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# Ministry of Tourism & Culture The Gambia

*A Business Plan for the Development of  
Tourism 2010*

November 2010



INTERNATIONAL  
LEISURE MANAGEMENT

### Acknowledgements:

We should like to thank the following individuals and entities for their help and support in the creation of this Business Plan for the development of tourism in The Gambia:

The Minister of Tourism and Culture

The Permanent Secretary and Deputy PS of the MoTC

The Director General of the GTA and her staff

The Gambia Civil Aviation Authority

Chairman of the Gambia Hotel Association

Director of Planning Ministry of Economic Planning and Industrial Development

Project Coordinator Enhanced Intergrated Framework Project

This report and its conclusions are based on our knowledge of demand sources, economic and growth data as well as the status of the competitive market at the completion of our fieldwork carried out between May and August 2010. Thus the report does not make provision for any unforeseen rise or decline in local or general economic conditions since that date.

The market conditions, characteristics and estimates of financial performance in this report have been prepared with reference to:

- the performance characteristics of tourist activity in The Gambia, the Region and its source markets; and
- our estimates of the way in which the source markets may be anticipated to develop.

This Business Plan has been prepared to assist you in developing the most appropriate structure, organisation and approach to drive tourism forward within The Gambia, in a sustainable and inclusive manner.

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## EXECUTIVE SUMMARY

- The Ministry of Tourism and Culture (MoTC) held a stakeholders weekend retreat at the end of March 2010 to discuss the way forward for tourism in The Gambia, what its aims and objectives might be and how to take these forward to a successful conclusion. The stakeholders comprised hotel owners and operators, the Gambia Tourism Authority (GTA) and representatives from other tourism institutions, tour operators and ground handlers and representatives of 12 Ministries. It was made clear at this meeting that all participants within the tourism industry felt strong efforts should be made to increase tourism visitation; upgrade the product to attract more higher spending tourists and ultimately attract more individual travellers through the expansion of scheduled air traffic to the country.

It was agreed this could best be achieved by implementing the recommendations of two reports; the Tourism Development Master Plan of 2006 and the GTA Review of 2008. Whilst some work had been done on implementing the 55 or so recommendations in these reports, all of which were considered to be still relevant, there was much left to do and a more focused approach would be needed if this was to succeed.

It was at this point that ILM was asked by the Minister of Tourism and Culture to submit proposals for a consultative assignment that would identify how these recommendations might best be implemented, who would take responsibility, timelines for implementation, related costs, and measures of success. Effectively a private sector approach would be adopted, requiring a fully costed business plan to be prepared that would provide:

- A route map for implementation, to guide and direct those responsible for its implementation.
  - A fully costed document that may be used to attract funding to support implementation of all the action points identified from the recommendations.
  - A clear description of the necessary structures, strategies and organisation required to implement and develop the expansion of tourism in the country.
- Although tourism is an activity sustained mainly by the private sector, governments have traditionally played a key role in its development and in the promotion of their countries as tourism destinations. Examples used in the reasoning of government involvement in tourism include:
    - Contribution to balance of payments,
    - Regional development and regeneration,
    - Diversification of the national economy,
    - Co-ordination of a fragmented industry,
    - Employment opportunity,
    - Increased export and foreign earnings.
  - It is generally recognised that for tourism to develop in a sustainable manner, an appropriate physical, regulatory, fiscal and social framework is required and this can only be provided by governments. Government's role in tourism is very much as a facilitator, particularly given the cross-sectoral nature of the industry.
  - The previous eight years of operation by the Gambia Tourism Authority have shown quite clearly that the greater the scope of activity, the less attention (and funds) is applied to the key function of international promotion and marketing. Previous Chairmen of the Authority confirm to us that, when the GTA was incorporated, it had a much clearer focus on marketing and conducted this activity more successfully in the early days.

Over time greater responsibility has been passed to the Authority for product development, capacity building and industry regulation, to a position where there is now little marketing activity and less than 50% of the budget is applied to marketing activity.

- In applying this experience to the approach adopted by many other countries, we have no doubt in recommending that two separate bodies are incorporated to take tourism forward, one to focus only on marketing and promotion and the other to take greater responsibility for other areas of growth and development in the industry. Good practice in change management also suggests to us that, whilst one of these bodies may be similar to the existing GTA, there should be a step change in its organisation, including a new identity and new staffing structure.
- We would recommend the incorporation of the following two bodies:

#### **The National Tourism Commission (NTC)**

This Parastatal, reporting to a Board of Directors would take responsibility for the following areas:

- Co ordination of all stakeholder activity, both public and private sector.
- Strategy development and growth.
- Advice to Government on tourism direction, performance and growth.
- Product development.

