (Valladolid) • Media: El País, Condé Nast Traveler (Spain), Traveler, Voyage, TRAVELBOOK (Spain), Fugas (Portugal) • Associations: Spanish Federation of Travel Agencies (CEAV), Portuguese • Key Tour Operators: Abreu (Portugal), Pinto Lopes Viagens (Portugal), Solférias Operador Turístico (Portugal), Luxo Tours (Spain), TUI Spain, TUI Portugal

Scandinavia (Sweden)

Section	Key Points
Profile & Characteristics	<ul style="list-style-type: none"> • Significant source of outbound travellers despite small population (45.17 million trips in 2023) • Leisure trips dominate (82.1% of total travel) • Key motivating factors: discovering new places (48%), relaxation (32%), historical/cultural exploration (45%) • Price sensitivity important: affordable pricing (50%) and overall costs (56%) influence choices • Safety and health concerns (both 25%) are considerations • Exceptionally sensitive to sustainability issues ("flygskam")
Benefit to The Gambia	<ul style="list-style-type: none"> • Historical connection: Swedish tourists were pioneers of tourism in The Gambia (first group in 1965) • Climatic contrast: Gambia's warm climate provides ideal escape from Scandinavian winters • Existing infrastructure: Tour operator Apollo operates three weekly flights from Sweden, Denmark, and Norway • The Gambia's consistent warm climate, beaches, and sunshine appeal to cold-weather escapees
General Travel Behaviour	<ul style="list-style-type: none"> • 47% exclusively arrange own travels, 40% combine independent planning with agencies • Travel companions, typically partners without children or friends • Accommodation preferences: local hotels, known hotel chains • 51% undertake international travel several times yearly • Prefer leisure holidays focused on beach/sun, sightseeing • Proactive in adopting sustainable practices • Air travel extremely common (94% of international trips) • Average stay of 16-20 nights for long-haul destinations
Product Requirements	<ul style="list-style-type: none"> • Support for independent travel planning (information, booking) • High accommodation standards with reliable internet • Visible sustainability practices in accommodation • Beach and relaxation opportunities (preferred by 43%) • Cultural attractions including historical sites, museums • Outdoor activities: walking, hiking, exploring natural landscapes • Clean, safe environment with clear health and safety protocols • Quality local dining options (75% prefer trying local cuisine) • Reliable transport connections and clear visitor guidance • Communications addressing safety and health concerns
Marketing Channels	<ul style="list-style-type: none"> • Shows/Events: Sweden Travel Fair (Stockholm), Senior Göteborg (Gothenburg), TravelXpo (Oslo), Danish Travel Show (Herning), Copenhagen Travel Exhibition • Media: TravelNews Sweden, Standby.dk, Checkin.dk, Reiseliv, Vagabond, FREEDOMtravel, AlltomResor, Helt Vilt, Landgang • Online Forums: Flyprat Forum, Diskujon.no, Rejseforum.dk • Associations: Nordic Travel Retail Group, Association of Swedish Travel Agents and Tour Operators, Danish/Norwegian Travel Agency Associations

	<ul style="list-style-type: none"> • Key Tour Operators: Ving, Apollo, TUI, Escape Travel (Sweden), Rolfs Flyg & Buss (Sweden), Albatros (Sweden), Tema Resor (Sweden)
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Eastern Europe

Section	Key Points
Profile & Characteristics	<ul style="list-style-type: none"> • Rapidly growing outbound tourism market • Poland to reach 18 million international departures by 2025 • Polish citizens most confident in Europe about travel budgets (64% expecting increased spending) • Polish market has excellent seasonal spread (October-December and January-March strongest) • Primary travel motivations: nature, city trips, visiting friends/family, sun and beach • Czech travellers typically 30-49 years old (average age 41) • Czech favoured activities: hiking, historical sites, nature • Two major traveller groups: older traditional package tourists and younger independent adventurers
Benefit to The Gambia	<ul style="list-style-type: none"> • Polish travel season (Oct-Dec, Jan-Mar) aligns perfectly with Gambia's prime tourism season • The Gambia's combination of beaches, cultural heritage, and adventure satisfies both market segments • Year-round warm climate attractive alternative to Mediterranean, especially during European winter • Nature experiences align with primary travel motivators • English-speaking population advantages Eastern European travellers with English as second language
General Travel Behaviour	<ul style="list-style-type: none"> • Almost half of Polish travellers use online channels for booking (slightly below European average) • Polish travellers most likely to travel with partner/spouse (34%), children under 18 (31%), or friends (23%) • 52% plan trips well in advance • 26% book accommodation directly • 75% belong to mid or high price travel segment • Most influential sources: friends/family/colleagues, followed by websites with reviews
Product Requirements	<ul style="list-style-type: none"> • Traditional travellers (older): comprehensive package holidays with quality accommodation • Independent travellers (younger): flexibility in accommodation with customisation options • Nature-based tourism essential (primary travel motivation) • Variety of experiences particularly important for Czechs • Affordability with quality paramount • Clear inclusions and transparent policies in packages • Both sun/beach relaxation and cultural/adventure activities

Marketing Channels	<ul style="list-style-type: none"> • Shows/Events: GO International Travel Fair, Regiontour TourismFair, Czech Travel Market, Holiday World & Region World, International Tourist Fair, World Travel Show, TT Warsaw, Tour Salon • Media: Wiadomości Turystyczne, Rynek Turystyczne, Tourismus.cz, Cot.cz, Turystyka.rp.pl, Onet Podróże, Poznaj Świat, Magazine Podróże, iDnes.cz • Online Forums: Fly4free.pl, Wyjazdy.pl, Cestujlevne.com, Orbion.cz, • Associations: Polska Izba Turystyki, Izby Turystyki, ACK ČR, AČCKA, Kluby Podróżnika • Key Tour Operators: Rainbow Tours, Itaka, TUI Poland, Exim Tours, Logos Travel, Čedok, Fischer, ESO travel, Livingstone
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India

Section	Key Points
Profile & Characteristics	<ul style="list-style-type: none"> • One of world's most dynamic and rapidly expanding markets • Projected 29 million outbound trips by 2025 • Leisure travel to account for 13.9 million departures • Increasing interest in African destinations • Most outbound tourists aged 20s-40s, travelling as families, couples, or friend groups • 1.4 bn population and 30 m diaspora: large pool of travellers • Destination weddings and honeymoons abroad popular
Benefit to The Gambia	<ul style="list-style-type: none"> • Opportunity to tap into India's rapidly growing outbound market (surpassed China in 2022) • Strong alignment between Indian interests (culture, nature, beaches) and Gambia's offerings • Adventure and exploration appeal to India's young travellers • English-speaking population reduces communication barriers • Complementary travel seasons: Indians travel May-June and October-December • Even a small fraction of India's 28+ million annual travellers could significantly boost arrivals
General Travel Behaviour	<ul style="list-style-type: none"> • Distinct peak seasons: summer (April-June) and autumn/winter (October-December) • Long-haul holidays typically 8-14 days • Predominantly travel in groups • Package tours popular for unfamiliar destinations • Mix of traditional and digital booking behaviours • Book flights 2-4 weeks in advance for long-haul • Price-sensitive and value-conscious (comparison shopping) • Prefer well-planned, activity-rich itineraries • Value photogenic landmarks, shopping opportunities • Heavy smartphone users (need Wi-Fi)
Product Requirements	<ul style="list-style-type: none"> • Mid-range to upscale (3-4 star), free Wi-Fi, in-room tea/coffee makers • Family-friendly facilities, triple room or extra bed options, adjacent rooms • Swimming pools, kids' play areas, evening cultural shows • International standards of cleanliness and security

	<ul style="list-style-type: none"> • Many are vegetarian or have dietary restrictions (no beef/pork, halal-only). Include Indian food items or fusion versions (rice, curries, vegetarian dishes). Ample bottled water (Indians don't drink tap water) • Warm, friendly service, respect for religious practices • Access to mosques for Muslims
Marketing Channels	<ul style="list-style-type: none"> • Shows/Events: SATTE (New Delhi), OTM (Mumbai), TTF (multiple cities), IITM (rotating cities) • Media: Travel Trends Today, TravelBiz Monitor, Travel Turtle, Condé Nast India, Travel + Leisure India, Outlook Traveller, Hindustan Times, Times of India Travel • Online Forums: Tripoto, IndiaMike • Associations: IATO (Indian Association of Tour Operators), TAAI (Travel Agents Association of India), TAFI (Travel Agents Federation of India) • Key Tour Operators: SOTC, Thomas Cook India, Kesari Tours, Yatra, Mercury Travels, The Earth Safari, Far Horizon Tours, Compass India Holidays, Travelite (India), TUI India

Domestic & Diaspora market

Section	Key Points
Profile & Characteristics	<p>Domestic: Population of approximately 2.7 million</p> <ul style="list-style-type: none"> • Typically urban residents of Banjul or Serekunda • Middle-class professionals, students, youth and family groups • Budget conscious with modest spending <p>Diaspora: Global diaspora estimated at 118,000-140,000</p> <ul style="list-style-type: none"> • Largest communities in UK (~36,000), US (~25,000), Spain (~19,800), Italy (~22,800), Germany (~15,500) • Generally higher incomes than domestic travellers • Strong economic profile translates to high travel propensity • Motivated by family connections, cultural ties, and investment
Benefit to The Gambia	<ul style="list-style-type: none"> • Provides more consistent year-round market • Revenue has higher retention rate within local economy • Better use of tourism infrastructure during off-peak periods • Domestic travellers "buy more local products and services" • Diaspora serve as unofficial brand ambassadors • Strategic importance for tourism resilience and sustainability
General Travel Behaviour	<p>Domestic:</p> <ul style="list-style-type: none"> • Typically short-duration (day trips or 1-2 nights) • Travel coincides with public holidays, school vacations, cultural events • Predominantly group travel (family outings, school trips, community excursions) • Transport primarily by road (private cars or public minibuses) • Often stay with relatives to save costs • Spontaneous, last-minute with informal organisation <p>Diaspora:</p> <ul style="list-style-type: none"> • Longer stays (2-4 weeks, sometimes a full month) • Travel patterns tied to personal/cultural calendars • Self-arranged trips (not package tours)

	<ul style="list-style-type: none"> • Often combine family visits with business/investment • Significant spending within local communities not operators
Product Requirements	<ul style="list-style-type: none"> • Affordable with low entry price points, group rates • Family and group-friendly facilities with flexibility for groups • Day-use facilities essential • Products that celebrate cultural pride, heritage, local food • Basic safety and hygiene standards even at budget price points • Booking systems accommodating walk-ins or same-day plans • Integration with local social activities (festivals, events)
Marketing Channels	<ul style="list-style-type: none"> • Events: Cultural festivals (former Roots Homecoming Festival, Kankurang Festival, Kartong Festival), sports events, diaspora reunions • Media: GRTS (state broadcaster), Star FM, Paradise FM, City Limits Radio, "The Tourist" radio programme, "Gambia Expedition" TV, The Point, The Standard, "The Tourist" • Diaspora Media: The Fatu Network, JollofNews, Gainako • Online Platforms: What's On Gambia, Access Gambia, Instagram, Facebook, • Diaspora Groups: "Friends from The Gambia", "The Gambian Ass. in Italy" • Associations: Gambian Tourism and Hospitality Association, Gambian Tour Guide Association, National Youth Council, Youth Empowerment Project, Gambian Chamber of Commerce

Regional (West Africa)

Section	Key Points
Profile & Characteristics	<ul style="list-style-type: none"> • Senegal: Primary regional market due to shared borders and ethnic groups. Senegalese visitors include day-trippers, weekend tourists, and visiting relatives • Nigeria: West Africa's largest economy sending business travellers and leisure tourists. Nigerian visitors typically urban professionals, government officials, entrepreneurs • Higher spending capacity than other African tourists • Other ECOWAS: Ghana, Sierra Leone, Guinea, Mali with smaller but growing numbers. Typically travel for business events, conferences, and short stays
Benefit to The Gambia	<ul style="list-style-type: none"> • Less volatile and less seasonally concentrated • Help fill hotels during green (rainy) season and summer • Higher retention of spending in local economy • Natural alignment with regional tastes and culture • Easy first foreign trip for many West Africans • Visa-free travel for all ECOWAS citizens (up to 90 days) • Contributes to sustainable and diversified tourism sector
General Travel Behaviour	<ul style="list-style-type: none"> • Different travel seasonality from Europeans • Travel during regional holidays • Less likely to cancel trips due to rains or minor outbreaks • Stay: Senegalese (2-3 nights), Nigerians/Ghanaians (a week)

	<ul style="list-style-type: none"> • Business travellers often add leisure days (5-7 days total) • Typically travel in small groups (family, friends, colleagues) • Spontaneous and last-minute booking habits • Active use of social media (Facebook, Instagram) • Active and sociable travellers interested in nightlife
Product Requirements	<ul style="list-style-type: none"> • Comfort and modern amenities (air conditioning, Wi-Fi) • Business travellers prefer internationally rated hotels (4-star) • Flexibility in check-in/checkout times and walk-in bookings • Proximity to entertainment and dining venues • Reliable electricity, security, and parking • Warm hospitality with bilingual staff (English, French) • Halal compliance for Muslim travellers, richly spiced food • Beach relaxation, nightlife (nightclubs with African music) • Cultural heritage sites, shopping for goods or local fashion • Community interaction (visiting friends, local festivals) • Faith facilities (prayer mats, mosques, church service) • Connectivity (Wi-Fi, local SIM cards with good mobile data)
Marketing Channels	<ul style="list-style-type: none"> • Shows/Events: Akwaaba African Travel Market (Lagos), Accra Weizo forum (Ghana) • Media: The Guardian (Nigeria), ThisDay, Punch, MyJoyOnline, GhanaWeb, Seneweb, Le Soleil, Goge Africa, Channels Television, VoyagesAfric, African Travel Quarterly, Jeune Afrique • Influencers: Irinajo, Tosin Oyewole, Jemila Abdulai, Funmi Oyatogun • OTA Platforms: Travelstart, Jumia Travel, Wakanow • Associations: ECOWAS initiatives, West Africa Tourism Organisation (WATO), Africa Travel Association (ATA) • Key Tour Operators: Wakanow, Travelstart Nigeria, Finchglow Travels, Quantum Travels, Tour Brokers International, Nigerians Travel Too, Stellar Travel, Senegal Decouverte, Nouvelles Frontières Sénégal

A2. Target market segment profiles

Packaged and Tailored Explorers (soft exploration)

Market segment description and profile

Package holidays emerged in the 1960s, revolutionising travel by offering bundled experiences that democratised international tourism. Initially defined by the "sun, sea and sand" model, these packages provided European travellers—primarily families, retirees, and budget-conscious holidaymakers—with accessible, predictable, and convenient travel options¹³.

Despite significant market changes, this model remains resilient. Recent research by Reuters has shown that fixed-price packages continue to appeal to consumers navigating cost-of-living pressures. Operators like TUI report strong pre-tax profits, demonstrating the enduring attraction of comprehensive travel packages¹⁴.

¹³Reuters, 'Package Deals Make a Comeback as Sun Seekers Count the Cost', Reuters, 19 August 2024

¹⁴ Euromonitor International, Chart of the Month: Understanding Consumer Trends in Vacation Planning, 24 June 2024.

However, the tourism landscape is undergoing a profound transformation. The traditional one-size-fits-all approach is giving way to more nuanced, personalised travel experiences that reflect changing consumer preferences, technological advances, and evolving global perspectives on travel.

Traditional package tourists represent a well-established market characterised by:

- Seasonal travel patterns, predominantly during European winter months.
- Preference for all-inclusive, hassle-free experiences.
- Demographic concentration among families, retirees, and middle-income travellers from markets like the UK and Germany.

Motivational drivers for this segment include:

- Desire for relaxation and stress relief.
- Exploration of natural landscapes and wildlife.
- Engagement in recreational activities.
- Social connections through travel (visiting friends and relatives).
- Accessible adventure and water sports experiences.

Within this broader package holiday market, travellers can be further classified into several sub-segments:

- **Entertainment:** Focussed on vibrant beach destinations with a lively nightlife.
- **Luxury beach:** Catering to high-spending consumers who demand exclusive, private settings with premium amenities and personalised services.
- **Cultural and heritage:** Combining beach relaxation with visits to historical sites and local traditions.
- **Ecotourism:** Prioritising sustainable, environmentally responsible practices in pristine natural settings.
- **Family beach:** Offering family-friendly destinations with suitable activities and accommodations.
- **Adventure and water sports:** For those seeking activities such as surfing, diving, and snorkelling, along with other mild adventures.
- **Leisure beach tourism:** Focused on relaxation and simple enjoyment of the beach atmosphere.
- **Wellness and health:** Integrating spa treatments, yoga, and meditation with beach leisure.

However, a transformative trend within this segment is the emergence of dynamic package explorers—travellers who leverage digital platforms to curate highly personalised travel experiences. This segment represents a significant shift from passive consumption to active travel curation.¹⁵

¹⁵ The Travel Booster, 'Dynamic Packaging: The Future of Travel', Travel Booster, 25 November 2024, https://www.travelbooster.com/blog_post/dynamic-packaging-travel/

Further, a new trend is gaining momentum—the “soft exploration” or slow tourism market¹⁶. Rooted in the Italian Slow Food and Cittaslow movements, soft exploration represents more than a travel trend—it's a lifestyle philosophy emphasising "doing less, feeling more." Recent trends (as highlighted by Condé Nast Traveller) show that even traditionally price-conscious markets are embracing flexible packages that incorporate experiential elements.

This segment is characterised by:

- Modern travellers increasingly value experiences that offer deep cultural engagement and personal enrichment. Rather than sticking to the confines of a resort, these tourists seek out local culinary tours, heritage walks, community-based excursions, and eco-friendly adventures.¹⁷
- Driven by digital technology, consumers in this segment now use online platforms to curate their own itineraries. They often prefer dynamic packages that can be adjusted in real time to include unique local activities and encounters with nature.¹⁸
- As underscored by the global shift toward wellness (e.g. sleep tourism trends¹⁹) and slow travel, these consumers are motivated by the desire to reduce stress, reconnect with local environments, and participate in sustainable practices.
- Driven primarily by millennials, Gen Z, and affluent professionals, soft exploration travellers seek meaningful connections over superficial experiences.

Together these segments suggest a dual opportunity for The Gambia: to continue servicing the traditional, high-volume market while investing in product diversification that caters to the growing demand for soft, experiential, and sustainable tourism.

Package and tailored explorers in The Gambia

The Gambia's distinctive natural and cultural assets position it uniquely within this evolving market. Its beaches, favourable climate, and rich cultural heritage offer compelling propositions for:

- Traditional package tourists seeking familiar, hassle-free experiences.
- Soft exploration travellers desiring immersive, sustainable journeys.

Global tourism trends indicate robust growth in dynamic packaging and soft exploration, presenting The Gambia with an opportunity to:

- Diversify tourism products.
- Extend the travel season.
- Increase per capita spending.
- Capture the growing appetite for sustainable, experience-led travel.

Integrating soft exploration elements—such as community-led cultural tours, eco-friendly accommodation, and local culinary experiences—can reduce overdependence on low-yield,

¹⁶ Dutton, Stephen, 'Mass Market Adopts Slow Travel Features in 2025', Euromonitor International, February 2025, <https://www.euromonitor.com/article/mass-market-adopts-slow-travel-features-in-2025>

¹⁷ Ibid

¹⁸ Ibid

¹⁹ Wikipedia, 'Dynamic Packaging', Wikipedia, https://en.wikipedia.org/wiki/Dynamic_packaging

seasonal package deals. This shift can help lengthen the tourism season, improve per capita spend, and create a more resilient tourism model.

Thus, The Gambia can leverage its natural and cultural assets to not only maintain its traditional market but also to capture a growing global trend that favours diversified and sustainable travel experiences.

General travel behaviour

Traditional package tourists represent a well-established market segment characterised by distinctive travel patterns and preferences. They typically rely on established travel agents and charter airlines, with itineraries carefully structured to minimise planning complexity. Their travel is predominantly seasonal—most notably during European winter months—with travellers spending a significant portion of their time within resort confines²⁰.

Market access represents a crucial factor in travel behaviour, encompassing²¹:

- Number of intervening opportunities before reaching a destination.
- Travel time and associated costs.
- Proximity and accessibility.
- Effort required for travel.

Travellers demonstrate a natural preference for proximate destinations that effectively meet their core needs, with destination selection influenced by a nuanced calculus of practical considerations²².

Safety remains a paramount concern, especially for family travellers²³. Destination attractiveness is significantly impacted by:

- Perceived crime rates.
- Political stability.
- Health infrastructure.
- Overall security landscape.

Families, in particular, prioritise destinations that offer a sense of security and predictability, viewing safety as a critical component of travel planning.

In contrast to traditional package tourism, soft exploration represents a transformative approach to travel:

Key characteristics:

- Emphasis on flexibility and personalisation.²⁴

²⁰ Cohen, Erik. 'Towards a Sociology of International Tourism'. *Social Research*, vol. 39, no. 1, 1972, pp. 164–82. <https://www.jstor.org/stable/29056246>.

²¹ Leiper, Neil. 'Tourist Attraction Systems'. *Annals of Tourism Research*, vol. 17, no. 3, 1990, pp. 367–84. *ScienceDirect*, doi:10.1016/0160-7385(90)90004-B.

²² Moutinho, Luiz. 'Consumer Behaviour in Tourism'. *European Journal of Marketing*, vol. 21, no. 10, 1987, pp. 5–44. *Emerald*, doi:10.1108/EUM00000000004618.

²³ Baloglu, Seyhmus, and Ken McCleary. 'A Model of Destination Image Formation'. *Annals of Tourism Research*, vol. 26, no. 4, 1999, pp. 868–97. *ScienceDirect*, doi:10.1016/S0160-7385(99)00030-4.

²⁴ Pine, B. Joseph, and James H. Gilmore. 'Welcome to the Experience Economy'. *Harvard Business Review*, vol. 76, no. 4, 1998, pp. 97–105.