#### **The National Tourist Board (NTB)**

This Parastatal, reporting to a separate Board of Directors would take responsibility for the following areas:

- International promotion and marketing.
- Overseas marketing offices and country representation
- The rationale for the design of the two new organisations from the current GTA structure (and the additional resource to facilitate foreign funding at the Ministry) is driven by a number of factors, namely:
  - A clarity of purpose for the new organisations and the key roles within them.
  - To determine and then communicate and set objectives around a tourism plan that is 'owned' by all stakeholders. In effect to ensure that the recommendations in this and previous reports are understood and executed.
  - To ensure all managerial and senior personnel are aware of their own role, responsibilities and measurable objectives to deliver the agreed plan.
  - To move to a culture of performance management where individuals are held accountable for delivering results over realistic time periods.
  - To recruit professionals who have demonstrated expertise and have experience in the requisite areas e.g. tourism marketing, international leisure development etc.
- It is proposed that the Director General of the NTC will be a tourism professional with strong product development skills, almost inevitably resourced through international placement. It is anticipated that the CEO of the NTB will be a strong business/political Gambian National. He will be advised by a marketing advisor with strong international experience, funded by donor agency support. The head count of the two entities is planned to be less than the current number of staff employed by the GTA. Both entities and the MOTC will be further advised and supported by a non executive director role filled by an expatriate with strong experience in the tourism and development sector. This position will also be funded by donor agency support.

- The above structures are strongly recommended to deliver real and sustainable change and to allow the respective organisations and the individuals employed to focus on the key priority tasks. Success however will require the following critical elements to be in place:
  - A clear, well communicated transition plan that has clear milestones, timelines and accountabilities.
  - Adequate resource to secure the quality of personnel for the key roles; specifically the Director General of the NTC and the Marketing Advisor of the NTB.
  - Collective ownership by all stakeholders of the strategic priorities for the NTB and the NTC.
  - A clearly communicated action plan with measurable objectives for all senior personnel with regular reviews i.e. performance management with rewards commensurate with achievement.
  - A means by which the activities of all parties may be monitored and supported by international industry advice being made available through a non executive directorship.
- The aims, objectives, vision and mission of the two new entities are outlined within this document and supported by detailed task and process analysis that will guide the staff and management in the implementation of the Business Plan.
- The five year Business Plan for the NTC will largely evolve around the implementation of the action point recommendations drawn from the TDMP and the GTA Review. These action points are presented in a detailed manner designed to assist implementation. Each action point also comprises a KPI allocated to one of the key staff outlined in the NTC/NTB organisation structure.
- The primary action points for implementation have been detailed within the structure of the Business Plan. Secondary action points have been presented in summary form, these do not form part of the remit of this assignment but they have been shown to ensure the Business Plan is comprehensive and complete. These action points have not received detailed investigation and may require further review before action is implemented.
- The implementation plan identifies 16 primary and secondary projects requiring significant levels of funding (in excess of US\$30,000). These represent a total funding requirement of US\$1.75million, over a period of three years, this excludes the annual cost of the tourism marketing plan at US\$3.0million per year. In addition, those action points relating to the TDA's have been consolidated, combining them under one project programme which has been costed at some US\$640,000. This level of funding will provide a detailed analysis of each area and take development projects forward to a master plan or concept design stage. The full cost of the implementation of these action points cannot be estimated at this time as much of the work will involve the design and building of new facilities.
- The operating costs of the NTC are covered by revenues earned through the classification, licensing and development levies charged to stakeholders. The NTB will be funded through the tourist levy charged to all air passenger arrivals, the Government subvention and donor agency support.
- It is anticipated that once the tour operator market sees that the business plan is being implemented and positive change is being promoted within the industry, it will be possible to raise the tourist levy, over a two year period, from US\$7.50 to \$20, in line with many competitive destinations.
- The above five year plan indicates a significant level of increased expenditure on both tourism product development and international marketing. The following table shows how these investments compare to the current average annual investment in tourism of some US\$2.0million. All figures are in 2010 values.

**Tourism Development Funding and Related Costs 2010 - 2014**

	<b>2010</b>	<b>2011</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>
<b>Income</b>					
Government Subvention	43,228	43,228	43,228	43,228	43,228
Tourist Levy	1,108,154	1,412,684	2,558,903	3,419,624	3,590,605
Other Revenues	830,615	830,615	830,615	830,615	830,615
Donor Agency Support	60,000	2,165,500	352,500	500,000	500,000
<b>Total Income</b>	<b>2,041,997</b>	<b>4,452,027</b>	<b>3,785,246</b>	<b>4,793,467</b>	<b>4,964,448</b>
<b>Less</b>					
Operating Costs*	892,943	892,943	892,943	892,943	892,943
Donor funding costs	60,000	2,165,500	352,500	500,000	500,000
<b>Total operating costs</b>	<b>952,943</b>	<b>3,058,443</b>	<b>1,245,443</b>	<b>1,392,943</b>	<b>1,392,943</b>
<b>Net Income for Marketing Spend</b>	<b>1,089,054</b>	<b>1,393,584</b>	<b>2,539,803</b>	<b>3,400,524</b>	<b>3,571,505</b>

\*These costs assume donor agency support for the DG of the NCT, the industry advisor and the marketing executive.

- Although modest, the impact of an annual average increase in tourism arrivals, matched with a move toward higher spending tourists, both on package holidays and as independent travellers, the impact on the Gambian economy will be significant. This impact will be felt through increases in employment, contribution to GDP and increased export earnings. In addition the business plan presented will make significant moves into increasing the inclusion of the Gambian community within tourism. Employment impact is the most immediate and measurable benefit to increased tourist activity; for every new bedroom added to supply a further two jobs within the industry are created. On publication and implementation of the Business Plan we would be confident that two known development projects may be encouraged to proceed; Qatari Diar have shown interest in developing a tourist beach resort, and we are aware of a privately funded Wild Life Game resort under consideration. Should these two developments proceed a further 400 jobs could be created over the coming years.
- The ratio of the contribution tourism makes to GDP is less well documented or measured. Published data varies from an estimate of tourism contribution to GDP in 2004 by the WTO at 13% to 16% by the World Bank in 2005. The Business Plan sets out a model for calculating tourism contribution to GDP and this estimates a contribution of 14.7% for 2009. This model has been extrapolated over the five year term of the Business Plan and the potential future contributions to GDP calculated. A summary of this model is shown in the following table.



### Growth in Tourism Revenues and Contribution to GDP 2009 - 2013

	2009	Growth %	2010	Growth %	2011	Growth %	2012	Growth %	2013
Tourist Arrivals	119,017	100.0%	119,017	103.7%	123,476	105.9%	130,801	106.3%	138,981
Total Tourism Revenue	193,681,803		199,492,257		215,318,689		239,580,153		272,478,348
Less Leakage	84,655,004		87,194,654		94,178,739		104,841,481		119,251,870
Net Tourism Contribution	109,026,799		112,297,603		121,139,950		134,738,672		153,226,478
Country GDP	740,544,000	1.05	777,571,200	1.05	816,449,760	1.05	857,272,248	1.05	900,135,860
Tourism Contribution Ratio	14.7%		14.4%		14.8%		15.7%		17.0%

## 1 THE REPORT

### 1.1 Introduction to the Assignment

The Ministry of Tourism and Culture (MoTC) held a stakeholders weekend retreat at the end of March 2010 to discuss the way forward for tourism in The Gambia, what its aims and objectives might be and how to take these forward to a successful conclusion. The stakeholders comprised hotel owners and operators, the Gambia Tourism Authority (GTA) and representatives from other tourism institutions, tour operators and ground handlers and representatives of 12 Ministries.

It was made clear at this meeting that all participants within the tourism industry felt strong efforts should be made to increase tourism visitation; upgrade the product to attract more higher spending tourists and ultimately attract more individual travellers through the expansion of scheduled air traffic to the country.

It was agreed this could best be achieved by implementing the recommendations of two reports; the Tourism Development Master Plan of 2007 and the GTA Review of 2008. Whilst some work had been done on implementing the 55 or so recommendations in these reports, all of which were considered to be still relevant, there was much left to do and a more focused approach would be needed if this was to succeed.

It was at this point that ILM was asked by the Minister of Tourism and Culture to submit proposals for a consultative assignment that would identify how these recommendations might best be implemented, who would take responsibility, timelines for implementation, related costs, and measures of success. Effectively a private sector approach would be adopted, requiring a fully costed business plan to be prepared that would provide:

- A route map for implementation, to guide and direct those responsible for its implementation.
- A fully costed document that may be used to attract funding to support implementation of all the action points identified from the recommendations.
- A clear description of the necessary structures, strategies and organisation required to implement and develop the expansion of tourism in the country.