- Digital-enabled trip planning and co-creation.²⁵
- Focus on local cultural experiences.
- Participatory and eco-friendly adventure models.
- Prioritisation of authentic interactions.
- Motivated by experiential quality, sustainability, and personal well-being

Recent trends highlighted by Condé Nast Traveller suggest a growing market embrace of flexible packages that incorporate rich, experiential elements. Even traditionally price-conscious markets are demonstrating increased openness to these more dynamic travel models²⁶.

Product requirements

For the traditional package holiday market, core requirements include:

- Affordable, standardised accommodation with consistent service quality.
- Continued partnerships with charter airlines ensuring seasonal connectivity.
- Pre-packaged options that provide a worry-free holiday experience.

For the soft exploration / slow tourism segment, core requirements include:

- Options that allow travellers to tailor experiences (e.g. cultural tours, culinary classes, community-based tourism).
- Accommodation and activities that minimise environmental impact while promoting local culture.
- Platforms that facilitate self-booking, personalised recommendations, and real-time itinerary adjustments.
- Products that encourage longer stays and deeper immersion in the destination, such as wellness retreats or slow travel packages that focus on relaxation and self-care (e.g. sleep tourism trends).

Marketing approach

A multi-channel approach is essential to reach both traditional package holiday consumers and emerging soft exploration travellers. The key strategy of engaging with charter tour operators through whom destinations would generally reach the end consumer remains as these use their own marketing channels as well as selected earned, paid and shared travellers to reach the end consumer.

Trade Shows

- Travel trade fairs and workshops in main source markets (e.g. World Travel Market London (UK), ITB Berlin (Germany) with a focus on cost efficiency, reliable connectivity, and high occupancy rates.

Media

- Travel trade media publications to reach product managers at charter tour operators, e.g.:
 - Travel Weekly UK

²⁵ Neuhofer, Hendrik, Armin Buhalis, and Dimitrios Poullos. 'Conceptualising Technology Enhanced Destination Experiences'. *Journal of Destination Marketing & Management*, vol. 6, no. 3, 2017, pp. 146–55. *ScienceDirect*, doi:10.1016/j.jdmm.2015.12.001.

²⁶ Condé Nast Traveller, 'The Biggest Travel Trends to Expect in 2025', Condé Nast Traveller, January 2025. <https://www.cntraveler.com/story/the-biggest-travel-trends-to-expect-in-2025>

- Travel Weekly US
- Travel Trade Gazette UK
- FWW (Germany)
- TravMagazine (Netherlands and Belgium)
- Standby (Denmark)
- Joint marketing through mainstream publications such as the travel sections in major newspapers in key source markets.
- Direct advertising on platforms like TUI, Corendon and First Choice.

Tour operators

- **For package holidays:** Direct outreach to the product managers from such charter tour operators as TUI, Jet2Holidays, Dertour, Corendon, Sunweb, Rainbow Tours, Apollo, Soltour and Abreu.
- **For soft exploration:** Direct outreach to direct operators and soft exploration specialists, e.g.: Intrepid Travel, G Adventures, Tauck, Exodus and Peregrine Adventures) to offer customised packages.

Intrepid Explorers

Market segment description and profile

The landscape of global tourism is undergoing a profound transformation, with the intrepid explorer segment emerging as a powerful force that challenges traditional travel paradigms. Far from the cookie-cutter "sun, sea and sand" model, these travellers represent a sophisticated approach to global exploration that prioritises authenticity, personal growth, and meaningful cultural engagement²⁷.

The Intrepid Explorer segment defies simple categorisation, encompassing a diverse range of travellers united by a shared philosophy of travel as transformative experience.

Key demographic characteristics:

- **30-50 age group:** The primary segment, characterised by financial stability and a desire for meaningful, multi-generational experiences that go beyond conventional tourism.
- **Younger explorers (<30):** Drawn to physically demanding, adrenaline-fuelled adventures that challenge personal limits and offer intense, immersive experiences.
- **Seasoned travellers (>50):** Seeking a more balanced approach that combines moderate physical activity with deep cultural enrichment and intellectual stimulation.

. Their travel choices are driven by a profound desire to:

- Engage directly with local cultures in meaningful, non-superficial ways.
- Challenge personal boundaries and preconceived notions about global destinations.
- Prioritise experiential value over traditional luxury or comfort.
- Contribute positively to local communities and environmental sustainability.

Intrepid Explorers in The Gambia

²⁷ Pearce, Philip L. 'The Ulysses Factor: Evaluating Visitors in Tourist Settings'. *Annals of Tourism Research*, vol. 9, no. 3, 1982, pp. 305–31. *ScienceDirect*, doi:10.1016/0160-7385(82)80001-8.

The Gambia's rich cultural heritage, unique ecosystems—from inland reserves and mangroves to historical sites—and the strong community-based tourism initiatives align remarkably well with the expectations of intrepid explorers.

In addition to offering a concentrated experience of biological diversity allowing Intrepid Explorers to experience multiple environments without extensive travel, The Gambia's ecological richness provides abundant opportunities for natural immersion.

Cultural authenticity – a primary motivator for Intrepid Explorers – abounds in The Gambia, where travellers can engage directly with locals through immersive experiences. Further historical sites connected to the transatlantic slave trade provide opportunities for intellectual engagement and historical understanding that mature Intrepid Explorers often seek

Lastly, the River Gambia provides a natural corridor for exploration that perfectly suits the adventure-seeking Intrepid Explorer, allowing access to remote areas while experiencing the country's landscapes and cultures.

General travel behaviour

Digital technology has fundamentally transformed how Intrepid Explorers conceptualise, plan, and experience their journeys²⁸. Unlike traditional tourists with fixed itineraries, these travellers approach travel as a dynamic, co-created experience that can be modified in real-time.

Their digital ecosystem is comprehensive and sophisticated, involving:

- Extensive research across multiple platforms, including adventure travel blogs, social media channels like Instagram and YouTube.
- Real-time information gathering through user-generated content and authentic traveller reviews.
- Utilisation of mobile applications and online booking tools that offer unprecedented flexibility.
- Engagement with travel influencers who provide genuine, unfiltered insights into destinations.

The approach to travel itself is markedly different from conventional tourism. Intrepid explorers:

- Embrace uncertainty as an integral part of the travel experience.
- Demonstrate remarkable adaptability in changing travel plans.
- Prefer off-peak travel periods to experience destinations in their most authentic state.
- Seek out opportunities for genuine cultural immersion and personal transformation.

The segment exhibits a nuanced approach to adventure, ranging from intense physical challenges to more contemplative cultural explorations. This diversity is reflected in their adventure preferences:

- "Hard" adventures: High-intensity experiences like rock climbing, white-water rafting, and extreme sports that test physical and mental boundaries.

²⁸ Werthner, Hannes, and Christine Werthner. 'Mobile and Social Media in Tourism'. In *Information and Communication Technologies in Tourism 2015*. Edited by Iis Tussyadiah and Alan Zachery Morrison. Cham: Springer International Publishing, 2015, pp. 417–28.

- "Soft" adventures: Cultural walks, wildlife safaris, local culinary tours that offer deep cultural understanding and personal growth opportunities.

Ethical considerations are paramount. These travellers are not passive consumers but active participants in a broader conversation about sustainable and responsible tourism²⁹. Their choices are driven by:

- A commitment to minimising environmental impact.
- Desire to generate positive socio-economic benefits for host communities.
- Support for local economies through conscious travel choices.
- Preference for operators demonstrating genuine commitment to sustainability.

Product requirements

Tourism products for the Intrepid Explorer must be designed with flexibility, authenticity, and sustainability in mind. Itineraries should be customisable, i.e., products should offer modular options that allow travellers to choose or modify components such as accommodation, local tours, adventure activities, and cultural experiences.³⁰

The segment favours eco-lodges, homestays, and “glamping” options that combine local design and sustainability with basic comforts. These forms of accommodation allow travellers to immerse themselves in local life while minimising their ecological footprint.³¹

Robust, locally sourced guide services are essential³². Travellers demand guides who are knowledgeable about local culture, geography, and history. Comprehensive safety protocols—integrated with local community initiatives—further enhance confidence among explorers venturing into remote or less-developed areas.

There is a growing need for experiences that prioritise local community involvement and environmental stewardship³³. This includes cultural workshops, eco-friendly excursions, and community-led tours that ensure a higher proportion of revenue remains in the local economy, fostering long-term sustainability.

Marketing approach

This segment's dual desire for curated experiences with elements of mild adventure requires strategic marketing across various platforms.

Trade Shows

- Targeted travel trade events and related segment-specialised events in main source markets, e.g. Experience Africa (UK), Adventure Travel Trade Association events.

²⁹ Scheyvens, Regina. 'Tourism and Poverty Reduction: Issues for Small Island States'. *Progress in Development Studies*, vol. 2, no. 4, 2002, pp. 325–49. *SAGE Journals*, doi:10.1191/1464993402ps045ra.

³⁰ Neuhofer, Hendrik, and Armin Buhalis. 'The Smartification of Tourism Destinations: Ecosystem-Based Destination Management and Open Innovation'. *Information Technology & Tourism*, vol. 20, no. 3–4, 2019, pp. 249–70. *SpringerLink*, doi:10.1007/s40558-019-00154-3.

³¹ Font, Xavier, and , and Kelly Brereton. 'Progress in Sustainable Accommodation'. *Annals of Tourism Research*, vol. 41, 2013, pp. 17–41. *ScienceDirect*, doi:10.1016/j.annals.2012.11.002.

³² Ap, Jolanda P., and Alan M. Day. 'Community-Based Tourism: An Overview'. *Background paper for the Expert Workshop on Community-based Tourism, Townsville, Australia, 25-27 November*. 1998.

³³ Honey, Martha. *Ecotourism and Sustainable Development: Who Owns Paradise?* Island Press, 2008.

Media

- Mainstream media, including travel sections with “intrepid explorer” appeal provide broad reach, but their travel sections often feature content that resonates with independent, adventurous and culturally curious travellers e.g., The Guardian, New York Times, Sunday Times, BBC Travel, CNN Travel.
- Mainstream print and digital magazines that include adventure and cultural travel angles, including National Geographic Traveller, AFAR, Travel Africa, Wanderlust.
- Niche media titles that are highly targeted for Intrepid Explorers, including Outside Magazine, Sidetracked Magazine.
- Travel blogs with a large following, including Nomadic Matt, Adventurous Kate.

Online forums

- General traveller online forums such as TripAdvisor, Lonely Planet’s Thorn Tree Forum and Reddit.
- Social media groups, such as Travel Africa, Travel to Africa, West Africa Travellers (on Facebook).

Tour operators

- International adventure tour operators that often offer small group and tailor-made intrepid-style tours, including Intrepid Travel, G Adventures, Exodus Travels, Explore Worldwide, etc.
- Specialist Africa adventure tour operators, including Akwaba Africa, Africa Travel Centre, Africa Odyssey, Take me to Africa, Audley Travel.

Ecotourism: Birding, Photography, Community-based / Heritage Touring

Market segment description and profile

Eco-tourism represents a reimagining of travel as a meaningful, responsible interaction between humans, local communities, and natural environments³⁴. It embodies a holistic approach to exploration that prioritises conservation, education, and sustainable development³⁵.

At its core, eco-tourism focuses on responsible journeys to natural areas, with a dual commitment to environmental conservation and the genuine improvement of local communities' well-being³⁶. Unlike conventional tourism, eco-tourism is characterised by its deep intentionality—every aspect of the travel experience is carefully considered to minimise negative impacts and maximise positive outcomes³⁷.

Eco-tourism is a multifaceted approach to travel that manifests in diverse forms:

1. **Nature-Based Eco-Tourism:** Offering direct, immersive interactions with natural environments, this category encompasses activities like wildlife viewing, birdwatching, and nature photography. It provides travellers with intimate encounters with ecological

³⁴ Boo, Elizabeth. *Ecotourism: The Potentials and Pitfalls*. Vol. 2. World Wildlife Fund, 1990.

³⁵ Honey, Martha. *Ecotourism and Sustainable Development: Who Owns Paradise?* Island Press, 2008.

³⁶ Ceballos-Lascuráin, Hector. ‘The Future of Ecotourism’. *Mexico Journal*, vol. 1, no. 1, 1993, pp. 13–14

³⁷ Weaver, David B., and Megan Epler Wood. ‘Ecotourism in the 21st Century’. *Journal of Ecotourism*, vol. 1, no. 2–3, 2002, pp. 116–32. *Taylor and Francis Online*, doi:10.1080/14724040208668112.

systems, fostering deeper understanding and appreciation of natural world complexities³⁸.

2. **Cultural Eco-Tourism:** This approach prioritises deep cultural engagement, allowing travellers to experience and learn about local traditions, customs, and ways of life. It goes beyond superficial interactions, creating meaningful connections between visitors and host communities³⁹.
3. **Adventure Eco-Tourism:** Combining physical challenge with sustainable practices, this type of eco-tourism integrates adventure activities like hiking, kayaking, and wildlife safaris with a fundamental commitment to environmental responsibility⁴⁰.
4. **Voluntourism:** Perhaps the most directly impactful form of eco-tourism, voluntourism involves travellers actively participating in conservation projects, community development initiatives, and other meaningful social impact activities.⁴¹

Eco-tourists are active participants in a global conversation about sustainability, environmental protection, and cultural understanding. Their approach to travel is marked by⁴²:

- A profound environmental consciousness that goes beyond mere awareness.
- Willingness to engage deeply with local cultures and ecosystems.
- Commitment to making tangible, positive contributions to destination communities.
- Readiness to pay a premium for authentic, meaningful experiences.

The global eco-tourism market has experienced remarkable growth, fuelled by several factors:

- Increasing global environmental consciousness, particularly around climate change.
- A generational shift towards more meaningful, purpose-driven travel experiences⁴³.
- Growing governmental support for sustainable tourism initiatives⁴⁴.
- Rising disposable incomes and expanded global travel opportunities.

The digital revolution has also fundamentally reshaped how eco-tourists research, select, and engage with destinations. Online platforms and social media have become critical tools for destination discovery, sharing authentic travel experiences, connecting with like-minded travellers and accessing detailed information about sustainable travel options.

³⁸ Valentine, Peter S. 'Nature-Based Tourism'. In *Tourism Geographies: Critical Understandings*. Edited by Terry G. Jordan and William P. Stewart. Routledge, 2017, pp. 145-162.

³⁹ Smith, Melanie K. 'Issues in Cultural Tourism Studies'. *Tourism Recreation Research*, vol. 32, no. 3, 2007, pp. 269–82. *Taylor and Francis Online*, doi:10.1080/02508281.2007.11081281.

⁴⁰ Sung, Hyun-Ju, Sidney J. Suh, and Ju-Yeon Lee. 'The Effects of Motivation and Attitude on Environmentally Responsible Behaviors of Adventure Tourists'. *Sustainability*, vol. 11, no. 19, 2019, p. 5387. *MDPI*, doi:10.3390/su11195387.

⁴¹ Raymond, Emily M., and Stephen R. Wearing. 'The Problematics of Definition in Voluntourism: The Case of Projects Abroad'. *Tourism Management*, vol. 29, no. 3, 2008, pp. 548–58. *ScienceDirect*, doi:10.1016/j.tourman.2007.06.007.

⁴² Wight, Pamela A. 'Ecotourism: Ethics or Eco-Sell?'. *Journal of Sustainable Tourism*, vol. 1, no. 1, 1993, pp. 6–10. *Taylor and Francis Online*, doi:10.1080/09669589309450049.

⁴³ Duffy, Abigail M., and Xinran Y. Lehto. 'Millennial Generation and Tourism: Motivations, Attributes, and Expectations'. *Tourism Review*, vol. 66, no. 4, 2011, pp. 52-71. *Emerald*, doi:10.1108/16605371111175822.

⁴⁴ United Nations Environment Programme (UNEP) & World Tourism Organization (UNWTO). *Towards a Green Economy: Pathways to Sustainable Development: A Synthesis for Policy Makers*. UNEP, 2011.

Ecotourists in The Gambia

The Gambia presents an extraordinary eco-tourism destination, distinguished by a remarkable convergence of ecological diversity, cultural richness, and community-driven conservation opportunities.

The country's ecological landscape, from riverine environments and inland reserves to coastal zones is also remarkably complex and inviting for eco-tourists. Beyond its renowned avian diversity—with over 600 bird species making it a crucial hub along seasonal migratory pathways—The Gambia offers a multifaceted ecosystem that spans several critical habitats.

Further, community-based conservation represents a particularly compelling aspect of The Gambia's eco-tourism potential, while the country's cultural landscape adds significant depth to its eco-tourism offerings.

General travel behaviour

Eco-tourists' travel behaviour is characterised by a philosophical commitment that embodies a holistic worldview that connects personal experience with global environmental and social responsibility⁴⁵:

- Deep, sensory engagement with diverse ecosystems.
- Scientific and emotional curiosity about natural systems.
- A commitment to understanding ecological interdependencies.
- Willingness to experience environments in their most authentic states.
- Openness to challenging physical and emotional experiences that foster personal growth and environmental understanding.

Sustainability is a fundamental philosophical principle that guides every aspect of their travel:

- Meticulous research into the environmental credentials of destinations and service providers.
- Willingness to modify travel plans to align with sustainable practices.
- Active participation in conservation efforts.
- Financial support for local environmental initiatives.
- Critical assessment of tourism's broader ecological footprint.

Unlike traditional tourists seeking superficial experiences, eco-tourists pursue profound, meaningful interactions⁴⁶:

- Rejection of commodified, sanitised cultural experiences.
- Deep respect for local knowledge and traditional practices.
- Genuine desire to understand complex social and ecological systems.
- Commitment to reciprocal cultural exchange.

⁴⁵ Ballantyne, Roy, and Jan Packer. 'Visitors' Emotions at Wildlife Attractions: Implications for Management and Interpretation'. *Tourism Management*, vol. 17, no. 8, 1996, pp. 587–96. *ScienceDirect*, doi:10.1016/S0261-5177(96)00066-X.

⁴⁶ Moscardo, Gianna M. 'Sustainable Tourism Principles and Practice'. *Tourism and Hospitality Research*, vol. 8, no. 3, 2008, pp. 197–209. *SAGE Journals*, doi:10.1057/thr.2008.17.

- Willingness to challenge personal preconceptions through direct engagement.

The financial dimension of eco-tourism reflects a sophisticated understanding of travel's economic potential⁴⁷:

- Willingness to pay premium prices for genuinely sustainable experiences.
- Direct financial support for local conservation efforts.
- Investment in high-quality, locally produced goods and services.
- Understanding of travel as a form of economic and environmental investment.
- Rejection of cost-cutting measures that compromise environmental or social integrity.

Eco-tourists also demonstrate remarkable flexibility and resilience⁴⁸:

- Comfort with unpredictable, non-standardised travel experiences.
- Willingness to adapt to local conditions and community needs.
- Capacity to find value in experiences that challenge comfort zones.
- Openness to learning and personal growth.
- Rejection of manufactured, homogenised tourist experiences.

Product requirements

Accommodation considerations:

- Environmentally sustainable design and operations.
- Integration of renewable energy technologies.
- Water and energy conservation measures.
- Minimal environmental footprint.

Activity and experience design:

- Low-impact recreational activities.
- Opportunities for environmental and cultural learning.
- Direct engagement with local communities.
- Small group configurations to minimise environmental impact.

Within the broader context of eco-tourism, several niche sub segments emerge – for the purposes of this market segmentation exercise, we will focus on *birding*, *photography* and *community-based tourism*.

⁴⁷ Stem, Chelsea J., Michael J. Lassoie, Alison P. McLaren, and Andrew J. Brush. 'Community Participation in Ecotourism Benefits and Pitfalls'. *Journal of Ecotourism*, vol. 2, no. 3, 2003, pp. 242–64. *Taylor and Francis Online*, doi:10.1080/14724040308668153.

⁴⁸ Cohen, Erik, and Susan Cohen. 'Contemporary Tourism—Trends and Challenges: Commodification and Authenticity in Tourism'. *International Journal of Culture, Tourism and Hospitality Research*, vol. 1, no. 3, 2007, pp. 242–54. *Emerald*, doi:10.1108/17506180710821871.

Birding

Once a specialised activity for “hardcore” twitchers, birdwatching has become a mainstream pursuit among well-educated, affluent travellers⁴⁹. This transformation stems from a confluence of factors, including heightened environmental awareness and growing interest in sustainable travel experiences, aligning with the broader trend of ecotourism.

The appeal of birdwatching continues to grow across multiple markets, with significant participation emerging in Europe—particularly the United Kingdom, Netherlands, and Germany—establishing these nations as key source regions for avitourism.

In the United States alone, approximately 14.82 million individuals engaged in birdwatching activities in 2021, underscoring the substantial market potential⁵⁰.

Within the avitourism sector, participants can be understood through three distinct yet overlapping categories⁵¹.

- **Committed twitchers:** These individuals maintain a life list of bird species they have observed and prioritise adding new species to this list during their travels.
- **Enthusiasts:** Broadly interested in natural history, these travellers appreciate all aspects of flora and fauna, not solely birds.
- **Casual birders:** They enjoy the experience of discovering and interacting with nature through birdwatching but do not focus on specific species.

The global distribution of avitourism source markets reveals significant concentrations in several regions:

- The United Kingdom hosts the Royal Society for the Protection of Birds with its impressive membership exceeding one million individuals, primarily composed of committed twitchers and enthusiasts who regularly participate in both domestic and international birding expeditions.
- Similarly, the Netherlands demonstrates robust interest through the Dutch Society for the Protection of Birds' 141,000 members.
- North American markets—both the United States and Canada—contribute substantial numbers of international birdwatchers seeking novel experiences beyond their home territories. Additional key markets include Scandinavia, with its strong traditional connection to outdoor
- activities and environmental consciousness, and South Africa, which serves as both a destination for international birders and a source of avitourists travelling overseas.

Demographic analysis reveals nuanced patterns across generational segments within the birding community:

- Millennials (born 1981-1996) approach avitourism through a technological lens, leveraging social media and digital platforms not only for research but also for

⁴⁹ Kerlinger, Paul, and Erica N. Meehan. 'Economics and Demographics of Birdwatching Constituencies'. *The Condor*, vol. 114, no. 3, 2012, pp. 613–25. *JSTOR*, <https://www.jstor.org/stable/41677119>.

⁵⁰ American Sportfishing Association. *2022 Special Report on Fishing and Birding*. American Sportfishing Association, 2022. [Report]. <https://asafishing.org/data-research/fishing-and-boating-participation/>

⁵¹ Loomis, John B., and Donald J. White. 'Economic Benefits of Birdwatching in the United States'. *Human Dimensions of Wildlife*, vol. 10, no. 4, 2005, pp. 229–49. *Taylor and Francis Online*, doi:10.1080/10871200500229136.

documenting and sharing their experiences, often seeking destinations that offer both authentic birding opportunities and shareable moments.

- Generation X participants (born 1965-1980) typically navigate birdwatching within the constraints of ongoing work and family responsibilities, preferring experiences that balance educational components with efficient use of limited leisure time and often selecting destinations that accommodate multi-generational participation.
- Baby Boomers (born 1946-1964) frequently engage with birdwatching as both a contemplative individual pursuit and a social activity, valuing the combination of natural immersion with comfortable accommodation options that support longer stays in prime birding locations.

Across all these segments, birders typically demonstrate above-average income and education levels, making them particularly valuable within the tourism ecosystem.

The destination preferences and behavioural patterns of avitourists reflect sophisticated evaluation criteria beyond simple sightseeing considerations⁵². They prioritise locations offering exceptional biodiversity with diverse avian species, high-quality natural habitats with minimal disturbance, and infrastructure that facilitates observation without compromising the ecological integrity of the environment.

Access to knowledgeable local expertise significantly influences destination selection, as expert guides enhance the probability of locating elusive species while providing contextual understanding of regional ecosystems⁵³.

Unlike conventional tourists, avitourists meticulously time their travel to coincide with peak bird activity—such as breeding seasons, migrations or dry seasons when birds congregate around water—often resulting in visitation during a destination's traditional off-season periods, thereby contributing to year-round tourism sustainability⁵⁴.

The economic impact of avitourism manifests through distinctive spending patterns that differ markedly from mass tourism⁵⁵. Substantial portions of expenditure flow toward specialised services including expert guides, customised transportation to remote habitats, and equipment rental.

These birders direct significant resources toward conservation mechanisms through entrance fees, permits for protected areas, and voluntary contributions to wildlife sanctuaries and habitat restoration initiatives.

Their accommodation preferences span a spectrum from rustic ecolodges proximally located to prime birding sites to premium facilities that combine comfort with exclusive access to private reserves.

Rather than dispersing limited resources across numerous locations, avitourists typically concentrate their spending in fewer destinations for extended periods, allowing deeper

⁵² Buckley, Ralf C. 'Tourism Ecology and Ecology Tourism'. *Biodiversity & Conservation*, vol. 13, no. 13, 2004, pp. 2593–615. [SpringerLink](https://doi.org/10.1023/B:BIOC.0000047914.87933.f7), doi:10.1023/B:BIOC.0000047914.87933.f7.

⁵³ Jobbins, Gregory, and Jim Safford. *Ecotourism and Nature-Based Tourism: Opportunities and Challenges*. CABI, 2015.

⁵⁴ Turpie, Jane K., and R. Warwick Fraser. 'Avitourism in South Africa: Profile and Behaviour of Birders'. *Tourism and Hospitality Planning & Development*, vol. 5, no. 2, 2008, pp. 85–100. *Taylor and Francis Online*, doi:10.1080/14797190802114106.

⁵⁵ Sekhar, Nagothu U., and Martin Westerbergh. 'The Economic Contribution of Ecotourism: A Case Study of Birdwatching in Bharatpur, India'. *Environmental Conservation*, vol. 33, no. 04, 2006, pp. 334–44. *Cambridge Core*, doi:10.1017/S037689290600395X.

exploration and increasing the likelihood of satisfying wildlife encounters while providing sustained economic benefits to local communities.

This spending pattern, combined with their willingness to visit remote or less-developed regions specifically for birding opportunities, channels tourism revenue into areas that might otherwise remain outside conventional tourism circuits, creating economic incentives for habitat preservation and sustainable development in biodiversity-rich regions.

Product requirements

Accommodation for birding tourists must balance comfort with proximity to bird-rich habitats. Many avitourists prefer lodgings as close as possible to prime observation areas—whether ecolodges bordering rainforests, guesthouses near national parks, or homestays in rural villages⁵⁶. Their preferences reflect specialised needs:

- Early breakfast or flexible mealtimes to accommodate dawn bird-watching expeditions.
- Packed lunch options for full-day field outings.
- Reliable amenities for charging camera equipment and optical devices.
- Secure storage for expensive birding equipment.
- Properties featuring on-site birding opportunities through feeders, observation decks, and private trails.

While dedicated twitchers may tolerate rustic conditions to access exceptional birding locations, the growing mainstream market appreciates clean, comfortable accommodation after long days in the field. This has led to the emergence of specialised ecolodges in popular birding destinations that combine nature immersion with appropriate comfort levels.

Quality infrastructure significantly enhances the birding experience and influences destination selection. Birders value:

- Well-maintained trail networks that provide access to diverse habitats.
- Boardwalks through sensitive wetland environments.
- Strategic observation hides and towers for unobtrusive wildlife viewing.
- Interpretive signage providing context about local avian species.
- Reliable transport routes to reach remote reserves and protected areas.

Safety considerations play a crucial role as birders frequently venture into less-travelled areas. Destinations offering secure travel routes, dependable local transport, and safe accommodation arrangements gain competitive advantage. Developing countries seeking to attract the avitourism market should prioritise improving accessibility to key bird sites while ensuring at least minimal visitor facilities are available.

The presence of skilled bird guides⁵⁷ represents perhaps the most critical service requirement in avitourism. Unlike general tourists, birders rely heavily on expert guides who:

- Possess comprehensive knowledge of local species by both sight and sound.

⁵⁶ CBI Ministry of Foreign Affairs. *Tips for birdwatching tourism - for tourism entrepreneurs in developing countries*. CBI, 2022. [Online]. Available: <https://www.cbi.eu/market-information/tourism/birdwatching-tourism/tips> [Accessed: 17 October 2024].

⁵⁷ Wearing, Stephen, and John Neil. *Ecotourism: Impacts, Potentials and Possibilities*. 2nd ed., Butterworth-Heinemann, 2009.

- Can tailor excursions to match clients' experience levels.
- Understand seasonal patterns and specific habitat conditions.
- Connect visitors with rare or difficult-to-locate species.
- Provide ecological context that enriches the overall experience.

This reliance on specialised knowledge creates significant opportunities for local employment and skills development in birding destinations.

Avitourists typically demonstrate strong environmental consciousness, appreciating visible conservation efforts at their destinations. European birders particularly value knowing that their expenditure contributes positively to habitat protection and local community development. This creates a virtuous cycle where tourism revenue provides economic incentives for continued conservation.

Sustainable habitat management remains fundamental to avitourism's long-term viability. This includes:

- Maintaining wetlands, forests and reserves to ensure birds continue to thrive.
- Using visitor funds for habitat restoration initiatives.
- Developing low-impact facilities with minimal ecological footprints.
- Employing sustainable practices such as solar power and waste reduction.

Birders frequently enquire about a lodge's environmental practices or a tour company's conservation credentials when selecting providers. With climate change and habitat loss frequently concerning this market segment, operators who actively engage in conservation often gain competitive advantage. Marketing strategies that highlight sustainability initiatives can therefore serve as effective differentiators when targeting the avitourism market⁵⁸.

Marketing approach

Avitourists often rely on various channels for information and planning:

- **Peer recommendations:** Many birders are part of local clubs or organisations where they share experiences and recommendations.
- **Online resources:** Birding books, magazines, and dedicated websites are essential tools for planning trips. Avitourists are comfortable using the internet for research and booking.
- **Specialist Tour Operators:** There is a strong preference among international avitourists for specialised birding tour operators rather than general travel agencies. See list below.

Birding shows and fairs

- **Birdfair:** Europe's largest annual bird watching fair, held annually in August, in Rutland.
- **The African Birding Expo:** A meeting point in Uganda for a spectrum of the bird watching community within Africa.

Online forums, associations and publications

- Online forums such as BirdForum.net, eBird and Birding Pal.

⁵⁸ Font, Xavier, and , and Kelly Brereton. 'Sustainable Tourism Marketing'. In *Sustainable Tourism: Principles, Practices and Performance*. Edited by Alan Fyall, Metin Kozak, and Leo Leask. CABI, 2021, pp. 451-466.

- Associations such as the African Birdclub in the UK, the American Birding Association and Association of German Avifaunists.
- A range of digital and print magazines and information sites exist, such as Bird Watching Magazine, Birdwatching Daily, BirdGuides.com, ABA Birding Association, Audabon and African Birdlife Magazine.

Tour operators

- **Birding Tours:** German tour operator offering a variety of birding packages.
- **Bird Holidays Limited:** UK-based tour operator specialising in birdwatching holidays, birding tours, wildlife safaris and wildlife cruises.
- **Birdfinders:** Worldwide birdwatching holidays to the best birding destinations on every continent.
- **Birding Africa:** Recommended as one of the top 5 most recommended bird tour companies in the world.
- **BirdQuest Tours:** Easy-going bird and wildlife adventures.
- **Avian Adventures:** One of the leading UK-based bird watching tour companies.
- **Eagle Eye Tours:** US-based offering high-quality tours to worldwide destinations.
- **Sunrise Birding:** US-based small group bird watching tours and wildlife safaris worldwide.
- **Wings:** US-based offering birding tours worldwide.
- **Greentours:** Provides Wildlife, Alpine Flower, Mammal Tours, Bird Watching and much more throughout the UK, Europe, Africa, Americas, Asia, Australia.
- **Ornitholidays:** Touted as the first birdwatching tour company in the world.
- **Rockjumper Birding Tours:** One of the world's longest established and most highly regarded birding tour companies.

Photographic Tourism

Driven by the digital revolution, increased smartphone usage, and the pervasive influence of social media platforms, photographic tourism has emerged as a distinct market segment attracting travellers eager to capture unique landscapes, wildlife and cultural scenes around the world⁵⁹.

For the purposes of this analysis, photographic tourism is defined as a specialised form of travel where individuals journey with the primary purpose of capturing images and documenting experiences through photography⁶⁰. This niche extends beyond casual holiday snapshots to encompass deliberate travel decisions motivated by photographic opportunities, and encompasses a rich variety of specialisations that attract distinct sub-segments of enthusiasts:

- **Wildlife photography:** Appealing to those passionate about documenting animals in their natural habitats, focusing on capturing behaviour and unique characteristics.
- **Astrophotography:** A growing specialisation where practitioners seek remote locations with minimal light pollution and clear skies.
- **Street photography:** Attracting those interested in documenting everyday life and human interactions in public spaces.

⁵⁹ Urry, John, and Jonas Larsen. *The Tourist Gaze 3.0*. 3rd ed., SAGE, 2011.

⁶⁰ Frohlick, Susan. 'The Rise of Special Interest Tourism'. *Tourism Recreation Research*, vol. 24, no. 2, 1999, pp. 69–72. *Taylor and Francis Online*, doi:10.1080/02508281.1999.11014872.

- **Cultural event photography:** Capturing festivals, ceremonies and traditions, with photographers timing their visits to coincide with significant cultural celebrations.

Photographic tourists demonstrate distinctive motivational patterns that influence their travel decisions and on-site behaviour:

- The desire to capture beauty represents a fundamental driver, with photographers seeking to preserve memories and experiences through their unique visual perspective⁶¹.
- Learning and skill development motivate many in this segment, who view travel as an opportunity to improve their photographic technique.
- Some photographers exhibit what researchers term the "shutter-urge"—a compelling desire to document every moment and detail of their travels, resulting in high-volume image capture.
- Storytelling emerges as a crucial aspect of the photographic tourism experience, with many enthusiasts using their images to construct narratives about their travels.

While photographic tourism spans all age groups, Millennials and Generation Z travellers demonstrate particularly high engagement with this activity. These younger segments tend to capture more images daily during their travels and share them extensively across social media platforms⁶².

This pattern highlights the symbiotic relationship between photographic tourism and social media, with platforms like Instagram and Facebook serving dual functions: they provide inspiration for destination selection while also offering venues for sharing experiences and building personal brands through photography.

Photographic tourists select destinations based on specific criteria that support their creative objectives:

- Destinations offering diverse and visually distinctive landscapes attract landscape photographers seeking variety within a single trip⁶³.
- Regions known for wildlife diversity and accessibility draw those specialising in animal photography.
- Locations featuring exceptional light qualities—whether the "golden hour" of sunset or the clear night skies valued by astrophotographers—hold appeal.
- Areas blending natural beauty with authentic cultural experiences satisfy those seeking narrative depth in their imagery.

The spending habits of photographic tourists reflect their specialised interests and priorities:

- Significant investment in camera equipment, lenses and accessories often precedes or accompanies travel.
- Expenditure on photography-specific experiences such as workshops, guided tours with photography experts, and permits for special access to photographic locations.

⁶¹ Dann, Graham M.S. 'Anomie, Ego-Enhancement and Tourism'. *Annals of Tourism Research*, vol. 4, no. 4, 1977, pp. 184–94. *ScienceDirect*, doi:10.1016/0160-7385(77)80002-8.

⁶² Gretzel, Ulrike, Zhendong Xiang, and Philip L. Pearce. 'Social Media in Travel and Tourism'. *Information and Communication Technologies in Tourism 2011*. Edited by Jafar Jafari and Honggen Xiao. Vienna: Springer, 2011, pp. 13-25.

⁶³ Hall, C. Michael, and Stephen J. Page. *Tourism, Parks, Recreation and Sport*. Routledge, 2014.

- Willingness to pay premium prices for accommodations offering superior photographic opportunities, such as rooms with panoramic views or properties situated in prime locations for sunrise/sunset photography.
- Selective luxury spending, with some photographers opting for budget accommodation to maximise financial resources available for photography-related activities and experiences.

This segment demonstrates flexibility in travel timing, often planning visits around optimal photographic conditions rather than conventional peak seasons, contributing to destination sustainability through more distributed year-round visitation patterns.

Marketing approach

Events and shows

- **The Photography & Video Show:** An annual event in the UK that brings together photography enthusiasts and professionals for exhibitions, workshops, and seminars.
- **Shutterfest:** An annual photography event in the USA that brings together thousands of professional photographers, photo enthusiasts, and industry experts from around the world.

Online forums, associations and publications

- The Society of International Travel and Tourism Photographers (SITTP) offers online photographic communities, allowing members to engage with other travel and tourism photographers through vibrant forums.
- Online communities such as Photo.net, Fstoppers Travel Photography Group, The Travel Photography Club and Travellerspoint offer dedicated spaces where members can discuss travel photography, share experiences, and seek advice.
- Publications such as JRN Travel Magazine, In The Frame, Travel Photography Magazine and IGNANT provide inspiration for travellers seeking destinations with photographic potential

Tour operators

- **Exodus Travels:** Offers global trips with a focus on themed adventures, including photography tours.
- **Aperture Tours:** Specialises in private photo tours with professional photographers, catering to all skill levels, across some of the world's most photogenic cities.
- **Photography Travel Tours:** Led by award-winning professionals, these tours offer immersive experiences in various European destinations, designed for passionate photographers.
- **Jim Cline Photo Tours:** Provides small group photography tours aimed at capturing unique and engaging locations at optimal times for photography.
- **ORYX Photo Tours:** Offers dedicated photography tours focusing on wildlife, culture, and landscapes across over 30 global destinations.
- **Pete Oxford Expeditions:** Co-founded by renowned conservation photographer Pete Oxford, this operator leads photographic tours with a focus on responsible travel.

Community-based Tourism

Community-based tourism (CBT) represents a rapidly evolving segment within the global tourism industry, attracting travellers seeking authentic, immersive experiences that support local communities and preserve cultural heritage. This market has gained significant momentum as tourists increasingly seek meaningful connections with destinations beyond traditional sightseeing.

Community-based tourism involves local communities in the planning, development and management of tourism activities. It aims to empower communities economically and socially while preserving cultural heritage and promoting sustainable development. CBT offers tourists genuine insights into local lives and ensures that travel experiences have a positive impact on local people.

Cultural tourism, which frequently overlaps with CBT, constitutes the largest and fastest-growing global tourism market, with at least 40% of tourists worldwide considered cultural tourists. These travellers are drawn to intangible factors such as history, traditions and contemporary culture, often seeking deep cultural experiences and connections with local communities⁶⁴.

The appeal of community-based tourism stems from two primary motivations:

- **Authenticity:** Travellers increasingly desire genuine cultural immersion rather than staged tourist experiences. An overwhelming 81% of global tourists express a desire to immerse themselves in local culture⁶⁵.
- **Ethical consumption:** The same percentage (81%) want their spending to directly benefit local people. This 'feel-good factor' of making a positive difference to local lives drives willingness to pay premium prices for experiences that demonstrably contribute to community welfare⁶⁶.

CBT travellers typically stay longer than regular tourists and prefer to venture beyond high-tourist density areas. They seek immersive activities that foster meaningful connections with local communities, often travelling by air to reach their destinations. The experience of cultural exchange and learning about different ways of life represents a central component of their travel motivation⁶⁷.

The CBI (Centre for the Promotion of Imports from developing countries) identifies three key demographic segments within the community-based tourism market⁶⁸:

- **Baby Boomers** (born 1945-1965): Representing the largest target group for CBT, this segment seeks 'trip of a lifetime' experiences and demonstrates considerable spending power. They are well-educated, travel frequently, maintain substantial travel budgets and often desire a blend of authenticity with comfort. Typically travelling as couples or in small groups, they value meaningful interactions with local communities alongside reliable amenities.

⁶⁴ CBI, *Cultural Tourism Market Potential* (Centre for the Promotion of Imports from developing countries, 2023) <https://www.cbi.eu/market-information/tourism/cultural-tourism/market-potential>

⁶⁵ American Express Travel, *Global Travel Trends* (2022), cited in CBI, *Community-based Tourism Market Potential* (2023).

⁶⁶ CBI, *European Market Potential for Community-Based Tourism* (Centre for the Promotion of Imports from developing countries, 2023) <https://www.cbi.eu/market-information/tourism/community-based-tourism/market-potential>

⁶⁷ DataBridge Market Research, *Global Cultural Tourism Market Report* (2023) <https://www.databridgemarketresearch.com/reports/global-cultural-tourism-market>

⁶⁸ CBI, *Community-based Tourism Market Potential* (Centre for the Promotion of Imports from developing countries, 2023) <https://www.cbi.eu/market-information/tourism/community-based-tourism/market-potential>

- **Generation X** (born 1965-1980): While sharing the desire for authentic experiences, this group tends to be more price conscious. Their primary motivation centres on cultural understanding and reciprocity—seeing how others live and giving something back. Generally well-educated and well-travelled, their full-time employment constraints mean they have less time available than Baby Boomers. They predominantly travel as couples or families, seeking experiences that accommodate multiple interests.
- **Millennials** (born 1980-1995): This segment approaches CBT with objectives of personal development, learning and supporting local communities. They value experiences that challenge perspectives and provide opportunities for growth. While also well-educated, many are students or early-career professionals with more limited budgets. They typically travel solo or in groups, often seeking longer-term immersive experiences despite financial constraints.

Community-based tourism is undergoing a significant transformation from niche to mainstream status. Industry reports indicate that responsible travel is rapidly evolving from a trend into an industry standard⁶⁹, with 76% of global travellers expressing intentions to travel more sustainably in the coming year⁷⁰. Many demonstrate willingness to pay premium prices for certified sustainable options.

The post-pandemic tourism landscape has accelerated this transition, with tourists increasingly seeking authentic, meaningful trips that positively impact host communities rather than mass-produced tours. This shift reflects evolving ethical travel values, with visitors placing heightened importance on preserving cultural heritage and ensuring equitable distribution of tourism benefits⁷¹.

The core demand drivers for CBT—authenticity, sustainability and community empowerment—have become central considerations in travel decision-making. Experiences such as homestays, participation in local festivals and traditional craft workshops that foster meaningful connections have moved from specialist interest to mainstream appeal, reshaping tourism with a focus on people and place rather than consumption alone.

Marketing approach

Shows and events

- **GSTC2025 Global Conference:** Held in Fiji, this conference by the Global Sustainable Tourism Council focuses on sustainable tourism practices, including community-based initiatives.
- **Cultural Sustainable Tourism (CST) - 7th Edition:** Explores the intersection of cultural tourism and sustainability, emphasising benefits for cities, residents, and tourists across generations.
- **International Conference on Cultural and Heritage Tourism (ICCHT):** Held in Chicago, USA, this conference delves into cultural and heritage tourism topics.

⁶⁹ Allied Market Research, *Community Based Tourism Market* (2023) <https://www.alliedmarketresearch.com/community-based-tourism-market-A223024>

⁷⁰ World Economic Forum, *Sustainable Travel Report* (2023), based on Booking.com survey data.

⁸ OECD, *Tourism Trends and Policies 2024* (2024) https://www.oecd.org/content/dam/oecd/en/publications/reports/2024/07/oecd-tourism-trends-and-policies-2024_17ff33a3/80885d8b-en.pdf

⁷¹ Allied Market Research, *Community-based Tourism Market Press Release* (2023) <https://www.alliedmarketresearch.com/press-release/community-based-tourism-market.html>

Online forums, associations and publications

- **World Tourism Association for Culture and Heritage (WTACH):** A non-profit organisation dedicated to ensuring that the unique attributes, history, and cultural values of the world's communities are celebrated and preserved for future generations.
- Online communities such as the Good Tourism Institute Community, Visit Communities, the Culture Trip and general travel communities, such as Travellerspoint Forum.
- Publications such as The Culture-ist, Outlook Travel, Wanderlust Travel Magazine, Gilgamesh, Condé Nast Traveller, Smithsonian Magazine – Travel Section, Travel Africa, Nomad Africa and Travel Essence.