### 1.2 The Business Plan

In adopting this approach it was essential to seek the co operation of those participants who would be involved in the implementation of the business plan, as this approach would need their total ownership and commitment to ensure the success of the plan. Discussions were held with many of the stakeholders involved with this process and where possible, agreement reached on the structure, format and direction of the plan.

A key change in the structure of Government support to tourism in The Gambia was outlined in these initial discussions and this subsequently led to the recommendation of the creation of two new entities, a national tourism authority (The National Tourism Commission) to direct policy, promote development and measure/improve performance, and a national tourist board (The National Tourist Board) to conduct the marketing and international promotion of tourism to the country in a local, regional and international context. This approach seeks to emulate best practice in other countries seeking to support their tourism industry.

It is our vision that this business plan will provide the tourism industry and all its stakeholders with the necessary steps to implement actions that will lead to the successful development of sustainable tourism. It will also provide the vehicle through which funding (domestic and donor agency) may be attracted to finance this implementation and provide a means to measure performance and thus reward success.

### 1.3 The Financial Analysis and Funding Opportunities

This Business Plan shows the estimated cost of implementing the action points, time lines for implementation and cost benefits to be achieved. Implementation funding will be sourced from three key areas, namely:

- The Tourist Levy which makes up the majority of the GTA revenues
- Further subvention funding from the Government
- Donor Agency support.

The sources of donor agency support may comprise the following organisations:

- World Bank
- Commonwealth Secretariat
- Ministry of Trade under the Enhanced Integrated Framework Project
- GTZ
- European Union
- African Development Bank
- Qatari Diar

## 2 THE GOVERNMENT ROLE IN TOURISM DEVELOPMENT

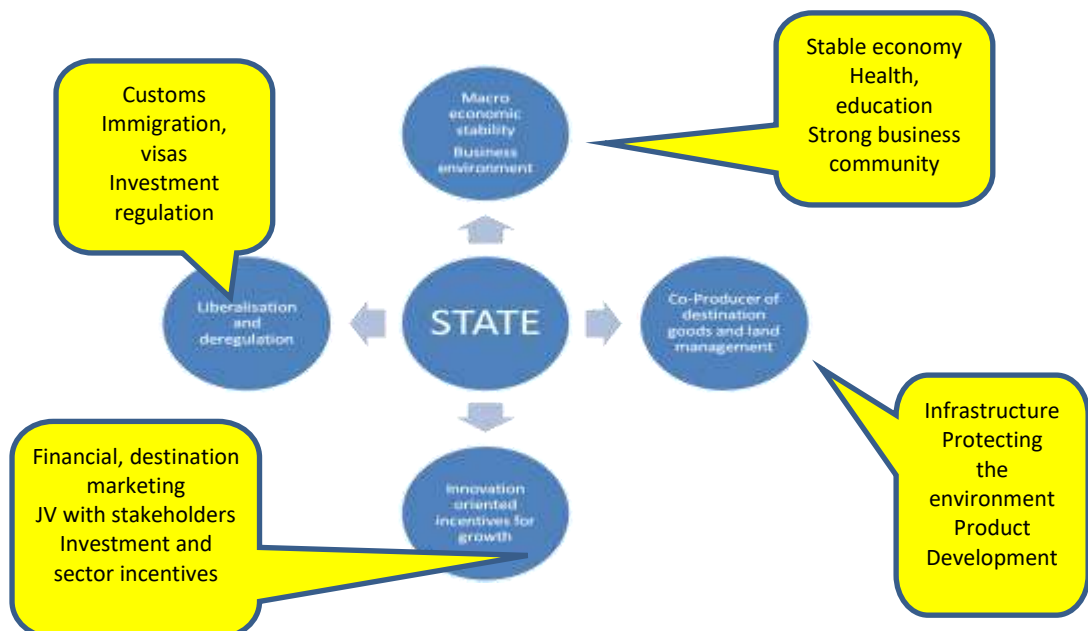
### 2.1 Aims and Objectives

Although tourism is an activity sustained mainly by the private sector, governments have traditionally played a key role in its development and in the promotion of their countries as tourism destinations. Examples used in the reasoning of government involvement in tourism include:

- Contribution to balance of payments,
- Regional development and regeneration,
- Diversification of the national economy,
- Co-ordination of a fragmented industry,
- Employment opportunity,
- Increased export and foreign earnings.