Tour operators

- **G Adventures:** A small-group adventure travel company that focuses on sustainable and immersive experiences, connecting travellers with local communities worldwide.
- **Wild Frontiers:** A boutique travel company specialising in off-the-beaten-path adventures, offering culturally rich and responsible travel experiences in remote destinations.
- **Intrepid Travel:** A global adventure travel company committed to responsible tourism, providing authentic small-group tours that prioritise local interactions and sustainability.
- **Responsible Travel:** A platform that curates eco-conscious holidays, partnering with ethical tour operators to promote community-based and environmentally friendly tourism.
- **Better Places:** A sustainable travel company offering tailor-made trips that prioritise local communities, fair wages, and environmentally responsible tourism practices.
- **National Geographic Expeditions:** Expert-led journeys that combine cultural immersion, conservation, and education, providing travellers with in-depth insights into nature, history, and culture.
- **Ethical Traveller:** A travel initiative and resource that highlights destinations and operators that uphold high ethical, environmental, and social responsibility standards.

Outdoor Active and Adventure Tourism (water sports, cycling and hiking)

Market segment description and profile

Adventure tourism represents one of the most dynamic and rapidly expanding segments within the global travel industry. Defined as “tourist activities which include physical activity, a cultural exchange, and interaction with nature”, adventure tourism encompasses a holistic experience where nature, culture and physical activity come together⁷².

Adventure tourism isn't solely about extreme activities or adrenaline-inducing experiences. Rather, it encompasses a broader spectrum of activities that facilitate personal transformation and worldview expansion.

The adventure tourism market can be segmented into two primary categories⁷³:

⁷² Adventure Travel Trade Association (ATTA). 'Adventure Travel: Definitions'. *Adventure Travel Trade Association*, n.d. [Online]. Available: <https://www.adventuretravel.biz/what-is-adventure-travel/adventure-travel-definitions/>

⁷³ Sung, Hyun-Ju, and Sidney J. Suh. 'Classification of Adventure Tourism Types and Tourists' Motivations'. *Sustainability*, vol. 12, no. 14, 2020, p. 5785. *MDPI*, doi:10.3390/su12145785.

- **Soft adventure tourism:** Characterised by activities that are physically accessible and less risky than hard adventures. These activities offer a balance of adventure and comfort, making them accessible to a broader range of travellers, including families and those seeking less physically demanding experiences. These including hiking on well-marked trails, recreational cycle tours and gentle water sports, for example.
- **Hard adventure tourism:** Involves more challenging and risky activities that often require specialised skills, training or equipment, and typically pushes participants' physical and mental boundaries, such as mountaineering and rock climbing, white-water rafting and kayaking, mountain biking on technical trails, etc.

The adventure tourism market attracts a diverse range of travellers with varying demographics, motivations, and preferences⁷⁴:

- The 30-50 years age group leads the global adventure tourism market share, with a notable trend of family trips within this segment. This trend is likely driven by a desire for more quality family time, a shift towards experiential travel, and the increasing availability of family-friendly adventure options.
- The 51-60 age group shows strong interest in adventure tourism, often opting for softer adventure options like hiking and cycling. This demographic typically possesses both the financial resources and the time to engage in adventure travel, particularly during retirement or semi-retirement.
- Younger millennials and Gen Z individuals (25-40 years) also demonstrate a growing preference for adventure travel, seeking thrilling and immersive experiences. These younger travellers are often motivated by a desire for authentic experiences that align with their values and provide opportunities for personal growth and social media sharing.

A defining characteristic of the adventure tourism market is the high level of environmental and social consciousness among its participants⁷⁵. This includes a desire to support products that employ sustainable tourism practices to minimise ecological impact, a desire for authentic cultural interactions and learning opportunities within the tourism experience and lastly experiences that positively impact local communities and contribute to conservation efforts.

Adventure travellers are driven by a complex interplay of motivations that extend far beyond the pursuit of adrenaline, encompassing personal growth, connection with natural environments, cultural engagement, psychological rejuvenation, and social belonging⁷⁶:

- Adventure travel provides opportunities for self-discovery, skill development, and confidence building through challenging experiences that push personal boundaries and create a sense of accomplishment.
- Adventure tourists are motivated by desires to escape urban environments, learn about ecosystems and conservation, and experience pristine, unspoiled landscapes perceived as authentic and undisturbed.

⁷⁴ Allied Market Research. *Adventure Tourism Market by Type (Hard Adventure, Soft Adventure, and Others), by Activity (Land-Based Activity, Water-Based Activity, and Air-Based Activity), by Traveler Type (Solo, Group, Family, and Couples), and by Age Group (20-30 Years, 31-40 Years, 41-50 Years, 51-60 Years, and Above 60 Years): Global Opportunity Analysis and Industry Forecast, 2023-2032*. Allied Market Research, 2023. [Market Research Report].

⁷⁵ Wheeler, Alison, and Edmund Hillary. 'Ecotourism in the Himalayas: Ecotourism or Eco-Sell?'. *Tourism Recreation Research*, vol. 18, no. 1, 1993, pp. 39–47. *Taylor and Francis Online*, doi:10.1080/02508281.1993.11014655.

⁷⁶ Iso-Ahola, Seppo E. 'The Social Psychology of Tourism Motivation: A Conceptual Analysis'. *Leisure Sciences*, vol. 5, no. 2, 1982, pp. 145–75. *Taylor and Francis Online*, doi:10.1080/01490408209512984.

- Adventure travellers seek meaningful engagement through authentic local interactions, opportunities to learn about traditional lifestyles and practices, and experiences that connect them with the historical and cultural significance of destinations.
- Adventure travel offers a break from routine, opportunities to disconnect from digital devices, and mental health benefits through nature immersion and physical activity.
- Adventure travellers value creating shared memories with companions, gaining social status through distinctive shareable experiences, and reinforcing membership in activity-based communities.

Outdoor and Active Adventure travellers in The Gambia

The Gambia possesses a unique combination of natural assets, cultural richness, and strategic advantages that position it exceptionally well to capitalise on the growing demand for outdoor active and adventure tourism experiences.

The Gambia River System supports varied ecosystems providing diverse settings for water-based adventures, while the country's Atlantic coastline offers significant potential for water sports development.

While The Gambia lacks mountainous terrain, its landscape offers distinct advantages for certain types of adventure activities, such as hiking and cycling. An extensive network of rural paths and unpaved roads connecting villages and natural areas create potential routes for cycling and hiking adventures which combine physical activity with cultural immersion.

Lastly, its compact size allows visitors to experience diverse adventure activities within relatively short travel distances, maximising activity time during shorter stays.

General travel behaviour

Adventure travellers demonstrate distinctive patterns in their approach to travel planning, duration, and experience preferences⁷⁷.

- Trekkers typically travel three times a year and prefer longer stays at destinations compared to average tourists. There is a growing trend toward extended trips lasting over two weeks, often incorporating multiple destinations into a single journey.
- Increasingly, adventure tourists travel during shoulder seasons to avoid crowds and experience destinations more authentically.

Accommodation preferences vary widely across the adventure tourism spectrum⁷⁸:

- Adventure tourists seek a range of accommodation types, from camping and eco-lodges to comfortable hotels for those seeking more amenities.
- Many adventure travellers prioritise accommodations that reflect local character and environmental responsibility, even when choosing more comfortable options.

Adventure travellers exhibit distinctive spending behaviours:

⁷⁷ CBI Ministry of Foreign Affairs. *What requirements must adventure tourists meet to travel to Europe?*. CBI, 2023. [Online]. Available: <https://www.cbi.eu/market-information/tourism/adventure-tourism/buyer-requirements> [Accessed: 17 October 2024]. (Remember to update access date)

⁷⁸ UNWTO. *Sustainable Tourism and Local Communities*. UNWTO, 2012.

- Although adventure travellers may spend less per day on accommodations, their longer stays and willingness to invest in quality experiences contribute significantly to local economies, particularly in remote areas.
- Adventure tourists often prioritise spending on activities and experiences over luxury accommodations or dining.
- There is a readiness to pay premium prices for authentic and unique experiences that offer genuine cultural interactions and responsible travel practices.

Adventure travellers engage in extensive research using multiple channels:

- Adventure travellers conduct extensive online research before making travel decisions, utilising multiple digital platforms for information gathering.
- Word of mouth and recommendations from fellow enthusiasts significantly impact decision-making. For cyclists, word of mouth or the Internet are primary information sources about destinations.
- Activity-specific publications, forums, and communities serve as trusted information sources for enthusiasts.
- Visual platforms like Instagram significantly influence destination choices, with compelling imagery of landscapes and activities driving interest.

Adventure travellers exhibit specific patterns in their booking behaviour:

- Travellers often prefer direct bookings for greater control over their itineraries and to avoid additional fees associated with third-party platforms.
- While some adventure trips require significant advance planning, trekkers often view travel as a lifestyle rather than just a holiday, leading to more spontaneous travel decisions.
- For challenging activities or lesser-known destinations, adventure travellers are likely to engage specialised tour operators and guides.
- Online bookings are expected to account for a significant portion of adventure tourism spending, underscoring the importance of digital presence and booking capabilities.

Product requirements

For water sports enthusiasts, high-quality safety-certified equipment appropriate for different skill levels and specific activities is essential. Also required is on-site technical assistance for adjustments, repairs and guidance, as well as vessels suitable for specific water conditions, balancing comfort, stability and environmental impact. Further requirements include professionally trained guides with water rescue certification and local knowledge, and appropriate rescue equipment and procedures for specific environments.

For cyclists, well-maintained bicycles suitable for local terrain with options for different skill levels are necessary, as well as specific bicycle types for different activities (mountain, touring, gravel bikes and e-bikes). Properly sized safety equipment including helmets and reflective gear and reliable maintenance services are also required.

Both cyclists and hikers need detailed maps and route descriptions highlighting points of interest and difficulty levels. These should be complemented by cultural and natural interpretation about

sites and features along routes, and appropriate waymarking and signage, particularly for dedicated cycling trails.

The cycling and hiking experience is enhanced by strategically placed rest areas with shade, seating and basic facilities, and access to water refill stations and appropriate food options. Equally important are designated viewpoints and experience zones at scenic or significant locations.

For hikers, well-developed infrastructure includes clearly marked and maintained trails with information about distance and difficulty. Standardised grading systems help hikers select appropriate routes, while networks offering varied options cater to different abilities and interests. Thematic routes focusing on wildlife, heritage or botany appeal to special interest segments.

Safety provisions include directional markers, navigation resources, emergency systems and information about environmental hazards. Supporting infrastructure such as rest areas, water sources and, for multi-day routes, appropriate overnight facilities enhance the experience. Professional guides, educational content about natural and cultural features, wildlife observation opportunities and conservation engagement add depth to the hiking experience.

Marketing approach

Shows and events

- **Adventure Travel World Summit (ATWS):** Organised by the Adventure Travel Trade Association, this summit brings together adventure tourism stakeholders including tour operators, providing an excellent platform for networking and product showcase.
- **The New York Travel & Adventure Show:** Provides access to the North American market, which dominates the global adventure tourism sector with 40.7% market share.
- **The Telegraph Outdoor Adventure & Travel Show:** An adventure travel event for consumers held in London, directly targeting UK-based adventure enthusiasts.
- **The Outdoor Adventure & Travel Show:** Held in several cities across Canada from February to April, this show targets consumers interested in outdoor activities and adventure travel.
- **Tour Natur:** A walking and trekking trade fair held in September in Dusseldorf, Germany, providing access to the German hiking and trekking market.

Online forums, associations and publications

- **General adventure tourism associations, such as the Adventure Travel Trade Association and Adventure Collection,** as well as associations specific to sports such as European Ramblers' Association, Adventure Cycling Association, Mountain IQ, London Adventure Group, and Sierra Club.
- Online communities such as Lonely Planet's Thorn Tree, Reddits r/travel and r/solotravel communities, and sports-specific forums such as paddling.com, Horizons Unlimited, Adventure Cycling Association Forum, CycleChat and AllTrails.
- Publications such as Adventure Travel News, National Geographic Traveller, Wanderlust Magazine, Outside Magazine, Paddling Magazine, Adventure Cyclist, Cyclist Magazine, Trek & Mountain, Active Traveller and Trail Magazine.

Tour operators

- General adventure tour operators such as G Adventures, Intrepid Group, Exodus, Explore!
- Activity-specific tour operators such as:
 - Water sports: Much Better Adventures and Water by Nature
 - Cycling: KE Adventure Travel, Saddle Skedaddle, African Bikers, and TDA Global Cycling.
 - Hiking: KE Adventure Travel, Macs Adventure, Walks Worldwide and World Expedition.
- Tour operators focussing on responsible travel, including Responsible Travel, Wild Frontiers, Boundless Journeys and Adventures Within Reach.

Water-based / Boating holidays and Excursions

Market segment description and profile

River cruising constitutes a rapidly growing segment within the global tourism industry, particularly in Europe where iconic waterways like the Danube, Rhine, and Douro rivers have established themselves as premier cruise destinations.

According to a report published by Future Market Insights in March 2024, the river cruise market is estimated to be worth US\$2.5 billion in 2024 and is projected to nearly triple its economic footprint to US\$7.3 billion by 2034.⁷⁹ This growth trajectory represents a significant opportunity for emerging river cruise destinations such as The Gambia.

The boating and river cruising market caters to a diverse range of travellers seeking enriching experiences on inland waterways. As ocean cruising continues to grow in popularity, river cruises are carving out their own distinct niche in the travel market, offering more intimate and educational experiences. Smaller ships, educational opportunities, intimate settings, and increased luxury are key factors driving the growing demand for river cruising.⁸⁰

The profile of the boating and river cruising market is dynamic and evolving. While traditionally associated with older demographics, the market is now attracting a younger generation of travellers, including Millennials and Generation X.⁸¹ This shift is driven by a desire for unique experiences, cultural immersion, and a more relaxed and intimate travel style. One of the most noteworthy shifts in the marketplace is the profile of the average river cruiser, with a noticeable trend towards younger demographics, particularly on active and discovery cruises.⁸²

- River cruising often attracts travellers with higher disposable incomes due to the premium nature of the experience.⁸³ These tourists typically occupy middle to upper income brackets, reflecting the higher price point of river cruise products compared to mass-market tourism offerings.

⁷⁹ "Opportunities abound in river cruise market," Riviera Maritime Media, 28 June 2024, <https://www.rivieramm.com/opinion/opinion/opportunities-abound-in-river-cruise-market-81370>

⁸⁰ Ben Davidson, "Why River Cruises Are Great If You Think You Don't Like Cruises," Business Insider, 12 September 2023, <https://www.businessinsider.com/river-cruise-great-if-you-dont-like-cruises-opinion>

⁸¹ "Opportunities abound in river cruise market," Riviera Maritime Media, 28 June 2024.

⁸² "The powerful new cruise through a region of West Africa with a painful past," The Telegraph, 5 October 2020, <https://www.telegraph.co.uk/travel/cruises/articles/the-gambia-river-cruise-africa-adventure/>

⁸³ "The Gambia Tourism Market Study," Gambia Competition and Consumer Protection Commission, 2018, p.3, <http://gcc.gm/wp-content/uploads/2018/05/Tourism-Study-validation-FINAL-1.pdf>

- A significant portion of this market has tertiary education qualifications, with many having professional or managerial careers.⁸⁴ This educational profile influences their interest in cultural and historical aspects of destinations.
- While couples and solo travellers are common, multi-generational families and groups of friends are increasingly participating in river cruises.⁸⁵ There's also an uptick in interest from families with older children seeking educational travel experiences.⁸⁶
- River cruisers tend to value experiences over material possessions and seek opportunities for personal enrichment and cultural immersion.⁸⁷ They often lead active lifestyles and have a keen interest in continuing education through travel.
- Interests vary widely, but common themes include history, culture, nature, and gastronomy.⁸⁸ Many river cruise tourists display specific interests in architecture, art, wine, or regional cuisines that influence their destination and itinerary choices.
- River cruisers often prioritise comfort, convenience, and personalised service.⁸⁹ They value authenticity in cultural experiences but are unwilling to sacrifice basic comforts to achieve this authenticity.
- This segment typically engages in extensive pre-trip research and appreciates detailed itineraries and organised excursions.⁹⁰ They are information-seekers who often consult multiple sources before making travel decisions.
- River cruisers are generally open to new experiences and appreciate a relaxed and informal atmosphere.⁹¹ They seek a balance between structured activities and free time for personal exploration.

Several key motivations drive travellers to choose boating and river cruising:

River cruises offer a deeper dive into local cultures and destinations compared to ocean cruises or traditional land tours.⁹² They provide access to narrow ports and shallow waterways, offering travellers opportunities to experience new cultures, visit historical sites, and enjoy cruise luxury while maintaining authentic connections to destinations.⁹³

River cruises provide a hassle-free travel experience with comfortable accommodations and organised itineraries. The appeal of unpacking once while visiting multiple destinations resonates strongly with this market, particularly those seeking relaxation combined with exploration.

The opportunity to enjoy picturesque landscapes and ever-changing scenery is a major draw for river cruise tourists.⁹⁴ The slow pace of river travel allows for appreciation of scenic vistas and natural environments that might be missed with faster transportation modes.

⁸⁴ Yunus S Saliu, "Cruise Ships Arrival Spark Surge in Tourism to The Gambia," DTourisphere, 26 November 2024, <https://dtourisphere.com/cruise-ships-arrival-spark-surge-in-tourism-to-the-gambia/>

⁸⁵ Ibid

⁸⁶ Valentin Belentschikow, et al., "River cruise characteristics from a destination management perspective," p.5.

⁸⁷ Ibid

⁸⁸ Sofia Gouveia, et al., "International demand for the Douro (Portugal) river cruises: A gravity model approach," *Tourism Economics*, Vol. 23(8), 2017, pp.1679–1686.

⁸⁹ Valentin Belentschikow, et al., "River cruise characteristics from a destination management perspective," p.6.

⁹⁰ "Advancing river cruise product design: insights from cross-quality elasticity," *Journal of Sustainable Tourism*, 22 August 2024, <https://www.tandfonline.com/doi/full/10.1080/13683500.2024.2393671?af=R>

⁹¹ "Systematic approach to the quality assessment of river cruise product," *Service & Tourism: Current Challenges*, 15 June 2016, <https://service-rusjournal.editorum.ru/en/nauka/article/12158/view>

⁹² "Opportunities abound in river cruise market," *Riviera Maritime Media*, 28 June 2024.

⁹³ Seatrade Cruise Global, "About the Event," accessed 3 March 2025, <https://www.seatradecruiseglobal.com/en/about.html>

⁹⁴ Cruise Lines International Association, "CLIA River Cruise Conference," <https://cruising.org/en-gb/events/river-cruise-conference>

River cruises often focus on historical sites, local traditions, and authentic experiences. Many rivers served as historical transportation routes, with settlements and cultural developments concentrated along their banks, creating natural pathways through a region's heritage.

Boating and river cruising in The Gambia

The Gambia presents several compelling attributes that position it favourably for river cruise tourism development. Foremost among these is the Gambia River itself—a navigable waterway that historically served as a vital transportation artery and could potentially be revitalised as a tourism corridor. This river, which bisects the country, offers access to diverse landscapes, wildlife habitats, and cultural sites that would otherwise remain inaccessible to conventional tourism.

- The Gambia's river cruising market is relatively untapped, offering an opportunity to establish a unique and exclusive destination.
- The Gambia River is lined with lush mangroves, diverse birdlife, and charming villages, providing a captivating backdrop for river cruises.
- The river's role as a historical transportation corridor has resulted in a concentration of cultural sites along its banks, creating natural stopping points for river cruise itineraries.
- The Gambia is known for its birding potential, with over 500 species documented.
- The Gambia offers opportunities for authentic cultural immersion, increasingly valued by river cruise tourists.

General travel behaviour

- River cruises typically range from 7 to 14 days, with some extending to longer durations for more in-depth exploration.
- River cruisers are generally willing to spend more on travel experiences, seeking high-quality accommodations, personalised service, and unique excursions.
- While some prefer all-inclusive luxury cruises, others seek more independent and adventurous experiences, with options for customised itineraries and active excursions.⁹⁵
- In terms of the cruise experience structure, most river cruise packages include several shore excursions as standard, unlike ocean cruises where shore excursions are often optional extras.⁹⁶
- River cruise tourists are less exposed to independent service providers upon disembarkation compared to ocean cruise passengers.⁹⁷ This suggests that integrated packaging of experiences is important.

Product requirements

The quality of cruise products is evaluated across multiple dimensions, including "ship specifications, cruise itinerary, onboard facilities and services."⁹⁸ For The Gambia, this means

⁹⁵ Travel Market Report, "River Cruising Has Never Been More Desirable," 1 January 2025, <https://www.travelmarketreport.com/cruises/articles/river-cruising-has-never-been-more-desirable-here-are-the-reasons-why>.

⁹⁶ River Cruise Advisor, "Shore Excursions: Which River Cruise Companies Include Them in Fare," January 2015, <https://rivercruiseadvisor.com/2015/01/shore-excursions-river-cruise-companies-include-fare/>.

⁹⁷ Lopes & Dredge, "River Cruise Characteristics from a Destination Management Perspective," 2018, https://portal.findresearcher.sdu.dk/files/172271153/RN_River_cruises_Prepub.pdf.

⁹⁸ Service & Tourism Journal, "Systematic Approach to the Quality Assessment of River Cruise Product," 15 June 2016, <https://service-rusjournal.editorum.ru/en/nauka/article/12158/view>.

investment in appropriate river vessels that meet international standards while being adapted to the specific conditions of the Gambia River.

Accommodation standards are particularly important for the river cruise market. The design of cabins and public spaces on river cruise vessels should consider contemporary expectations regarding comfort and amenities, potentially moving away from traditional tiered cabin designs towards more spacious and well-appointed configurations.⁹⁹

Depending on the target market, amenities could range from basic comforts to luxury features such as spacious cabins, fine dining, swimming pools, and spas. Essential services include:

- Comfortable public spaces for socialising and relaxation.
- Dining facilities capable of providing high-quality cuisine.
- Observation areas maximising views of the passing landscape.
- Air conditioning and climate control appropriate to Gambian conditions.
- Basic wellness facilities such as small gyms or treatment rooms.
- Educational spaces for lectures and presentations.
- Reliable communications systems including Wi-Fi connectivity.

Itinerary development represents a critical component of river cruise product design. This should focus on identifying compelling stopping points along the river that offer opportunities for cultural interactions, wildlife viewing, and other activities aligned with river cruise tourists' interests.