It is generally recognised that for tourism to develop in a sustainable manner, an appropriate physical, regulatory, fiscal and social framework is required and this can only be provided by governments. Government's role in tourism is very much as a facilitator, particularly given the cross-sectoral nature of the industry. The level of detail to which government involvement can reach is shown in Table 2.1 The Government role in Tourism.

Table 2.1 The Government Role in Tourism



### 2.2 How Others Do It

In 2006 the World Tourism Organisation conducted a survey of 50 countries tourism organisations, entitled The Structure and Functioning of National Tourist Organisations. This research concluded that the vast majority of public and public/private tourist organisations sought to separate policy, development and measurement (the national tourism authority or NTA) from marketing and promotion (the national tourism organisation or NTO).

Whilst it is quite possible that both entities are fully owned by the public sector, and may report to the same Ministry, their functions will largely be split in this manner.

Even when the NTO is an independent body it usually comes under the influence of the NTA. This influence is justified because the NTA is responsible for monitoring the effective and efficient use of public funds. The average government contribution to NTO total budgets for 45 responding countries was 85%. The lowest government contributor was Norway at 32% although this is countered by many that received all their funding from government sources.

Of the 12 cases studies presented within this piece of research, five had no contractual relationship between the NTA and NTO, five had a written contract and two operated on an informal contractual basis.

There can be no ideal solution to this blend of NTA/NTO relationship; each country is different in its approach and methodology behind tourism development. The single most common characteristic is, however, the emphasis on a separate department or entity taking responsibility for marketing and promotion and little else.

The following examples illustrate how other sub Sahara countries have approached this issue:

### *South Africa*

The Department of Tourism (DoT) was recently set up as a separate ministerial entity to focus on the growth of the tourism industry by providing support to the public and private sectors and the broader community. Prior to 2009 tourism shared a government position with the Department of the Environmental Affairs and Tourism (DEAT). As part of government it seeks to provide guidance and direction in the development of tourism product, research and information, industry regulation, capacity building and national tourism support. South Africa Tourism (SAT) – the NTO, is the marketing and promotion arm of the DoT which receives in excess of 90% of the budget allocated to the DoT. It is funded by a voluntary 1% levy on accommodation and most tourist transport within the country.

SAT has representative offices in nine of its strategic source markets. Its structure is made up of 12 business units, five are specific marketing units for different geographical regions, central marketing, research and e.business, communications and PR, finance and administration, human resources, office of the CEO, strategic relations and the tourism grading council.

### *Ghana*

The Ministry of Tourism (MOT) was created in 1993 with the mandate to develop, promote and coordinate all tourism activities in Ghana. It exists to create a conducive and favourable environment for sustainable growth and development that would ensure that the sector achieves a greater contribution to GDP. The Ministry acts as the policy making body with two implementing agencies, the Ghana Tourist Board (GTB) and HOTCATT, the hotels and catering training institute. The GTB is responsible for industry regulation, the promotion and marketing of tourism both domestically and internationally, research and product development.

Ghana's national tourism policy is strongly driven by the implementation of Ghana's Growth and Poverty Reduction Strategy 2006-2009 (GPRS11). The primary aim of this strategy is to achieve a per capita income of US\$1,000 by 2015 and the MOT is to contribute to this through the realisation of the sector's full potential in contributing to economic wealth creation, employment generation, poverty reduction, environmental conservation and a national and international cohesion.

The MoT initiated a review of tourism policy in 2004; taking some two years to evolve this was reported on in 2007, with an emphasis on absorbing the GTB within the MOT. This has not been acted upon and there is still a duplication of activity and responsibility between the two entities.

There were just under 600,000 international arrivals at the Kotoka airport in 2008. Recent visitor surveys indicate that approximately one third of arrivals are holiday tourism arrivals, suggesting that the country receives around 200,000 holiday visitors a year. It is thought that tourism generates in the region of 55 of GDP.

### *Senegal*

The Minister of Tourism for Senegal has a seat in Cabinet and a great deal of attention is paid to the industry, which is estimated to provide some 25% of GDP. The Higher Council of Tourism comprises eight Board members from the private sector and 11 from Government Ministerial Departments. Supporting the Ministry is a separate Tourism Promotion Agency and an hotel school.

There are five main directorates providing technical assistance and policy advice, namely:

- Directorate of studies and tourism planning
- Department of regulation and supervision
- Directorate of human resources and training
- Directorate of administration and equipment
- Crafts directorate

There are seven regional directorates responsible for the promotion and management of tourism in their region. They have one overseas office, in Atlanta USA.