A variety of on-ship and onshore activities should be offered, catering to different interests and activity levels. This could include:

- Guided cultural tours to historical sites and traditional villages.
- Nature walks focusing on birdlife and riverine ecology.
- Adventure activities such as kayaking in tributaries or cycling excursions.
- Visits to markets and artisanal workshops.
- Culinary experiences featuring traditional Gambian cuisine.
- Interactive community-based experiences with opportunities for meaningful cultural exchange.
- Expert guides with deep knowledge of Gambian history, culture, and ecology.
- Onboard lectures and presentations about relevant topics.
- Food-themed journeys that incorporate local culinary traditions.

Successful river cruise operations require supporting infrastructure beyond the vessels themselves:

- Appropriate docking infrastructure at key points along the river, designed to accommodate the specific vessels being used and facilitate safe embarkation and disembarkation.
- Basic facilities at stopping points, including:
 - Safe landing areas.
 - Restroom facilities.
 - Information and interpretation materials.
 - Retail opportunities for local crafts and products.

Efficient connections between:

⁹⁹ Cruise Critic, "River Cruise Cabins: What to Expect," <https://www.cruisecritic.com/articles/river-cruise-cabins-what-to-expect>.

- International arrival points (particularly Banjul International Airport).
- Cruise embarkation points.
- Accommodation for pre- and post-cruise stays.
- Shore excursion destinations not directly accessible from the river.

Marketing approach

Shows and events

- **Seatrade Cruise Global**, held annually in Miami, is the cruise industry's premier global event and provides opportunities to connect with major cruise lines and tour operators.
- **CLIA River Cruise Conference**, organised by the Cruise Lines International Association, specifically targets the river cruise sector.

Media and publications

- **Cruise Critic** (www.cruisecritic.co.uk) is a leading consumer review site and online community for cruise enthusiasts, with dedicated sections for river cruising.
- **Cruise International Magazine**, the UK's only newsstand cruise publication, reaches consumers actively interested in cruise travel.
- **Travel trade publications** such as Porthole Cruise and Travel Magazine, Seatrade Cruise online news, TTG and Travel Weekly are read by travel professionals who influence booking decisions.
- **Consumer publications** such as River Voyages.com, Blue Water Sailing, Sailing Today and World of Cruising.

Online forums

- CruiseCritic.com forums, particularly the "River Cruising" section, are frequented by experienced river cruise travellers and those planning future trips.
- Facebook groups such as "All about river cruises – Tips and Info" and "River Cruise Lovers" represent engaged communities of river cruise aficionados.

Tour operators

- **Viking River Cruises**, the world's largest river cruise company.
- **Variety Cruises**, already operates itineraries in West Africa.
- Tour operators which sell river cruising, such as Undiscovered Destinations, Tauck, World of Cruising and Responsible Travel

SAVE Tourism

Market segment description and profile

The SAVE (Scientific, Academic, Volunteer, and Educational) tourism segment encompasses visitors who travel with the primary purpose of learning, exploring, helping, and growing through meaningful interactions with destinations¹⁰⁰. These travellers seek experiences that provide personal development while making positive contributions to host communities and environments.

SAVE tourism represents a growing niche within the sustainable tourism industry, attracting travellers who are motivated by a desire to engage with destinations in ways that advance knowledge and contribute to enhancement of the places they visit.

¹⁰⁰ Grand View Research (2023). SAVE Tourism Market Size, Share & Growth Report, 2030.

The SAVE market comprises four distinct but overlapping subcategories:

- **Scientific Tourism** involves travellers from research institutions, universities, and other organisations seeking to advance scientific knowledge. These visitors conduct research that can help protect the environment, document cultural heritage, and contribute to local development initiatives. Their work often provides valuable information about a destination's assets and raises its profile internationally.
- **Academic Tourism** encompasses travel by professors, researchers, and students for academic purposes, including study abroad programmes, thesis research, visiting scholarships, school trips, and academic exchanges. These travellers participate in experiential learning activities that contribute to formal degree programmes or courses.
- **Volunteer Tourism**, also known as 'voluntourism', involves travel combined with voluntary service, often linked to personal or professional development. Voluntourists participate in activities that contribute positively to society, with primary motivations including environmental conservation, community development, and cultural immersion.
- **Educational Tourism** offers travellers learning experiences focused on self-improvement, career enhancement, or knowledge acquisition. This includes language courses, traditional craft workshops, experiential learning programmes, and school trips. These individuals or groups travel to enhance their personal knowledge rather than for academic credit.

The SAVE tourism market is dominated by youth travel, with the 18-34 age group accounting for the largest share (41.2%) of SAVE tourists¹⁰¹. Millennials and Generation Z travellers show strong interest in experiential travel that allows them to learn new skills while making positive impacts.

Europe currently dominates the global SAVE tourism market as a source region, though interest is growing worldwide¹⁰². Volunteer tourism currently holds the largest share within the SAVE market, with strong interest in South America and Africa as destination regions.

SAVE tourism in The Gambia

Unlike conventional beach tourism, which peaks during specific seasons, SAVE tourism can operate year-round, helping to address The Gambia's challenge of seasonal tourism patterns. Scientific research, volunteer programmes, and educational initiatives can be conducted throughout the year, contributing to a more stable tourism economy.

SAVE tourism also creates opportunities to develop tourism in inland areas, promoting a more balanced distribution of tourism benefits across the country and reducing pressure on coastal resources.

SAVE tourists, particularly volunteers and academic researchers, can contribute to skills transfer and capacity building within local communities¹⁰³. This can help address The Gambia's challenge of limited tourism workforce skills through training programmes, knowledge sharing, and collaborative initiatives.

¹⁰¹ Ibid

¹⁰² CBI (2020). The European market potential for SAVE tourism.

¹⁰³ CBI (2020). The European market potential for SAVE tourism.

For a country facing infrastructure challenges like The Gambia, SAVE travellers represent an ideal market as they tend to be more tolerant of basic facilities and services. They often view rustic conditions as part of the authentic experience and don't mind delays or inconveniences.

General travel behaviour

SAVE tourists are motivated by the desire to contribute, learn, or achieve specific objectives during their travels. Their itineraries are typically organised around these purposes rather than leisure alone¹⁰⁴.

Scientific researchers, academic groups, and volunteers often stay for extended periods, ranging from several weeks to months, which allows for deeper engagement with local communities and more significant economic impact. They also often travel throughout the year based on project timelines, academic calendars, or research requirements.

Unlike conventional tourists who often remain in established tourism zones, SAVE travellers seek authentic experiences in less-visited areas. They are willing to venture into rural communities and inland regions of The Gambia where tourism infrastructure may be limited¹⁰⁵.

Many SAVE tourists, particularly academic groups and volunteer organisations, travel in small to medium-sized groups. This creates opportunities for specialised group accommodations and services¹⁰⁶.

SAVE tourists seek meaningful interactions with local communities rather than superficial tourist experiences. They value opportunities to learn local languages, participate in traditional activities, and develop relationships with community members¹⁰⁷.

While SAVE tourists are generally budget-conscious, they are willing to spend on experiences and services that align with their values and objectives. They typically prioritise locally owned businesses, sustainable operations, and initiatives that benefit communities directly¹⁰⁸.

Despite their tolerance for basic facilities, SAVE tourists often require reliable internet access to document their work, communicate with home institutions, or share their experiences online¹⁰⁹.

SAVE tourists are increasingly conscious of the ethical implications of their travel choices, including environmental impacts, cultural sensitivity, and genuine community benefits. They actively seek information about how their presence affects local communities.

Product requirements

For scientific tourists, The Gambia should highlight research opportunities in fields such as ornithology, marine biology, anthropology, and environmental science. Basic research facilities, access to natural areas, and connections with local academic institutions are essential¹¹⁰.

Establishing partnerships with international universities and educational institutions can facilitate academic tourism. Exchange programmes, field schools, and research collaborations provide structured opportunities for academic visitors¹¹¹.

¹⁰⁴ UNWTO (2014). SAVE Tourism Guide.

¹⁰⁵ Ibid

¹⁰⁶ Ibid

¹⁰⁷ Ibid

¹⁰⁸ Ibid

¹⁰⁹ Ibid

¹¹⁰ UNWTO (2014). SAVE Tourism Guide.

¹¹¹ CBI (2020). The European market potential for SAVE tourism.

Well-structured volunteer programmes that address genuine community needs are essential for voluntourists. These should be designed in partnership with local communities to ensure they provide meaningful assistance rather than displacing local workers¹¹². Community-owned and operated tourism enterprises enable SAVE tourists to engage authentically with local culture while ensuring economic benefits remain within communities.

Opportunities for cultural immersion, including language learning, traditional craft workshops, cooking classes, and participation in local festivals and ceremonies, are highly valued by SAVE tourists¹¹³.

While luxury is not a priority for most SAVE tourists, clean, safe, and sustainable accommodation options are essential. These may range from homestays and community guesthouses to eco-lodges and research stations¹¹⁴.

Reliable transportation options to reach rural communities and research sites, including public transport and specialised tour services, are necessary for SAVE tourists.

Comprehensive information about research opportunities, volunteer placements, ethical considerations, and cultural norms helps SAVE tourists prepare for their experience and behave responsibly.

Marketing approach

Events and shows

- **Academic Conferences:** Annual meetings of academic associations in fields relevant to The Gambia's research opportunities.
- **Volunteer and Gap Year Fairs:** University gap year fairs and volunteer recruitment events and Volunteer Abroad Conference.

Associations and institutions

- **Academic and research networks:**
 - Establishing partnerships with universities known for field research in relevant disciplines.
 - African Studies Association connects researchers specialising in African studies.
 - The International Volunteer Programs Association, a network of international volunteer organisations.
- **Conservation and development organisations:**
 - Africa Foundation supports community and conservation projects across Africa.
 - Peace Corps is a government-sponsored volunteer programme with presence in West Africa.
 - The SAVE Travel Alliance is a network connecting responsible travellers with sustainable destinations.
- **Educational travel programmes:**

¹¹² Ibid

¹¹³ My Gambia (2023). Sustainable & community-based tourism.

¹¹⁴ Ibid

- Partnerships with gap year programmes, study abroad offices, and alternative break programmes.

Online Platforms

Volunteer matching platforms:

- Volunteer World: Platform connecting volunteers with projects worldwide.
- Workaway: Platform facilitating cultural exchange and volunteer opportunities.

Educational programme directories:

- GoAbroad: Directory of study abroad and volunteer opportunities.
- StudyAbroad.com: Resource for finding educational travel programmes.

Research Opportunity Networks:

- FindAPhD: Platform for doctoral research opportunities.
- Academic Positions: Listings for academic positions and research opportunities.

Social Media:

- Targeted content on platforms popular with SAVE tourists, including Instagram, Facebook, and YouTube.
- Participation in online communities and forums focused on volunteering, research, and educational travel.

Publications and media

SAVE Tourism Magazines and Guides:

- Verge Magazine: Publication focused on international volunteering and study abroad.
- International Educator: Magazine for international education professionals.
- Green Global Travel: Blog focusing on ecotourism and sustainable travel.

General Travel Media with SAVE Focus:

- National Geographic: Features scientific research and educational travel.

Tour Operators

Volunteer Placement Organisations:

- GoEco: Offers volunteer programmes worldwide, including West Africa.
- Projects Abroad: Operates volunteer placements in several African countries.
- International Volunteer HQ: Provides a range of volunteer opportunities in Africa.
- GVI: Specialises in sustainable volunteer programmes worldwide.

Educational Travel Operators:

- World Strides Educational Student Travel: Organises educational travel programmes for students.
- Smithsonian Journeys: Offers educational travel with a focus on culture and natural sciences.

- EXPLORE INC: Specialises in educational group safaris and tours.
- **Field Research Facilitators:**
 - Earthwatch Institute: Connects volunteers with scientific research expeditions.
 - Operation Wallacea: Organises biological and conservation research programmes.

Religious Tourism

Market segment description and profile

The religious tourism market represents a significant and growing segment within the global tourism industry. While Christianity held the largest share of this market in 2023, the demand for Islamic religious tourism, Halal Tourism as it is known, is expected to grow to US\$410.9 billion by 2032, up from US\$256.5 billion in 2023¹¹⁵. Muslim religious tourists are not just interested in pilgrimages; they seek diverse travel experiences that cater to their faith-based needs and cultural preferences¹¹⁶. This market segment is increasingly comprised of younger travellers¹¹⁷, who are often interested in immersive experiences that offer both personal growth and connection to cultural heritage.

Religious tourism in The Gambia

The Gambia's religious tourism market for Muslim travellers is characterised by a blend of spiritual and cultural experiences. With Islam accounting for approximately 97% of The Gambia's population¹¹⁸, the country offers an authentic Islamic environment that is highly appealing to Muslim travellers seeking spiritual fulfilment and cultural connections. The Gambia further presents a compelling destination for Muslim travellers for several key reasons:

- The Gambia's rich Islamic heritage dates to the 11th century when the first Muslim communities arrived¹¹⁹. The country is home to numerous mosques and sacred sites, including the Serrekunda Market Mosque, Dippa Kunda Mosque, and the Sacred Sand Dunes Mosque in Gunjur (associated with the revered Islamic scholar Shaykh Umar Futi Taal)¹²⁰.
- As a predominantly Muslim country, The Gambia offers visitors the opportunity to engage with local Muslim communities and participate in authentic Islamic traditions and practices. This cultural immersion is highly valued by many religious tourists who seek to deepen their understanding of Islam across different cultural contexts¹²¹.

General travel behaviour

¹¹⁵ "Niche to mainstream: Evolution of Halal tourism in global travel industry", Al Jazeera, <https://www.aljazeera.com/news/2025/2/1/niche-to-mainstream-evolution-of-halal-tourism-in-global-travel-industry#:~:text=The%20Halal%20and%20Muslim%2Dfriendly,on%20the%20rise%20in%20demand.>

¹¹⁶ "Religious Heritage, Tourism, and Pilgrimage in Africa," ResearchGate, https://www.researchgate.net/publication/367206413_Religious_Heritage_Tourism_and_Pilgrimage_in_Africa

¹¹⁷ "Muslim travel market set for 230 million international arrivals by 2028, with an expenditure of USD 225 billion", WiT, <https://www.webintravel.com/muslim-travel-market-set-for-230-million-international-arrivals-by-2028-with-an-expenditure-of-usd-225-billion/>

¹¹⁸ "Islam in the Gambia," Wikipedia, accessed February 28, 2025, https://en.wikipedia.org/wiki/Islam_in_the_Gambia

¹¹⁹ Ibid

¹²⁰ "Spiritual Seclusion in The Gambia," Sacred Footsteps, <https://sacredfootsteps.com/2021/06/10/spiritual-seclusion-in-the-gambia/>

¹²¹ The Muslim Sacred Site Kenye," My Gambia, <https://www.my-gambia.com/mymagazine/the-muslim-sacred-site-kenye/>

Muslim travellers often prefer longer trips, typically spending at least one to two weeks at their chosen destination. This allows for a more immersive experience and the opportunity to engage in various activities¹²². They often travel during religious holidays and festivals, but there is also significant travel throughout the year.

Travel with family or in large groups is common among Muslim tourists. Family-oriented travel is particularly important for those from Arab countries, highlighting the need for family-friendly accommodations, activities, and facilities¹²³.

Muslim religious tourists engage in a variety of activities, including:

- Visiting mosques and sacred sites for prayer and spiritual reflection.
- Exploring Islamic historical and cultural landmarks.
- Participating in religious events and festivals.
- Engaging with local Muslim communities.
- Sightseeing and experiencing local culture beyond religious sites.¹²⁴

Muslim travellers' destination choices are influenced by:

- The availability of halal food, prayer facilities, and culturally sensitive environments.¹²⁵
- Word-of-mouth recommendations from friends, family, and religious leaders.¹²⁶
- Information from online platforms, travel agencies, and social media.
- Cost, accessibility, and visa requirements.
- Safety and security considerations, especially for families.¹²⁷

Product requirements

- Visitors seek genuine connections with Islamic heritage and spiritual sites. This includes access to historical mosques, sacred wells, and other sites used by prominent religious figures for prayers.
- Access to halal food is a primary concern for Muslim travellers. Restaurants, hotels, and food outlets should offer halal options and clearly display halal certification.
- The availability of mosques and prayer rooms at various locations, including hotels, airports, and tourist attractions, is crucial for Muslim travellers to fulfil their religious obligations.

¹²² "Travel habits and patterns of Muslim travelers," CrescentRating, <https://www.crescentrating.com/magazine/muslim-travel/3649/travel-habits-and-patterns-of-muslim-travelers.html>

¹²³ Ibid

¹²⁴ "Segmentation of Religious Tourism by Motivations: A Study of the Pilgrimage to the City of Mecca," MDPI, <https://www.mdpi.com/2071-1050/14/13/7861>

¹²⁵ "The Impact of Destination Attributes on Muslim Tourist's Choice," ResearchGate, https://www.researchgate.net/publication/264464931_The_Impact_of_Destination_Attributes_on_Muslim_Tourist's_Choice

¹²⁶ "The Spread of Islam in West Africa: Containment, Mixing, and Reform from the Eighth to the Twentieth Century," SPICE - Stanford,

https://spice.fsi.stanford.edu/docs/the_spread_of_islam_in_west_africa_containment_mixing_and_reform_from_the_eighth_to_the_twentieth_century

¹²⁷ Ibid

- Hotels and other accommodations should provide amenities such as prayer mats, Qibla direction indicators, and gender-sensitive facilities to cater to the specific needs of Muslim travellers.
- A welcoming and respectful environment that acknowledges Islamic values and cultural norms is essential. This includes appropriate dress codes, gender-sensitive facilities, and a general understanding of Islamic customs.
- Tourist guides who are knowledgeable about Islamic history, practices, and the significance of religious sites enhance the visitor experience and provide educational value.
- Reliable transportation to religious sites, clear signage (including Arabic where appropriate), and well-maintained infrastructure contribute to a positive visitor experience.
- A safe and secure environment is paramount, especially for families and those traveling with children.

Marketing approach

Events and shows

- **Arabian Travel Market (ATM):** One of the leading international travel and tourism events in the Middle East, with a focus on halal tourism and Muslim-friendly destinations.
- **World Halal Tourism Summit:** Specifically focused on the halal tourism market, providing opportunities to connect with tour operators and travel agencies specialising in Muslim travel.
- **OIC (Organisation of Islamic Cooperation) Tourism Fair:** Focused on tourism within OIC member countries, providing opportunities to showcase Islamic heritage and connect with relevant travel trade.

Publications and media

- **HalalTrip Magazine:** A leading publication focused on Muslim-friendly travel destinations and experiences.
- **Muslim Travel Girl:** A popular online platform and blog providing information on Muslim-friendly destinations and travel tips.
- **Halal Focus:** A news platform covering developments in the halal industry, including halal tourism.
- **Islamic Tourism Magazine:** Focuses on tourism destinations, activities, and services that cater to Muslim travellers.
- **CrescentRating:** Publishes reports, guides, and content related to Muslim-friendly travel and halal tourism.

Online forums

- **Muslim Travel Rocks Forum:** A community for Muslim travellers to share experiences and seek recommendations.
- **TripAdvisor Forums:** Has specific threads and discussions related to halal travel and Muslim-friendly destinations.

- **Halal Travel Guide Community:** An online community focused on halal travel experiences.
- **Muslim Travel Facebook Groups:** Various groups dedicated to Muslim travellers sharing experiences and recommendations.
- **Have Halal, Will Travel Community:** An online platform for Muslim travellers to share tips and experiences.

Associations and Clubs

- **World Islamic Tourism Organization (WITO):** Promotes Islamic tourism globally.
- **Islamic Chamber of Commerce and Industry (ICCI):** Connects businesses across the Islamic world, including those in the tourism sector.
- **Global Muslim Travel Alliance:** Network of organisations promoting Muslim-friendly travel.
- **Regional Islamic Organizations in West Africa:** Such as the Islamic Educational, Scientific and Cultural Organization (ISESCO) and local Islamic associations.
- **Islamic Cultural Centres in Source Markets:** Engaging with cultural centres in key source markets can help promote The Gambia as a destination.

Tour Operators

- **Halal Travel:** Specialises in halal-friendly travel packages worldwide.
- **Muslim Holidays:** Offers travel packages specifically designed for Muslim travellers.
- **Serendipity Tailormade:** UK-based tour operator specialising in halal-friendly travel.
- **Crescent Tours:** Offers halal-friendly holiday packages.
- **Islamic Travels and Tours:** Specialises in religious tourism for Muslim travellers.

Cruise Tourism

Market segment description and profile

While Africa has historically claimed only a small portion of cruise itineraries (around 1-2%), it is emerging as a promising frontier in cruise tourism¹²⁸. The African cruise market is projected to reach US\$149 million in 2024, with a healthy annual growth rate of approximately 8.6%¹²⁹. This growth is driven by increasing interest in untapped, exotic destinations beyond traditional cruise circuits, presenting an opportunity for West African ports, including The Gambia.

Demographically, cruise tourism attracts a diverse audience. The average age of cruise passengers is around 46 years, with 36% under the age 40¹³⁰. While retirees have traditionally formed a core customer base, younger generations are increasingly embracing cruise travel.

Many cruisers are working professionals—approximately 72% are employed, with only 21% retired¹³¹—and about 69% have a tertiary education¹³². Cruise travel tends to be family or

¹²⁸ "Ghana's untapped \$10bn opportunity in cruise and marine tourism," CediRates, 2025, <https://cedirates.com/news/ghanas-untapped-10bn-opportunity-in-cruise-and-marine-tourism>

¹²⁹ Ibid

¹³⁰ "State of the Cruise Industry," Cruise Lines International Association, 2024.

¹³¹ "Cruise Industry Statistics," PhotoAid, 2025.

¹³² Ibid

couples-oriented, with 84% of cruise travellers married and 80% travelling with their spouse¹³³. Multi-generational trips are common, with approximately 28% of cruisers travelling in groups spanning 3-5 generations¹³⁴. Solo travellers represent a smaller but growing segment (8-13%)¹³⁵. The income profile is relatively affluent, with an average household income of approximately US\$110,000¹³⁶, reflecting cruising's appeal to middle and upper-income groups with disposable travel budgets.

Cruise travellers are primarily motivated by the unique value proposition that cruising offers: the ability to visit multiple destinations in one trip combined with an all-inclusive holiday experience. Industry research consistently shows that "the ability to visit multiple destinations + value for the money are the top reasons cruisers love to cruise"¹³⁷. Cruise passengers appreciate the convenience of unpacking once while experiencing various destinations, along with the inclusive nature of cruise packages that typically cover accommodation, meals, entertainment, and transportation.

The "floating resort" model appeals to travellers who value hassle-free, pre-packaged travel experiences. Many cruisers enjoy the social and recreational aspects, including onboard activities and the camaraderie of fellow passengers. For older travellers, the ease of mobility and safety of a guided environment are key factors, while younger travellers and families are drawn to the variety of activities available for all ages. Exploration is another significant motivator, with an increasing segment of cruisers seeking cultural immersion and unique adventures, driving the rise in expedition cruising¹³⁸.

Cruise tourism in The Gambia

The cruise industry is witnessing a surge in interest for "expedition and exploration" itineraries, with passenger numbers on expedition cruises increasing by 71% between 2019 and 2023¹³⁹. As travellers seek new experiences beyond traditional cruise routes, West Africa—including The Gambia—is well-positioned to capitalise on this trend. The region is being recognised for its "pristine coastlines, rich cultural heritage, and diverse ecosystems"¹⁴⁰, attributes that The Gambia possesses in abundance.

The Gambia's location on Africa's west coast places it advantageously along potential repositioning cruise routes between Europe, the Mediterranean, and Southern Africa. Several major cruise lines, including MSC, Costa, Princess, and Silversea, have already begun routing ships along the West African coast¹⁴¹, indicating growing industry interest in the region.

The Gambia's tropical climate offers warm temperatures throughout the year, making it an appealing destination particularly for winter cruises from Europe when passengers seek sunny escapes. This aligns with the industry trend of offering "experience-rich" itineraries that combine cultural immersion with pleasant weather conditions¹⁴².

General travel behaviour

¹³³ Ibid

¹³⁴ Ibid

¹³⁵ Ibid

¹³⁶ Ibid

¹³⁷ Ibid

¹³⁸ Ibid

¹³⁹ "State of the Cruise Industry," Cruise Lines International Association, 2024.

¹⁴⁰ "Ghana's untapped \$10bn opportunity in cruise and marine tourism," CediRates, 2025

¹⁴¹ Ibid

¹⁴² "State of the Cruise Industry," Cruise Lines International Association, 2022

Cruise travellers tend to be thorough in their planning, typically beginning 4-6 months before departure¹⁴³, with many booking up to a year in advance for new ships or popular itineraries. Travel agents and advisors remain highly influential in this sector, with 73% of cruise travellers reporting that travel advisors had a meaningful impact on their decision to cruise¹⁴⁴. Cruise specialists help navigate the complexity of cabin choices, ship differences, and cruise packages.

Cruisers also frequently consult online reviews and forums (e.g., Cruise Critic, TripAdvisor) to read ship and port reviews from past passengers. They compare itineraries, study deck plans, and watch ship tour videos. While price is important, cruisers also consider the reputation of cruise lines, loyalty programme perks, and specific amenities. Brand loyalty is significant, with approximately 60% of cruise guests rebooking with the same line for future trips¹⁴⁵.

In ports of call, cruise travellers typically have limited time (usually 8-10 hours) to experience the destination. A significant portion, especially first-time visitors, book organised shore excursions through the cruise line or independent operators. These might include city tours, visits to cultural or historical sites, beach breaks, or adventure activities. Many cruisers appreciate the convenience and perceived safety of ship-arranged tours, knowing the ship won't depart without them.

More experienced travellers may explore independently, wandering the port town, hiring local transport or guides, or visiting nearby beaches. Most cruisers are eager to explore at each stop, as the changing destinations are a key part of cruising's appeal. They tend to spend money locally during port calls, purchasing souvenirs, handicrafts, or experiencing local cuisine.

Product requirements

A fundamental requirement for cruise tourism is adequate port infrastructure. Ideally, this would include a deep-water pier capable of accommodating large cruise ships, allowing passengers to disembark easily. If tendering (using small boats to shuttle passengers ashore) is necessary, it should be efficient and operate in calm waters. A proper cruise terminal or welcome centre with customs/immigration facilities, tourist information, restrooms, and shopping opportunities would enhance the visitor experience.

Smooth logistics are crucial, as cruise ships operate on tight schedules and value ports that can efficiently process thousands of passengers. For The Gambia, investment in port upgrades, potentially including dredging and terminal facilities, would be necessary to accommodate regular cruise calls. Even simpler infrastructure improvements, such as a reliable tender dock and shaded waiting areas, would significantly improve passenger comfort.

Both cruise lines and passengers prioritise safety. The Gambia would need to ensure political stability and low crime rates, particularly in tourist areas. Visible security at the port, vetted tour operators, and coordination with relevant authorities would enhance perceived safety. Health safety protocols are also important, including access to medical facilities and clear procedures for handling health emergencies.

The Gambia's reputation as one of West Africa's more stable democracies could be leveraged as an advantage, though continued efforts to maintain security and communicate safety measures

¹⁴³ "Cruise Industry Statistics," PhotoAid, 2025.

¹⁴⁴ "State of the Cruise Industry," Cruise Lines International Association, 2024.

¹⁴⁵ "Industry Focus: How cruise lines decide on destinations for each itinerary," Cruise Arabia & Africa, 2014, <https://cruise-arabia.com/2014/03/30/industry-focus-how-cruise-lines-decide-on-destinations-for-each-itinerary>

would be essential. Providing dedicated tourist police or secured areas could further reassure visitors and cruise lines considering The Gambia as a port of call.

Cruise passengers seek interesting, accessible attractions that can be experienced in a half-day or full-day excursion, such as cultural experiences, visits to historical sites, recreational activities and shopping.

The best cruise ports offer diverse excursion options to cater to different interests. Developing well-organised tours that highlight The Gambia's unique attributes would be essential. These could include cultural performances, historical tours, wildlife encounters, and opportunities to interact with local communities. Ensuring these experiences are authentic yet accessible would differentiate The Gambia from other destinations.

Well-trained, knowledgeable guides who speak English and other relevant languages are essential for providing quality experiences to cruise visitors. Guides should be able to share information about The Gambia's history, culture, wildlife, and traditions in an engaging manner. Similarly, hospitality staff at restaurants, shops, and attractions should provide professional service that meets international standards.

Efficient transportation is critical for cruise tourism. The Gambia would need to ensure adequate transport options (buses, minivans, taxis) to move passengers from the port to various attractions. Vehicles should be well-maintained, air-conditioned, and comfortable. Roads to popular attractions should be in good condition, and appropriate signage should be in place to facilitate movement.

Cruise passengers often seek local culinary experiences and shopping opportunities during port calls. The Gambia would need to ensure that there are restaurants capable of accommodating groups, serving authentic Gambian cuisine as well as international options, and maintaining high standards of food safety and hygiene.

Shopping venues, including craft markets and boutiques, should offer authentic Gambian souvenirs, artwork, textiles, and handicrafts. Clear pricing, quality assurance, and the ability to process credit card payments would enhance the shopping experience. Developing special shopping experiences, such as demonstrations by local artisans, could create memorable experiences for cruise visitors.

Clear signage, information materials, and knowledgeable tourist information staff are important for helping cruise passengers maximise their limited time ashore. Multi-lingual signage and materials would cater to the international nature of cruise ships. Modern amenities such as Wi-Fi access in key tourist areas would be appreciated by cruise visitors who wish to share their experiences or access information online.

Simplified entry procedures are essential for cruise tourism. The Gambia would need to implement cruise-friendly visa policies, such as visa-free entry for cruise passengers or visa-on-arrival arrangements handled by cruise lines. Efficient immigration processing at the port would minimise delays and enhance the visitor experience. Coordination between immigration authorities, port officials, and cruise lines would facilitate smooth entry and exit procedures.

Marketing approach

Events and shows

- **Seatrade Cruise Global:** This is the world's largest annual cruise industry conference and trade show, typically held in Florida (Miami/Fort Lauderdale).

- **International Cruise Summit (ICS):** Held annually in Madrid, this conference brings together industry leaders to discuss cruise development, particularly in Europe.

Publications and Media

- **Cruise Industry News (CIN) and Seatrade Cruise Review/News:** These leading industry news sources are widely read by cruise professionals.
- **Cruise Critic:** This influential website combines editorial content with a community forum.
- **Porthole Cruise Magazine, Cruise Passenger, and World of Cruising:** These consumer-focused cruise publications reach enthusiasts who actively plan future cruises.
- **Travel Trade Publications:** Magazines like **Travel Weekly** (US and UK editions) have dedicated cruise sections and reach travel agents who influence cruise bookings.
- **General Travel and Lifestyle Media:** Publications like **National Geographic Traveller, Conde Nast Traveler, and AFAR** occasionally feature cruise travel, particularly expedition and culturally immersive experiences.

Online Forums

- **Cruise Critic Forums:** As the largest cruise community in the world, with more than six million monthly visitors¹⁴⁶, Cruise Critic's forums are incredibly influential.
- **Reddit Communities:** Subreddits like r/Cruise and r/Cruises attract a younger demographic interested in cruise travel.
- **Facebook Groups:** Numerous cruise-focused Facebook groups exist, including general cruise enthusiast groups and those dedicated to specific cruise lines or regions.
- **TripAdvisor:** The Gambia should ensure its attractions, tours, and experiences are well-represented on TripAdvisor, which many cruise passengers consult when planning shore activities.
- **Cruise Blogs and Vlogs:** Engaging with influential cruise bloggers and vloggers could help raise awareness of The Gambia as a cruise destination.

Associations and Clubs

- **Cruise Lines International Association (CLIA):** As the world's largest cruise industry trade association, representing over 95% of global cruise capacity through its 50+ member cruise lines¹⁴⁷.

Tour Operators

- **Specialist Shore Excursion Providers:** Companies like **Intercruises, Shorex, and Excursions Ltd.** develop and operate shore excursions for multiple cruise lines.
- **Expedition Cruise Operators:** Companies like **Ponant, Silversea Expeditions, and Scenic** specialise in small-ship expedition cruising to less-visited destinations.

¹⁴⁶ "Cruise Critic Media Outlet," Muck Rack, <https://muckrack.com/media-outlet/cruisecritic-2>

¹⁴⁷ "Cruise Lines International Association," Wikipedia, https://en.wikipedia.org/wiki/Cruise_Lines_International_Association

Regional MICE market

Market segment description and profile

West Africa's outbound MICE market is dominated by a few large economies. Nigeria – the region's most populous country and biggest economy – is a major source of business travel in Africa¹⁴⁸ Ghana has also emerged as a hub, with Accra becoming a leading business tourism destination in West Africa.¹⁴⁹ Neighbouring Senegal (especially Dakar) and Côte d'Ivoire (Abidjan) generate significant conference travel, particularly for Francophone events.¹⁵⁰

In The Gambia's tourism planning, Nigeria and Senegal are explicitly targeted as high-potential "non-traditional" markets for growth.¹⁵¹ Notably, regional integration allows visa-free movement for ECOWAS nationals, so West African business travellers can visit The Gambia with minimal formalities – a key advantage over intercontinental trips.

West African business travellers tend to be experienced professionals in their 30s to 50s, often mid- to senior-level managers or officials. Many hold positions in large companies or government agencies that sponsor their travel. For instance, in Ghana nearly 30% of international visitors in 2021 were travelling on business¹⁵² – reflecting the high share of corporate and official travel in the region.

Spending patterns for these travellers are shaped by corporate policies – many have their flights and hotels paid by employers or event organisers. As a result, they often fly in premium cabins and stay at business-grade hotels, especially higher-ranking executives. However, cost sensitivity is still important for many African organisations, so value for money is a key motivation in choosing MICE destinations.

A further market for consideration is the West African weddings market. Nigerian weddings are elaborate affairs deeply rooted in cultural significance and varying considerably across different ethnic groups. For instance, Igbo traditional weddings (Igba Nkwu) involve intricate rituals and gift exchanges, while Hausa weddings incorporate Islamic traditions with the Fatimah ceremony and Walimah reception featuring music, food, and dance. Yoruba weddings are known for elaborate customs guided by an Alaga (master of ceremonies) who leads proceedings with songs and prayers.

Ghanaian weddings are similarly significant cultural events with traditions varying across ethnic groups. Among the Senufo people, weddings are primarily female affairs with ritual ceremonies in sacred groves followed by week-long celebrations. These culturally rich celebration patterns present opportunities for The Gambia to develop specialised hosting capabilities that respect and enhance traditional elements while offering a distinctive destination setting.

¹⁴⁸ "The Gambia targets African tourists for more sustainable growth", UNCTAD, available at : <https://unctad.org/es/isar/news/gambia-targets-african-tourists-more-sustainable-growth#:~:text=African%20tourists%20are%20also%20a,while%20Nigerians%20continued%20to%20visit>

¹⁴⁹ "Ghana's tourism sector focusing on diaspora and business travel", Oxford Business Group, available at : <https://oxfordbusinessgroup.com/reports/ghana/2024-report/tourism/destination-of-choice-sector-growth-is-being-driven-by-diversification-business-travel-and-strategies-to-attract-the-diaspora-population-overview/#:~:text=match%20at%20L304%20capital%20city,the%20needs%20of%20business%20tourism>

¹⁵⁰ "Business and MICE Tourism: Ghana's Post-COVID Economic Recovery Vaccine", B&FT Online, available at: <https://thebftonline.com/2021/11/19/business-and-mice-tourism-ghanas-post-covid-economic-recovery-vaccine/#:~:text=tourists%20in%20Ghana%20regarding%20their,Gambia%20in%20our%20competitive%20set>

¹⁵¹ Tourist Arrivals The Gambia, GT Board, available at: https://visitthegambia.com/?page_id=5318#:~:text=,Senegal

¹⁵² Ibid

Several factors influence why West African business travellers (and their organisations) pick one MICE destination over another:

- **Cost-effectiveness** – Budget constraints mean destinations offering affordable venue packages and hotels often win out. The Gambia has an edge here, being rated one of the most price-competitive travel markets globally.¹⁵³
- **Accessibility** – Easy flight connectivity and short travel times are critical. Destinations with direct flights from multiple West African cities or good regional airline links (like Accra or Dakar) are preferred. Poor air connections can deter delegates, as Africa’s fragmented air network is a known challenge.¹⁵⁴
- **Facilities and service quality** – Corporates seek locations with modern convention infrastructure, reliable power/internet, and professional services.
- **Language and cultural affinity** – West Africa’s Anglophone countries often favour English-speaking destinations (The Gambia or Ghana) for ease of communication, whereas Francophone organisations may lean toward Senegal or Côte d’Ivoire. The Gambia’s English-speaking environment is a draw for regional companies from Nigeria or Ghana.
- **Corporate and policy considerations** – Sometimes multinationals rotate annual meetings among countries for exposure or have regional HQ locations that influence venue choice. Safety and political stability are underlying considerations – firms need to be confident in a destination’s security and governance. In sum, West African MICE travellers are looking for convenience, affordability, and a conducive business environment when deciding where to meet.

Regional MICE travellers in The Gambia

In the past five years The Gambia has hosted several high-profile business events that attracted West African delegates. For example, in 2018–19 the Gambia Chamber of Commerce and Industry (GCCCI) Trade Fair in Bakau grew into a major regional exhibition – featuring exhibitors from Mali, Senegal, and other ECOWAS countries alongside Gambian businesses.¹⁵⁵ In 2019, Banjul was the venue for the 32nd Intermodal Africa Conference & Exhibition, a continental shipping and logistics forum that drew 200+ delegates including port officials and maritime companies from across West Africa.¹⁵⁶

The Gambia’s new international conference centre (completed in 2020) quickly became a magnet for regional gatherings: it hosted the West African Youth Conference on Disaster Risk Reduction in 2021 (an ECOWAS-wide youth and policy forum)¹⁵⁷ and a session of the UN Economic Commission for Africa

¹⁵³ Ibid

¹⁵⁴ Why Africa loses out on MICE business to rest of the world, The Sunday Standard, available at : <https://www.standardmedia.co.ke/business/article/2001513153/why-africa-loses-out-on-mice-business-to-rest-of-the-world#:~:text=Poor%20infrastructure%20development%2C%20fragmented%20marketing,MICE%29%20market%20in%20Africa>

¹⁵⁵ Gambia: GCCCI to Hold Trade Fair, AllAfrica, available at: <https://allafrica.com/stories/200712030510.html#:~:text=Gambia%3A%20GCCCI%20to%20Hold%20Trade,in%20fashion%20and%20design>

¹⁵⁶ GPA host 32nd Intermodal Africa Conference and Exhibition featuring 30 speakers, 20 companies & 200 delegates from across the world, Gambia Ports, <https://gambiaports.gm/2024/11/28/gpa-host-32nd-intermodal-africa-conference-and-exhibition-featuring-30-speakers-20-companies-200-delegates-from-across-the-world/#:~:text=GPA%20HOST%2032ND%20INTERMODAL%20AFRICA,DELEGATES%20FROM%20ACROSS%20THE%20WORLD>

¹⁵⁷ The Gambia Hosts Maiden West African Youth Conference on Disaster Risk Reduction, AskanWi, available at : <https://www.askanwi.com/news/gambia-hosts-maiden-west-african-youth-conference-on-disaster-risk-reduction#:~:text=,International%20Conference%20Center%20in>

(UNECA) – 24th Meeting of the Intergovernmental Committee of Experts for West Africa in 2022,¹⁵⁸ where ministers and experts from 15 West African states convened to discuss development trends.

Most recently, The Gambia was the proud host of the 15th OIC Summit (Organisation of Islamic Cooperation) in 2024, welcoming delegations from several West African OIC member states (Nigeria, Senegal, Niger, etc.) among the 57 nations attending.¹⁵⁹ While the OIC Summit is global, its successful organisation put The Gambia on the map as a capable MICE host for large-scale events.

Within West Africa's MICE landscape, The Gambia is positioning itself as a boutique but cost-competitive destination. It cannot match the scale of larger countries like Nigeria or Ghana in terms of number of events, but it competes on quality, affordability, and ease.

Compared to Ghana, which now has a dedicated MICE bureau and heavy hotel investment, The Gambia offers a quieter alternative – with new facilities but less congestion. Against Nigeria, The Gambia benefits from a more relaxed environment; while Lagos or Abuja host many big conferences, international attendees sometimes face visa hassles or security concerns there.

Senegal (Dakar) is a strong competitor especially for Francophone events – it has a new conference centre (Abdou Diouf CIC) and better flight connectivity than Banjul. However, The Gambia leverages its English language, beach resorts, and the novelty of a smaller destination to carve out a niche.

Nigeria and Ghana share historical, cultural, and economic ties with The Gambia as fellow West African nations. All three countries were British colonies, share membership in ECOWAS (Economic Community of West African States), and have cultural similarities that facilitate regional tourism development. This regional affinity creates natural opportunities for increasing the flow of MICE and celebration tourism between these markets.

The country's recent infrastructure investments, including the US\$50 million SDKJ International Conference Centre, further position it to capitalise on the expanding MICE market from these important West African economies.¹⁶⁰ Nigerian travellers already demonstrate established patterns of visitation to The Gambia, including for MICE purposes such as the Annual Insurance Convergence.

The relative proximity of The Gambia to these markets (with direct flight connections to Nigeria and connections via Dakar to Ghana) creates logistical advantages compared to more distant destinations. As West African businesses seek new regional venues for meetings and conferences, The Gambia can position itself as offering a fresh alternative to more established destinations, combining professional facilities with a distinctive cultural environment and leisure opportunities.

The Gambia's beautiful coastal settings, distinctive cultural backdrop, and developing luxury hospitality sector position it well as a destination for celebratory events. Compared to domestic venues in Nigeria and Ghana (particularly in congested urban centres), The Gambia can offer

¹⁵⁸ ECA and the Government of The Gambia organize the 24th Session of the Intergovernmental Committee of Senior Officials and Experts for West Africa, ECA, available at : <https://www.uneca.org/stories/eca-and-the-government-of-the-gambia-organize-the-24th-session-of-the-intergovernmental#:~:text=ECA%20and%20the%20Government%20of,development%20of%20West%20African%20countries>

¹⁵⁹ OIC Islamic Summit Issues Banjul Declaration, Saudi Press Agency, available at: <https://www.spa.gov.sa/en/N2096723>

¹⁶⁰ The Gambia: Unlocking Untapped Potential Amidst Africa's Tourism Resurgence," The Point Gambia, 2025, <https://thepoint.gm/africa/gambia/opinion/economywatch-with-osman-kargbo-and-tedla-e-khan-the-gambia-unlocking-untapped-potential-amidst-africas-tourism-resurgence>.

more serene and photogenic settings at competitive prices. The combination of exotic location with sufficient cultural familiarity to accommodate specific traditions creates a unique value proposition for celebration planners seeking something special yet accessible.

General Travel Behaviour

West African MICE travellers use a mix of booking channels, often depending on their company's resources. Large organisations typically rely on corporate travel agencies or in-house travel managers to arrange flights, hotels, and conference registration for their delegations. This means many bookings are centralised and pre-paid as part of a group package.

On the other hand, smaller businesses or individual attendees sometimes book independently – they may use online booking sites or contact hotels/event organisers directly.

The rise of user-friendly booking platforms has enabled more West African professionals to self-book regional trips, especially when traveling alone to, say, a trade fair. However, even in those cases, referrals and local contacts play a role.

Short lead times are common – many West African delegates confirm attendance and book travel only a few weeks before an event, rather than months ahead, due to fluid business schedules and waiting on approvals.

MICE trips from West Africa to The Gambia are typically short stays focused around the event schedule. The average trip lasts about 3 to 5 days. For instance, a delegate attending a 2-day conference might arrive the day before and depart the day after, totalling 4 days/3 nights. Some corporate groups add an extra leisure day if scheduling allows, but week-long stays are rare unless there's a substantial incentive component.

In terms of expenditure, these travellers tend to spend at mid- to high-end levels. Their major expenses (flights, hotel, conference fees) are often prepaid by the company or host. On the ground, they usually stay in 4-star business hotels or upscale resorts which in The Gambia might cost around \$100–\$150 per night.

They dine mostly in hotel restaurants or per-diem-approved venues – daily meal costs perhaps \$30–\$50. They also use local transport (taxis or hired shuttles) and may spend on incidental entertainment (an evening out for live music, for example).