In 1975 the Society of the Development and Promotion of Tourist Areas and Coasts of Senegal (SAPCO) was created as a joint public/private partnership to develop and promote tourism throughout the country. Additional powers were granted to this partnership in 2004 and it now takes responsibility for land management, project and product development, including public infrastructure, investment in and management of major resorts, creating a development corporation for tourism.

A National Charter of Tourism was incorporated in 2003 as a policy document, in accordance with the UNWTO principles, recognising the importance of tourism to the economy and as a means of raising standards throughout the industry.

International visitor arrivals number around 700,000 per annum, and prior to the recession this was thought to grow to around 1.2million by 2010. The last two years have seen bookings fall and visitor numbers decline. Over 90% of tourists arrive by air, and the majority of these on business tourism. Air access, poorly maintained infrastructure and high taxes have led to a declining contribution from tourism over recent years. A new airport close to Dakar is hoped will help reverse this trend, providing a hub for traffic to and from Europe and north and south America. The project is planned as a build operate and transfer scheme(BOT), and under the current economic recession delays are being experienced.

## **2.3 The Appropriate Model for The Gambia**

The previous eight years of operation by the GTA have shown quite clearly that the greater the scope of activity, the less attention (and funds) is applied to the key function of international promotion and marketing. Previous Chairmen of the Authority confirm to us that, when the GTA was incorporated, it had a much clearer focus on marketing and conducted this activity more successfully in the early days.

Over time greater responsibility has been passed to the Authority for product development, capacity building and industry regulation, to a position where there is now little marketing activity and less than 50% of the budget is applied to marketing activity.

In applying this experience to the approach adopted by many other countries, we have no doubt in recommending that two separate bodies are incorporated to take tourism forward, one to focus only on marketing and promotion and the other to take greater responsibility for other areas of growth and development in the industry.

Good practice in change management also suggests to us that, whilst one of these bodies may be similar to the existing GTA, there should be a step change in its organisation, including a new identity and new staffing structure.

We would recommend the incorporation of the following two bodies:

#### **The National Tourism Commission (NTC)**

This Parastatal, reporting to a Board of Directors would take responsibility for the following areas:

- Co ordination of all stakeholder activity, both public and private sector.
- Strategy development and growth.
- Advice to Government on tourism direction, performance and growth.
- Product development.

#### **The National Tourist Board (NTB)**

This Parastatal, reporting to a separate Board of Directors would take responsibility for the following areas:

- International promotion and marketing
- Overseas marketing offices and country representation

The organisation design, structure and functionality of these two bodies are described in the following Sections.

### 3 ORGANISATIONAL DESIGN, STRUCTURE AND FUNCTIONALITY

#### 3.1 Overview

The Ministry of Tourism exists to promote Gambia as an attractive location for visitors and inward investment; it must be at the heart of the tourism strategy and lead supporting organisations to deliver measurable results. These fundamental principles have been somewhat lost over recent years as the GTA has grown but lacks focus and a clear purpose with no strategic leadership. Above all else there has been little or no measurement against clear objectives making it impossible to distinguish between high and low performers. Much activity has taken place but little progress made.

The following organisational design and revised structures are therefore recommended to redress these critical issues.

#### 3.2 Organisational Design

The rationale for the design of the two new organisations from the current GTA structure (and the additional resource to facilitate foreign funding at the Ministry) is driven by a number of factors, namely:

- A clarity of purpose for the new organisations and the key roles within them.
- To determine and then communicate and set objectives around a tourism plan that is 'owned' by all stakeholders. In effect to ensure that the recommendations in this and previous reports are understood and executed.
- To ensure all managerial and senior personnel are aware of their own role, responsibilities and measurable objectives to deliver the agreed plan.
- To move to a culture of performance management where individuals are held accountable for delivering results over realistic time periods.
- To recruit professionals who have demonstrated expertise and have experience in the requisite areas e.g. tourism marketing, international leisure development etc.

The three organisational designs are described in further detail below with summary job descriptions for the main posts outlined. A critical requirement is for senior personnel to meet regularly to define key objectives and update on current issues – an activity that happens far too irregularly in the current GTA.