Corporate travellers generally stick to their allowance, but senior delegates or those on incentive trips might splurge on souvenirs or premium experiences (like a private excursion) if offered. On average, their daily expenditure is higher than that of a backpacker but lower than a luxury leisure tourist.

One advantage of West African MICE travellers is that their visits are less seasonal compared to leisure tourists. Traditional Gambian tourism is highly seasonal (peaking in the dry winter months November–February),¹⁶¹ but business events can occur year-round.

Product Requirements

- West African MICE travellers expect venues that can accommodate their events comfortably and with modern amenities.

¹⁶¹ "The Gambia's tourism sector: Measuring its value chain and exploiting its potential", UNCTAD, available at: https://unctad.org/system/files/non-official-document/aldc2019_gambia_servicestrade_Nyassi_MOTC_en.pdf#:~:text=%EF%81%B6%20The%20tourism%20industry%20in,br eakfast%20accommodation%20in%20a%20hotel

- Comfortable and convenient accommodation is a top priority for MICE travellers. West African delegates typically prefer to stay in business-class hotels that are either at the event venue or within easy reach. Many West African business travellers are quite brand-conscious and security-conscious – they may look for international hotel brands.
- West African travellers also value proximity – heavy traffic is a concern in cities like Lagos or Accra, so they appreciate that in The Gambia most hotels are a short 15- to 20-minute drive from the airport and similarly close to the conference venues.
- Another requirement is catering to dietary preferences: business travellers from the region may have halal requirements (for Muslim delegates) or specific cuisines.
- Networking spaces are a subtle requirement too – hotel lobbies, bars, and restaurants serve as informal meeting points, so properties that provide pleasant common areas (patios, cafés, etc.) get a thumbs up.
- Efficient transportation is essential for business travellers, from the moment they land to their daily movements. West African MICE visitors expect organised airport transfers – typically a pre-arranged hotel shuttle or private car pickup.
- Business travellers require various support services to stay productive and handle work tasks during their trip. One non-negotiable need is reliable Wi-Fi and internet access. West African MICE visitors will expect high-speed Wi-Fi at venues, hotels, and even in transport if possible. The Gambia’s main conference venues and hotels do provide Wi-Fi (often free for guests), though bandwidth can be strained if hundreds of delegates connect at once.
- Audio-visual equipment and technical support are also critical. Events will need projectors, sound systems, video conferencing tools, etc., and technicians on standby. Simultaneous interpretation services are often required for bilingual meetings. Security-wise, secure facilities for meetings are important – delegates want to know that their discussions aren’t subject to interruptions or eavesdropping.
- Wedding and celebration travellers from Nigeria and Ghana require: Flexible venue spaces adaptable to specific cultural traditions; Accommodation for different guest categories (family, friends, VIPs); Specialised catering capabilities for traditional foods and beverages; Photography-friendly settings with distinctive backdrops; Support for cultural elements (music, dance, ceremonies); High-quality decor and ambiance capabilities; Private celebration spaces with exclusivity options; Transportation logistics for moving large groups and Wedding planner coordination services.

How to Market to This Segment

Events and shows

- **Akwaaba African Travel Market (Lagos):** The largest travel expo in West Africa, attracting about 10,000 attendees including corporate travel buyers.
- The Accra Weizo in Ghana is another West African travel forum that focuses on tourism and aviation; it often brings together ECOWAS-region operators and has a MICE discussion segment.
- In Francophone West Africa, the Salon International du Tourisme d’Abidjan (SITA) in Côte d’Ivoire is arguably the region’s biggest tourism trade fair.

Publications and media

- **Business and industry publications in West Africa such as BusinessDay Nigeria, The Business & Financial Times, Jeune Afrique,**

- **Travel trade magazines which may include a component of MICE coverage such as VoyagesAfriq, ATQ News (Africa Travel Quarterly)**
- **Lifestyle and niche publications such as Bella Naija Weddings, Genevieve Magazine, Wedding Digest Naija, Ghana Wedding Journal:** Publication focused on Ghanaian weddings

Associations

- National chambers of commerce and industry associations such as the Federation of West African Chambers of Commerce and Industry (FEWACCI), the NACCIMA (Nigerian Association of Chambers of Commerce, Industry, Mines and Agriculture), the Ghana National Chamber of Commerce, the West African Bankers' Association, and the African Insurance Organization.
- Trade promotion organisations like WAIPA (West Africa Investment Promotion Agencies network).

Travel Trade

- Corporate Travel Agencies and MICE-Focused Event Organisers such as Touchdown Travels, Quantum Travels, HRG Nigeria (now American Express GBT), Stellar Travel, Satguru Travel.
- PCOs like ICSA Events (Nigeria), OSH Events (Ghana), Montgomery Events, Informa Markets.

Table: Market Segmentation Summary

Segment	Key experiences	Key message	Profile and characteristics	Behaviour	How best to reach?
<i>Soft exploration</i>	All-inclusive and self-catering beach holidays, family-friendly resorts, relaxation and wellness retreats, water sports (diving, surfing, snorkelling), wildlife experiences, cultural and heritage tours, eco-friendly and sustainable travel, local culinary exploration, music and gastronomic festivals	Hassle-free, well-rounded holidays blending relaxation, adventure, and cultural experiences; a safe and welcoming destination for families and couples; authentic and immersive travel that supports local communities and sustainability	Families, retirees, middle-income travellers from UK & Germany seeking familiar, stress-free holidays; millennials, Gen Z, and affluent professionals interested in meaningful, flexible, and sustainable experiences; travellers who appreciate a mix of relaxation, light adventure, and cultural immersion	Seasonal travel during European winter months, preference for pre-packaged experiences but with flexibility, interest in eco-friendly accommodations and responsible tourism, engagement with local food and culture, social media-active, using online research and reviews to inform travel decisions	Travel trade shows (WTM London, ITB Berlin), charter tour operators (TUI, Jet2Holidays, Corendon), sustainable and experiential travel platforms, partnerships with cultural and wellness influencers, advertising in travel trade and lifestyle media, targeted online campaigns on travel review platforms and social media
<i>Intrepid Explorers</i>	Off-the-beaten-path travel, immersive cultural encounters, adventure tourism (hard & soft adventures), wildlife safaris, historical and heritage sites, eco-tourism, river exploration, local culinary experiences, community-based tourism, sustainable and responsible travel	Uncharted adventures with deep cultural engagement, transformative travel that challenges and inspires, eco-conscious and sustainable experiences, meaningful local connections beyond traditional tourism	Diverse travellers aged 30-50 with financial stability, younger explorers (<30) seeking adrenaline-fuelled challenges, seasoned travellers (>50) desiring balanced adventure with cultural depth, all motivated by exploration, personal growth, and sustainability	Preference for flexible, real-time trip planning, extensive research through travel blogs and social media, embrace uncertainty and adaptability, seek cultural immersion and authentic experiences, prioritise sustainable tourism, prefer small group and customisable adventure itineraries	Adventure and cultural travel media (National Geographic Traveller, Wanderlust, Outside Magazine), digital influencers, online travel forums (Reddit, Lonely Planet Thorn Tree), adventure travel trade events (Experience Africa, ATTA events), niche tour operators (Intrepid Travel, G Adventures, Exodus Travels) CRM – return visitors higher probability <ul style="list-style-type: none"> ▪ High Internet exposure

Segment	Key experiences	Key message	Profile and characteristics	Behaviour	How best to reach?
<i>Eco-tourists</i>	Nature-based travel in diverse ecosystems (wetlands, forests, coastal areas), wildlife and birdwatching, sustainable adventure activities (hiking, kayaking, safaris), community-based conservation projects, voluntourism, immersive cultural exchanges, eco-lodges and responsible travel accommodations, photography and nature documentation, environmental education experiences	Discover The Gambia's rich biodiversity and community-driven conservation efforts, travel with purpose while supporting local sustainability, immerse yourself in authentic cultural and ecological experiences that contribute to environmental protection	Environmentally conscious travellers who prioritise sustainability, deep cultural engagement, and responsible tourism; includes nature enthusiasts, conservationists, birdwatchers, adventure travellers, and voluntourists; typically well-educated, financially stable, and willing to pay for authentic and ethical travel experiences	Conducts extensive research on sustainability credentials, seeks meaningful and reciprocal cultural exchanges, willing to invest in eco-friendly and locally-driven experiences, prioritises environmental education and conservation efforts, embraces off-the-grid, non-standardised travel with flexibility and adaptability	Sustainable travel media (National Geographic Traveller, BBC Earth, Lonely Planet), conservation and environmental platforms, eco-tourism trade events, birdwatching and photography communities, voluntourism networks, adventure and responsible travel operators
<i>Outdoor Active and Adventure Tourism</i>	Water sports, cycling, hiking; nature immersion with cultural exchange and personal transformation.	Experience authentic natural beauty and rich local culture in a compact, accessible destination with sustainable adventures.	Diverse age groups (30–50, 51–60, younger millennials/Gen Z); environmentally and socially conscious; seeking quality family time and authentic experiences.	Plan extensively via online research and word-of-mouth; prefer longer stays and shoulder-season travel; lean towards direct bookings and activity-focused spending.	Engage through digital platforms (social media, specialised forums), adventure trade shows, targeted publications, and collaborations with specialised tour operators.
<i>Water-based / Boating Holidays and Excursions</i>	Intimate river cruising with educational shore excursions, historical tours and scenic landscapes.	Discover the untapped charm of the Gambia River – where authentic culture meets luxury cruising in a relaxed, yet refined setting.	Mix of younger and older travellers; high disposable income, well-educated professionals; keen on history, culture, nature and gastronomy.	Extensive pre-trip research; preference for organised, detail-rich itineraries and integrated experiences; willing to invest in premium, hassle-free journeys.	Through international cruise trade shows, specialised cruise media and forums, targeted publications, and established tour operators.

Segment	Key experiences	Key message	Profile and characteristics	Behaviour	How best to reach?
<i>SAVE Tourism</i>	Scientific research, academic exchanges, voluntourism, and immersive educational programmes.	Unlock unique, year-round opportunities for research, volunteering, and cultural immersion that empower local communities.	Primarily 18–34-year-olds; well-educated, socially and environmentally conscious; keen on genuine cultural exchange and meaningful impact; tolerant of rustic conditions.	Extended stays focused on purposeful travel; thorough pre-trip research; preference for group experiences in off-the-beaten-path areas; budget-minded yet value-driven spending.	Via academic conferences, volunteer and gap year fairs, specialised online platforms and directories, targeted social media content, and collaborations with research and volunteer organisations.
<i>Religious Tourism</i>	Visiting historical mosques and sacred sites, engaging with local Muslim communities, participating in authentic Islamic traditions, exploring Islamic cultural landmarks, and experiencing spiritual immersion in a country where 97% of the population practices Islam.	The Gambia offers an authentic Islamic environment with rich heritage dating to the 11th century, providing Muslim travellers both spiritual fulfilment and cultural connections in a welcoming, predominantly Muslim nation.	Increasingly comprised of younger travellers seeking immersive experiences for personal growth and cultural heritage connections, with preferences for halal food, prayer facilities, family-oriented accommodations, and culturally sensitive environments.	Muslim travellers typically prefer longer trips (1-2 weeks) allowing for immersive experiences, often travel during religious holidays or in family/large groups, engage in both religious activities and general sightseeing, and are influenced by word-of-mouth recommendations, online platforms, and practical considerations like safety and accessibility.	Target through specialised events (Arabian Travel Market, World Halal Tourism Summit), publications (HalalTrip Magazine, Islamic Tourism Magazine), online forums (Muslim Travel Rocks, Halal Travel Guide Community), Islamic associations, and specialised tour operators (Halal Travel, Muslim Holidays, Crescent Tours) that cater specifically to Muslim travellers.

Segment	Key experiences	Key message	Profile and characteristics	Behaviour	How best to reach?
<i>Cruise Tourism</i>	Cultural immersion through visits to historical sites, wildlife encounters, authentic local culinary experiences, craft markets, cultural performances, beach activities, and community interaction — all packaged as accessible half-day or full-day excursions from the port.	The Gambia offers cruise passengers pristine coastlines, rich cultural heritage, and diverse ecosystems in a stable West African democracy, strategically positioned along repositioning cruise routes with year-round warm weather ideal for European winter escapes.	Diverse audience with average age of 46 (36% under 40), predominantly married (84%), often traveling as couples or in multi-generational groups, relatively affluent (average household income of US\$110,000), well-educated (69% with tertiary education), and seeking multiple destinations in one trip with all-inclusive convenience.	Cruise travellers plan thoroughly (4-6 months ahead), highly influenced by travel advisors (73%), loyal to cruise lines (60% rebook with same line), have limited port time (8-10 hours), often book organized shore excursions, and seek authentic local experiences while valuing safety, efficiency, and convenience.	Target through industry events (Seatrade Cruise Global, International Cruise Summit), publications (Cruise Industry News, Cruise Critic), online forums (Cruise Critic Forums, Reddit's r/Cruise), cruise associations (CLIA), and shore excursion providers (Intercruises, Shorex), while developing cruise-friendly infrastructure and policies.
<i>Regional MICE</i>	Professional conference facilities with reliable technical infrastructure, cultural affinity with English-speaking environment, cost-competitive accommodation and services, networking spaces, beautiful coastal settings for celebrations, ease of regional travel with visa-free movement for ECOWAS nationals, and proximity to major West African business hubs.	The Gambia offers West African businesses and celebration planners a boutique, cost-effective alternative to congested urban centres, combining modern infrastructure (including the new US\$50 million SDKJ International Conference Centre) with a relaxed beach destination environment, English-language advantage, and cultural familiarity in a politically stable setting.	Experienced professionals in their 30s-50s, typically mid to senior-level managers or officials from large companies and government agencies, whose travel is often sponsored by employers, with spending patterns shaped by corporate policies allowing for business-grade accommodations and premium travel, alongside a growing market for elaborate West African celebrations like Nigerian and Ghanaian weddings.	Bookings often centralized through corporate travel agencies or in-house travel managers for large organisations, with short lead times (few weeks rather than months), typical stays of 3-5 days focused around event schedules, year-round travel patterns less affected by seasonality, and higher daily expenditure than leisure tourists with spending on quality accommodations, dining, and business services.	Target through West African business events (Akwaaba African Travel Market in Lagos, Accra Weizo in Ghana), business publications (BusinessDay Nigeria, The Business & Financial Times), regional associations (Federation of West African Chambers of Commerce, national chambers), wedding publications (Bella Naija Weddings, Ghana Wedding Journal), and corporate travel agencies (Touchdown Travels, HRG Nigeria/American Express GBT).

A3. Strategic evaluation of source markets and segments

Criteria	% Weight	UK	Germany	Benelux	Sweden	Rest Scandinavia	France	Spain	Portugal	USA (Roots)	Poland/ Chzec	Saudi Arabia	India	China	Nigeria (MICE)
Value Potential															
Total Outbound Travel Expenditure (UNWTO)	30	90	90	60	15	30	60	30	15	120	15	30	30	150	6
Average growth In tourism expnditure last 10 years (UNWTO)	30	120	90	60	0	15	60	120	120	120	15	60	150	90	0
Potential for All Year Travel to Gambia (GT Board Data)	25	50	50	50	25	25	50	25	25	75	25	100	75	25	125
Propensity to Explore (Desk research)	15	75	75	75	75	75	75	60	45	60	30	15	45	15	30
Sub Total		335	305	245	115	145	245	235	205	375	85	205	300	280	161
Ease															
Shortest fly time to Gambia (Online survey)	30	150	120	150	90	60	120	120	150	60	90	90	30	30	150
Current Gambia Leisure/MICE Market Share & Affinity (GT Board)	40	200	80	200	80	80	40	120	80	80	40	0	0	0	160
Tour operator coverage (Consultant Research)	20	100	60	80	60	60	40	40	40	20	40	20	20	20	40
Travel expenditure/capita population (UNWTO)	10	40	40	40	40	40	30	20	20	20	10	30	10	10	5
Sub Total		490	300	470	270	240	230	300	290	180	180	140	60	60	355

A4. Market segment evaluation

Cluster & Approach	Segments	Motivation
<p>Higher Readiness; BUT Lower Value Potential</p> <p>Segments which the Gambia is ready to attract with relative ease, but which offer lower growth and value adding potential</p> <p>Maintain and Leverage Value</p> <p>Maintain these segments as the backbone of the tourism industry and leverage as much value from them</p> <p>Apply 40% of resources</p> <p>Engagements and joint marketing with established tour operators</p> <p>Expansion of offers and packages to derive increases spend</p> <p>Special offers during shoulder season periods to stretch the season</p>	<p>Package beach holidaymakers</p>	<p>Ready and Easy to Attract</p> <ul style="list-style-type: none"> - By far the largest travel segment in The Gambia and the segment on which 90% of The Gambia's industry is built - The Gambia is relatively well known in this segment and geared to service it <p>Limited Growth and Value Potential</p> <ul style="list-style-type: none"> - Highly price competitive - Market has been struggling to recover - High leakage and low filter down effect - Highly seasonal - Concentrated in TDA and low spread
	<p>Domestic and regional leisure breaks</p>	<p>Ready and Easy to Attract</p> <ul style="list-style-type: none"> - Adequate services and facilities to serve them - Substantial knowledge/awareness of tourism opportunities - Relatively easy access <p>Limited Growth and Value Potential</p> <ul style="list-style-type: none"> - Limited product match with market needs & high competition in the region - Low average per capita income and spend - Concentrated in TDA and low spread
	<p>Cruise travellers</p>	<p>Relatively Ready and Easy to Attract</p> <ul style="list-style-type: none"> - The Gambia already attracts a substantial share of North-South cruises along the coast. - However, harbour and visitor facilities are not well developed for passenger cruises. <p>Limited Growth and Value Potential</p>

Cluster & Approach	Segments	Motivation
		<ul style="list-style-type: none"> - Support for community-based tourism - Potential to be less seasonal
	Intrepid Explorers	<p>Relatively Ready and Easy to Attract</p> <ul style="list-style-type: none"> - Various CBT initiatives e.g. Ninka Nanaka Trail already established - Current upriver tourism facilities suitable for the segments - Could travel on charter and scheduled flights <p>Good Growth and Value Potential</p> <ul style="list-style-type: none"> - In line with global trends towards sustainable tourism - Able to spread value beyond coast - Higher local spend - Support for community-based tourism - Potential to be less seasonal
<p>Invest Higher Value Potential BUT Lower Readiness</p> <p>Segments that offer growth potential, but which The Gambia is not yet well-equipped to receive and attract</p> <p>in and grow these segments over time, to achieve greater diversification over the next 5 years</p> <p>Apply 20% of resources</p> <p>Expand media exposure</p> <p>Establish strong tour operator and conference intermediary relationships</p>	Tailored Explorers	<p>Less Ready and More Difficult to Attract</p> <ul style="list-style-type: none"> - The Gambia perceived as sun, sea and sand – low awareness high value experiential destination - High quality tourism facilities and experiences are currently limited for the segment, even though numbers are relatively small (couples and families) - High quality river transport is limited - Limited scheduled flight options <p>Good Growth and Value Potential</p> <ul style="list-style-type: none"> - In line with global trends towards experiential tourism and flexible travel - Less price competitive - Higher local spend - Potential to be less seasonal - Able to spread value beyond coast

Cluster & Approach	Segments	Motivation
Targeted digital marketing	MICE & Roots Delegates	<p>Less Ready and More Difficult to Attract</p> <ul style="list-style-type: none"> - The Gambia perceived as sun, sea and sand – low awareness as a MICE destination - Few high quality hotels that are suitable for the segment - Although International Conference Centre is an advantage, human resources and skills in MICE are limited - Limited scheduled flight options <p>Good Growth and Value Potential</p> <ul style="list-style-type: none"> - High quality International Conference Centre built - Less seasonal than leisure - Higher spend - Pre and post tourism can spread tourism

Appendix B: Digital Marketing Strategy

As detailed in this document previously, The Gambia is shifting away from its traditional reliance on sun, sea, and sand tourism, which has primarily attracted price-sensitive older travellers from the UK, the Netherlands, and Scandinavia. To diversify its tourism sector and remain competitive, the country is planning to reposition itself as a destination for **river-based experiences, culture, history and adventure**.

Global travel trends show a rising demand for experiential, sustainable tourism, particularly among younger, adventure-seeking travellers. Additionally, the African diaspora and regional West African markets are emerging as key segments, presenting new opportunities for growth. The Gambia's tourism sector must now appeal to travellers who prioritise **authenticity, sustainability, and unique experiences**.

A **robust digital marketing strategy** is crucial for The Gambia's tourism repositioning, ensuring it effectively reaches younger, experience-driven travellers, the African diaspora, and regional West African markets. As these audiences rely heavily on digital channels—social media, search engines, and influencer content—to discover destinations, a strong online presence is essential to drive awareness and engagement.

By leveraging **targeted content marketing, SEO, social media, and data-driven advertising**, The Gambia can showcase its **river-based experiences, culture, and adventure offerings** to the right audiences. Digital marketing enables precise audience targeting, real-time performance tracking, and continuous optimisation, maximising return on investment. A full-funnel approach will not only boost **visibility and conversions** but also build long-term traveller loyalty, ensuring sustainable tourism growth.

The **FindMySmile** campaign seamlessly integrates into this strategy by providing an emotive and aspirational narrative, reinforcing The Gambia's new identity as a destination where travellers can rediscover joy and connection through cultural and adventure experiences.

The Gambia's digital marketing strategy will focus on:

1. **Repositioning The Gambia** as a hub for cultural and adventure-based tourism.
2. **Expanding target markets** beyond all-inclusive travellers from Northern Europe:
 - **Younger travellers (30s and early 40s)** from existing markets and new European targets like Spain, Germany, and France.
 - **Diaspora communities in the US and Europe** seeking cultural and heritage experiences.
 - **Adventurous US travellers** interested in sustainable, off-the-beaten-path destinations.
 - **Regional West African visitors**, particularly Nigerians, for events such as weddings and conferences.
3. **Building a strong digital presence** through content marketing, social media, search engine marketing (SEM), influencer outreach, and email campaigns.
4. **Driving conversions across the traveller journey**, from awareness to booking and retention.
5. **Promoting The Gambia as a premier event and conference destination** for regional West African markets.

This three-year strategy follows a structured digital funnel approach—spanning **awareness, engagement, conversion, and retention**—to drive sustainable tourism growth while refining tactics based on market insights and performance analytics.

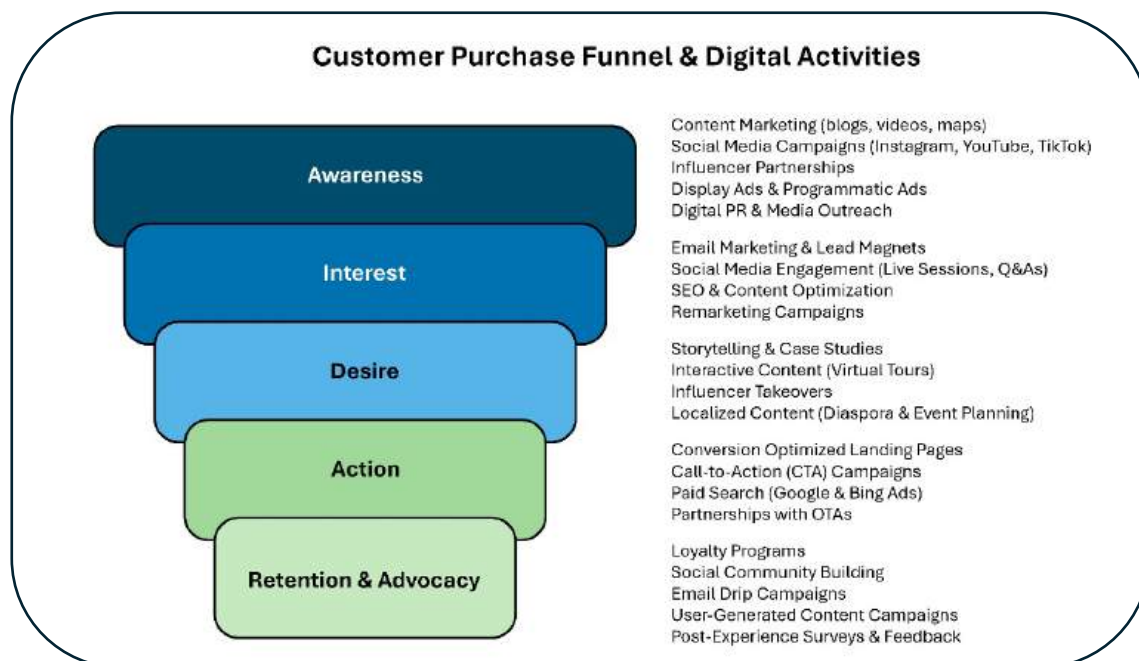
Customer Purchase Funnel: Digital Activities Across Stages

The **customer purchase funnel** is a strategic framework that maps a traveller’s journey from discovering a destination to booking a trip and becoming a loyal advocate. It consists of five key stages—**Awareness, Interest, Desire, Action, and Retention & Advocacy**—each representing a critical step in the decision-making process. By aligning digital marketing efforts with these stages, we can effectively guide potential visitors through their journey, ensuring that the right message reaches them at the right time.

Applying the **customer funnel model** to The Gambia’s digital marketing strategy ensures a structured, data-driven approach to attracting and converting high-value travellers. Instead of relying on one-size-fits-all promotions, this framework allows us to **tailor content, advertising, and engagement tactics** to match the needs of different traveller segments at each stage. For instance, **social media storytelling and influencer partnerships** will create **awareness**, while **targeted email campaigns and interactive content** will nurture **interest and desire**. Optimised landing pages and paid search ads will drive **action**, and **loyalty programs and user-generated content** will sustain long-term engagement.

By following this roadmap, The Gambia can **increase visibility, enhance traveller engagement, improve conversion rates, and build lasting relationships**, ensuring sustainable tourism growth and a strong digital presence.

Below to elaborate on the proposed digital marketing activities linked to each stage:



Awareness

Objective: Introduce The Gambia’s evolved brand identity to new and existing audiences and position *FindMySmile* as a compelling campaign narrative that aligns with The Gambia’s unique experiences.

- **Content Marketing:** Develop rich storytelling content (blog posts, videos, interactive maps) showcasing the nation’s culture, history, river adventures, and local art.
- **Social Media Campaigns:** Use platforms like Instagram, Facebook, YouTube and TikTok, to share immersive visuals and narratives with #FindMySmile as a unifying theme.
- **Branded Video Content:** Create a “Smile Stories” video series following travellers who experience personal transformations in The Gambia.
- **Influencer Partnerships:** Collaborate with travel influencers, cultural ambassadors, and diaspora figures who can authentically share their experiences.
- **Display Advertising & Programmatic Ads:** Target lookalike audiences in the key markets (UK, Spain, Germany, France, US, and Nigeria) with visually engaging ads.
- **Public Relations (Digital):** Engage with digital media outlets, travel blogs, and online travel magazines to feature the new narrative.

Interest

Objective: Engage potential travellers and create a desire to learn more about The Gambia.

- **Dedicated *FindMySmile* Microsite:** Feature immersive content such as itineraries, video stories, and experience guides.
- **Email Marketing & Lead Magnets:** Offer downloadable guides (e.g., “Top 10 River Adventures in The Gambia” or “Cultural Treasures of The Gambia”) in exchange for email sign-ups.
- **Social Media Engagement:** Host live sessions, Q&As, and webinars featuring local experts and travel influencers.
- **UGC Activation:** Encourage travellers to share #FindMySmile moments through photos and videos.
- **SEO and Content Optimisation:** Develop long-form articles and optimized landing pages that answer queries about adventure tourism, cultural events, and sustainable travel in The Gambia.
- **Remarketing Campaigns:** Implement remarketing strategies to recapture interest from website visitors who have engaged with the content but not yet converted.

Desire

Objective: Build a strong emotional connection that motivates travellers to consider booking their journey.

- **Storytelling & Case Studies:** Share success stories, user testimonials, and case studies of travellers who have experienced authentic Gambian culture and adventure.
- **Interactive Content:** Introduce interactive elements such as virtual tours of cultural landmarks and river adventures.
- **Influencer Takeovers:** Feature travel creators documenting their experiences through *FindMySmile* stories.

- **Influencer Takeovers:** Let influencers share “a day in the life” experiences showcasing hidden gems in The Gambia.
- **Localized Content:** Develop content tailored to specific segments (e.g., diaspora narratives, event planning guides for Nigerian weddings).

Action

Objective: Convert interested users into actual bookings and inquiries.

- **Conversion Optimized Landing Pages:** Create dedicated pages for booking experiences, events, and tailored packages that speak directly to the interests of the new target audiences.
- **Call-to-Action (CTA) Campaigns:** Use persuasive CTAs in emails, social posts, and website banners that lead to easy booking or inquiry forms.
- **Paid Search (SEM):** Run targeted Google Ads and Bing Ads campaigns using keywords focused on “adventure tourism,” “cultural trips,” “sustainable travel,” and “river adventures.”
- **Partnerships with Online Travel Agencies (OTAs):** Collaborate with niche travel platforms that cater to adventure and cultural travel, offering exclusive packages and promotions.
- **Exclusive Travel Offers:** Introduce themed packages (e.g., “Smile Restoration Retreats”) focusing on wellness, adventure, and culture.

Retention & Advocacy

Objective: Foster long-term relationships, encourage repeat visits, and generate word-of-mouth referrals.

- **Loyalty Programs:** Implement digital loyalty schemes rewarding repeat travellers and referrals.
- **Social Community Building:** Create online forums or social media groups where travellers can share experiences, tips, and reviews.
- **Ambassador Programme:** Identify passionate visitors and influencers as *FindMySmile* advocates.
- **Email Drip Campaigns:** Engage past visitors with personalized content and offers, such as anniversary discounts, updates on new adventures, or cultural events.
- **User-Generated Content Campaigns:** Encourage travellers to share their experiences on social media using dedicated hashtags and rewards for top posts.
- **Post-Experience Surveys & Feedback Loops:** Use digital tools to gather feedback, ensuring that continuous improvements are communicated back to potential customers as testimonials and success stories.

Stage-by-Stage Strategy

The digital marketing strategy will roll out over three stages, with each phase building on the insights and successes of the previous year.

Stage 1: Brand Repositioning and Awareness Building

Objective: Lay the foundation for the new brand identity and capture initial interest among diversified markets.

Branding and Messaging

- **Rebrand Identity:**

- Using the refreshed visual identity, that reflects The Gambia’s rich cultural heritage and adventurous spirit, emphasize key messaging points around culture, history, adventure, and river-based experiences.

- **Content Audit and Strategy:**

- Audit existing digital assets and identify gaps in content that align with the new narrative.
- Create a content calendar that prioritizes storytelling through blog posts, videos, and interactive media.

- **Market-Specific Messaging:**

- Tailor messages for each target segment—adventurous younger travellers in traditional markets, European travellers (Spain, Germany, France), the US diaspora, and West African event planners.

Digital Infrastructure and Analytics Setup

- **Website Revamp:**

- Review and enrich the website with additional audio/visual and interactive content.
- Build dedicated landing pages for each target segment, integrated with clear CTAs for booking and inquiries.

- **Analytics and CRM Integration:**

- Set up robust tracking systems using tools such as Google Analytics, social media analytics, and CRM systems to capture visitor behaviour and engagement across the funnel.
- Establish KPIs (e.g., website traffic, conversion rates, bounce rates) and dashboards to monitor progress.

Content and Social Media Initiatives

- **Content Production:**

- Launch a series of blog posts, short documentaries, and social media videos that introduce The Gambia’s unique cultural and adventure offerings.
- Create visual storytelling pieces featuring river cruises, local festivals, and interviews with community leaders.

- **Social Media Activation:**

- Initiate a multi-platform campaign focusing on Instagram, Facebook, YouTube and TikTok to reach younger travellers with immersive, high-quality visuals.
- Use targeted hashtags (e.g., #DiscoverGambia, #GambiaAdventures, #CulturalGambia) and schedule regular posts and live sessions.

Influencer and Partnership Outreach

- **Influencer Marketing:**

- Identify and onboard travel influencers, cultural ambassadors, and diaspora voices with substantial followings in target markets.
- Develop influencer packages that include sponsored trips, content collaborations, and co-hosted events.
 - **Strategic Partnerships:**
- Initiate discussions with international OTAs for featured placements and co-branded promotions.

Paid Media and PR

- **Paid Search & Social Advertising:**
- Launch initial SEM campaigns targeting keywords around “adventure tourism in The Gambia” and “cultural experiences in West Africa.”
- Utilize paid social media ads to boost content reach, particularly in emerging markets such as Spain, Germany, and the US.
 - **Digital PR:**
- Secure placements in high-authority travel sites and digital publications that cater to cultural, adventure, and sustainable tourism narratives.

Metrics and Review

- **Monitoring:**
- Track key metrics monthly to assess campaign performance.
- Hold monthly review meetings to optimize creative and messaging based on real-time feedback.

Outcome Expected by End of Stage 1:

A strong foundation in rebranding, with increased awareness and initial engagement from target markets. Established digital channels and tracking mechanisms that will inform further phases.

Stage 2: Engagement, Conversion, and Experience Enhancement

Objective: Deepen audience engagement, improve conversion rates, and showcase authentic experiences that encourage bookings and repeat visits.

Content Evolution and Personalization

- **Dynamic Content Strategy:**
- Expand the content library with immersive, high-quality long-form articles, video series, and interactive virtual tours.
- Implement personalized content recommendations on the website based on visitor interests (e.g., “River Adventures” for adventure seekers, “Cultural Festivals” for diaspora audiences).
 - **User-Generated Content (UGC):**
- Launch a campaign inviting travellers to share their Gambian experiences through photos, stories, and videos using a dedicated hashtag.
- Curate the best UGC to feature on official channels, creating a feedback loop that builds trust and authenticity.

Enhanced Digital Engagement

- **Email Marketing Optimisation:**

- Develop segmented email campaigns targeting different buyer personas (e.g., diaspora families, adventure travellers, event planners).
- Use drip campaigns to nurture leads captured in Year 1, providing exclusive content, promotions, and personalized itineraries.

- **Interactive Social Media Content:**

- Roll out interactive sessions such as live Q&A events, virtual travel planning workshops, and behind-the-scenes looks at local festivals and river expeditions.
- Leverage polls, quizzes, and interactive stories to gather insights into audience preferences.

Conversion-Focused Initiatives

- **Optimized Landing Pages and Booking Funnels:**

- Test and refine landing pages with A/B testing on CTAs, images, and copy tailored to each segment.
- Introduce online enquiry booking processes for tours and accommodation with clear pricing, itineraries, and customer testimonials.

- **Retargeting and Remarketing:**

- Enhance remarketing campaigns using personalized ads and emails to recapture visitors who showed interest but did not convert in Year 1.

- **Promotional Offers and Packages:**

- Develop exclusive packages for early bookings, special events, and diaspora reconnect tours.
- Launch time-sensitive promotions during key cultural or seasonal events.

Paid Media Scaling

- **Expanded SEM and Social Media Ad Campaigns:**

- Increase budgets on channels that performed well in Year 1, and test new ad formats such as video ads and carousel ads on social platforms.
- Utilize lookalike audiences and geo-targeting to refine reach in key markets like Spain, Germany, the US, and Nigeria.

- **Influencer Amplification:**

- Scale influencer partnerships with more prominent figures in the travel and lifestyle sectors, incorporating co-hosted events, exclusive trips, and multi-platform takeovers.

Digital Stakeholder Application Platform

- **Set up digital stakeholder database**

- Allow all tourism stakeholder hotels, restaurants, travel agents and casinos to sign up online and update their database allowing GT BOARD a real-time view of the sector
- Set up online new license application and renewal process for all stakeholders
- Set up on online quality assessment system

Measurement and Optimisation

- **Quarterly Reviews and Adjustments:**

- Conduct quarterly deep-dives into campaign performance, user engagement, conversion rates, and ROI.

- **Customer Feedback Integration:**

- Integrate direct feedback from travellers via surveys and online reviews to iterate on content, service offerings, and digital experiences.

Outcome Expected by End of Stage 2:

A significant uplift in engagement and conversion rates, with an established reputation as a culturally rich, adventurous, and sustainable destination. Increased direct enquiries and higher-quality leads across all digital channels. Improve stakeholder management with multi-functional online database application.

Stage 3: Loyalty, Advocacy, and Market Leadership

Objective: Cement The Gambia's position as a market leader in cultural and adventure tourism, maximize repeat visitation, and build a vibrant community of brand advocates.

Deepening Brand Loyalty

- **Community Building:**

- Establish an online community hub or forum where past and prospective visitors can interact, exchange travel tips, and share stories.

- Host annual digital and in-person meet-ups that further cement the brand's community ethos.

Advocacy and User-Generated Content

- **Ambassador Programs:**

- Identify and nurture brand ambassadors among early adopters, influencers, and diaspora travellers.

- Provide these ambassadors with incentives to generate regular content, testimonials, and referrals.

- **Interactive Storytelling Campaigns:**

- Develop a campaign that invites travellers to chronicle their journeys in The Gambia.

- Feature standout stories on the official website and social channels as case studies and inspiration for new travellers.

Expansion into New Digital Experiences

- **Augmented Reality (AR) and Virtual Reality (VR) Experiences:**

- Invest in AR/VR technologies to offer virtual previews of river adventures, cultural festivals, and historical sites.

- Create immersive experiences that can be shared on social media, driving both interest and engagement.

- **Localised and Multilingual Content:**

- Expand the digital content repository with multilingual resources, catering to non-English speaking segments in Europe and West Africa.
- Develop interactive guides and mobile-friendly content that speaks directly to the needs of international audiences.

Consolidation of Paid and Organic Channels

- **Sustained Paid Media Efforts:**

- Optimize paid search and social advertising to target repeat visitors, leveraging remarketing audiences and data from loyalty programs.
- Experiment with emerging platforms and formats (e.g., podcasts, live streaming) to reach new demographics.

- **SEO and Content Authority:**

- Position The Gambia as a thought leader in sustainable adventure tourism by producing white papers, expert interviews, and hosting webinars.
- Continue refining SEO tactics to ensure that The Gambia consistently ranks highly for cultural, adventure, and event-based travel queries.

Partnerships and Ecosystem Building

- **Deepened Strategic Alliances:**

- Cement long-term partnerships with international travel agencies, cultural organizations, and local stakeholders.
- Co-create signature events (e.g., a “Gambia Cultural Festival” or “River Adventure Week”) that attract global media attention.

- **Offline-Online Integration:**

- Leverage offline events (local festivals, international roadshows, travel expos) to drive online engagement and vice versa.

- **Crisis Management and Resilience:**

- Develop digital crisis management protocols to protect brand reputation in times of external challenges, ensuring rapid response and transparent communication.

Metrics, ROI, and Future Planning

- **Comprehensive ROI Analysis:**

- Adjust budgets and resources based on performance metrics, ensuring sustained high ROI.

- **Future-Proofing the Strategy:**

- Develop a long-term roadmap that identifies emerging trends (e.g., sustainability tech, new social platforms) and plans for further innovation beyond Year 3.
- Continue gathering and analysing consumer insights to remain agile and responsive to shifting market dynamics.

Outcome Expected by End of Stage 3:

The Gambia will emerge as a recognized global destination in sustainable, culturally rich, and adventure tourism. The established digital ecosystem will drive high engagement, conversion,

and loyalty, with brand advocates and community members continuously generating organic buzz and referrals.

Digital Channels and Tactics

Content Marketing

- **Blog and Long-Form Content:**
 - Develop a blog series that covers topics such as “Hidden Cultural Treasures of The Gambia,” “River Adventures: What to Expect,” and “Sustainable Tourism in West Africa.”
 - Use storytelling and SEO best practices to attract organic traffic.
- **Video and Visual Content:**
 - Produce mini-documentaries, vlogs, and live streaming sessions from key cultural events and river tours.
 - Leverage YouTube, Instagram Reels, and TikTok to reach younger demographics.

Social Media Marketing

- **Platform Strategy:**
 - Instagram & TikTok: Focus on visual storytelling, short-form video, and influencer takeovers.
 - Facebook: Use event promotion, community groups, and targeted ads.
- **Engagement Tactics:**
 - Regular posting schedules, interactive stories, contests, and live Q&A sessions with local experts.

Paid Advertising

- **SEM:**
 - Use Google Ads and Bing Ads with keywords relevant to adventure tourism, cultural travel, and sustainable experiences.
- **Social Media Ads:**
 - Target specific demographics and interests across Facebook, Instagram, and emerging platforms.
 - **Display & Programmatic Ads:**
 - Use high-quality visuals to reach lookalike audiences and retarget engaged visitors.

Email and CRM

- **Email Campaigns:**
 - Develop segmented email lists for different audience segments.
 - Use automated drip campaigns to nurture leads through personalized content.
- **CRM Integration:**
 - Utilize data analytics to track user behaviour and refine messaging across the funnel.

Influencer and Partnership Marketing

- **Influencer Engagement:**
 - Work with influencers who align with The Gambia’s new narrative of cultural and adventure travel.

- Coordinate sponsored trips, reviews, and collaborative content.
 - **Partnerships:**
 - Form alliances with travel platforms, local cultural institutions, and event organizers.

Budget, KPIs, and Measurement

Budget Allocation

- **Year 1:**
 - Focus on branding, website redesign, initial content production, and paid media testing.
 - Allocate budget for influencer outreach and strategic partnerships.
- **Year 2:**
 - Increase investment in content personalization, conversion optimisation, and expanded paid media channels.
 - Budget for stakeholder database development, interactive content and event-driven promotions.
- **Year 3:**
 - Allocate funds toward advanced digital experiences (AR/VR), loyalty programs, and community-building initiatives.
 - Increase spend on scaling proven channels and partnerships.

Key Performance Indicators (KPIs)

- **Awareness:**
 - Website traffic, social media reach, impressions, and influencer campaign metrics.
- **Engagement:**
 - Average time on site, bounce rate, social media engagement rates (likes, shares, comments), email open and click-through rates.
- **Conversion:**
 - Enquiry conversion rates, cost-per-acquisition, lead quality, and remarketing ROI.
- **Retention & Advocacy:**
 - Repeat visit rate, UGC volume, referral rates, and net promoter score (NPS).

Reporting and Continuous Improvement

- **Dashboard Reporting:**
 - Develop a centralized dashboard for real-time performance tracking across channels.
- **Quarterly and Annual Reviews:**
 - Conduct in-depth reviews at the end of each quarter to adjust strategies and reallocate budgets as needed.
- **User Feedback:**
 - Incorporate qualitative feedback through surveys, reviews, and focus groups to refine digital experiences.

Conclusion

This three-year digital marketing strategy is a comprehensive plan designed to transform The Gambia's tourism image from a traditional sun, sea, and sand destination to a vibrant, culturally

immersive, and adventurous locale. By rebranding and realigning the digital presence, the plan targets not only the existing markets but also newer segments—young, affluent travellers from Europe and the US, diaspora communities, and regional event planners from West Africa.

By integrating the *FindMySmile* campaign into the broader digital marketing strategy, The Gambia can establish itself as a premier cultural and adventure tourism destination. Through immersive storytelling, digital activations, and influencer collaborations, this strategy will drive awareness, engagement, and long-term visitor loyalty.

Key takeaways include:

- A **full-funnel approach** that integrates awareness, interest, desire, action, and retention activities.
- A **phased strategy** that builds brand equity and engagement in Year 1, deepens conversions in Year 2, and fosters loyalty and advocacy in Year 3.
- **Multi-channel digital tactics** ranging from content marketing and social media to SEM, influencer partnerships, and advanced interactive experiences.
- A focus on **data-driven optimisation** to measure progress and recalibrate strategies based on real-time feedback and evolving market trends.

By consistently delivering compelling digital content, leveraging strategic partnerships, and nurturing a community of engaged travellers, The Gambia will be well positioned to capture a share of the growing market for cultural, adventure, and sustainable tourism. This detailed plan serves as a roadmap for achieving measurable growth in visitor numbers, enhanced brand perception, and a robust digital ecosystem that can adapt to the future needs of a dynamic global tourism market.