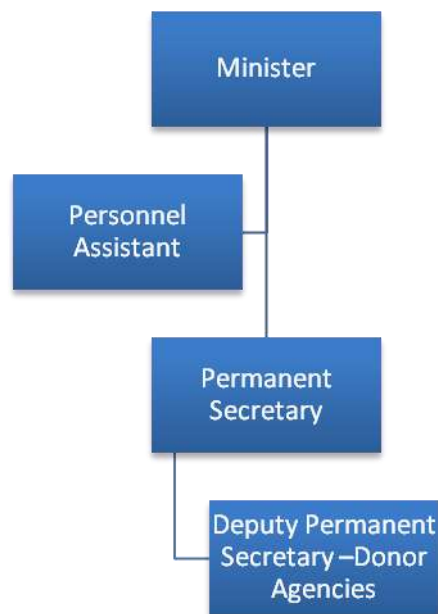
It is also important that on appointment of the senior posts there is input from the leadership to fully define the detail of the job roles and responsibilities at middle and junior management levels to ensure ownership. Once in post each employee must agree their short and medium term objectives with their line manager and a pro-active appraisal process put into place. We recommend a minimum of monthly one to one meetings to assess progress against the key milestones for all levels from manager grade upward.

#### 3.3 Ministry of Tourism

Minimal change is proposed but there is fundamental shift of resource to create a Deputy Permanent Secretary that supports the Minister in building long term relationships with donor agencies. There is evidence of significant work and progress to date but the need for continual follow up and to understand the application process for each donor agency requires additional expertise.



## MINISTRY OF TOURISM



### 3.3.1 JOB DESCRIPTION (SUMMARY)

#### Deputy Permanent Secretary (Donor Agencies) reports to: Minister of Tourism

##### Objectives of the Post

To maximize appropriate external funding for investment in tourism and related areas and to build strong long-term relationships with donor agencies. The DPS to advise and support the Minister in raising the profile of Gambia as a worthy recipient of donor funding

##### Core Functions

- To originate and co-ordinate all the administrative requirements required by donor agencies in the application for funding
- To be the central point of contact for all prospective donor agencies
- To liaise with the NTC and NTB to co-ordinate activities related to the funding of projects
- To ensure the Ministry is kept fully up to date with funding applications and all submissions are timely and accurate

##### Performance Criteria

- To achieve pre-determined and realistic funding targets within agreed timescales
- To research and extend the possible sources of donor funding to maximize opportunities

### 3.4 National Tourist Board (NTB)

The principal emphasis of the National Tourist Board (NTB) is marketing and as its prime function the organisation should be relatively small, but efficient, and staffed by qualified personnel. The key objective is to maximise the available funding for the marketing of tourism to and within The Gambia.

The senior structure encompasses a Chief Executive and a Marketing Advisor who would be

responsible for all marketing and promotional activities. The Marketing Advisor should have extensive international marketing experience and understand the key relationships and drivers in the industry.



### 3.4.1 JOB DESCRIPTIONS (SUMMARY)

**Chief Executive reports to: Board of Directors**

#### **Objectives of the Post**

To lead the NTB and establish its position and credibility with the Ministry and the NTC and to build strong long-term relationships with influencers and decision makers across the public and private sectors. To advise and support the Minister in raising the profile of Gambia as a tourist destination.

#### **Core Functions**

- To enhance and develop the reputation of the NTB as its figurehead and role model
- To manage the political relationships to allow the Marketing Advisor to deliver their key objectives.
- To liaise with the Ministry and the NTC at a senior level to ensure a coordinated and holistic approach to tourism activities for The Gambia.
- To ensure the Ministry is kept fully up to date with the key marketing activities.

**Performance Criteria**

- To ensure the NTB meets its strategic goals.
- To ensure the NTB operates to benchmark international standards and its resources are spent in the most appropriate and effective way. A finance manager will report directly to the CEO, providing timely budget and cost control.

**Marketing Advisor: A parallel report to Chief Executive NTB**

The Marketing Advisor should be in a position to instruct and advise on work in the department and the roles of all managers employed.

The recommended suggested departments' are:

1. Research and Market Information
2. IT and E.Marketing
3. Activities and Promotions

**Objectives of the Post**

To achieve the effective marketing of The Gambia's tourism products and services in order to maximise tourism's social and economic contribution, having regard to Government and Board policy. To re-establish The Gambia as a desirable tourist destination and build on existing markets and develop new or lapsed markets. Grow independent traveller numbers and improve in bound air access through additional charter and scheduled services.

**Core Functions**

- To enhance and develop The Gambia as a tourist destination through effective marketing and promotional activities.
- Co-ordination of the management of the Tourism Authority's human, financial and other resources to achieve pre-determined targets within agreed policies and budgets.
- To advise and instruct the three functional divisions of the organisation.
- To provide general direction of all operations and affairs of the NTB.
- To advise the CEO and Directors of the Board of the NTC on all relevant activities and issues.

**Performance Criteria**

- To achieve pre-determined and realistic tourism visitors within agreed timescales.
- To ensure the NTB operates to benchmark international standards and its resources are spent in the most appropriate and effective way.

**Manager, Research & Data reports to: CEO****Objectives of the Post**

To originate, research and analyse relevant data to ensure the NTB can be pro-active and effective in decision-making to grow awareness and visitors to The Gambia

**Core Functions**

- To enhance and develop the reputation of the NTB through the provision of professional and informed data.
- To ensure that essential market and other research is carried out to the required standards, reviewed and presented to facilitate effective decision making.

- To manage the resource within the department and the agreed budgets efficiently.
- To support the effective marketing of The Gambia as a tourism destination by the provision of the essential statistical, research and strategic planning input.

**Performance Criteria**

- To deliver to time and quality standards the required research and reports as agreed with the Marketing Advisor.
- To ensure the Marketing Advisor and other departments are kept aware of the critical trends and up dated as appropriate.
- To ensure the NTB operates to benchmark international standards and its resources are spent in the most appropriate and effective way.

**Manager, IT/E Marketing reports to: CEO****Objectives of the Post**

To originate, design and deliver appropriate IT support and e marketing activities to drive awareness of The Gambia as a tourist destination

**Core Functions**

- To enhance and develop an inter-active and customer focused website.
- To ensure that investment in IT activities presents value for money and delivers measurable results.
- To manage the resource within the department and the agreed budgets efficiently.
- To support the effective marketing of The Gambia as a tourism destination by the provision of the essential IT support and e.marketing activities.

**Performance Criteria**

- To deliver to time and quality standards the required website and other IT support as agreed with the Marketing Advisor
- To ensure the Marketing Advisor and other departments are kept aware of the critical trends in IT and are up dated as appropriate.
- To ensure the NTB operates to benchmark international standards and its resources are spent in the most appropriate and effective way.

**Manager, Activities & Promotions reports to: CEO****Objectives of the Post**

To originate, design and deliver appropriate marketing activities and promotions to drive awareness of The Gambia as a tourist destination.

**Core Functions**

- To enhance and develop a range of activities including promotions, seasonal events, public relations and sponsorship. Delivering this to a firm marketing strategy.
- To originate campaigns that promote The Gambia across all sectors and enhances social and economic benefits to the community.
- To recommend appropriate activities through discussions with key stakeholders.

- To manage the resource within the department and the agreed budgets efficiently e.g. sub contractors, out sourced activities.
- To support the effective marketing of The Gambia as a tourism destination by the provision of memorable and effective interventions with measurable outcomes.
- To liaise closely with the industry, both locally and overseas.
- To work closely with colleagues (e.g. IT) to ensure promotions / activities can be delivered and assessed for their effectiveness.

#### Performance Criteria

- To deliver to time and quality standards the required promotional and other activities as agreed with the Marketing Advisor.
- To ensure the Marketing Advisor and other departments are kept aware of the activities 'calendar' and are up dated as appropriate.
- To ensure the NTB operates to benchmark international standards and its resources are spent in the most appropriate and effective way.

### 3.5 National Tourism Commission (NTC)

The NTC is the key operational arm of the tourism organizational structure and is primarily responsible for the co ordination of all stakeholder activity, both public and private sector. It also develops strategy to deliver growth of both social and economic benefits to The Gambia and advises Government on tourism direction and performance. It must also develop the appropriate products for the development of tourism.

#### NATIONAL TOURISM COMMISSION (NTC)



### 3.5.1 JOB DESCRIPTIONS (SUMMARY)

#### Director General reports to: Board of Directors

##### Objectives of the Post

To lead the NTC and establish its position and credibility within the industry, the Ministry and the NTB and to build strong long-term relationships with influencers and decision makers across the public and private sectors. To engage all stakeholders proactively and understand the varying needs and agendas to ensure tourism grows responsibly and professionally.

##### Core Functions

- To enhance and develop the reputation of the NTC as its figurehead and role model.
- To manage three direct reports covering quality, finance and development.
- To liaise with the Ministry and the NTB at a senior level to ensure a coordinated and holistic approach to tourism activities for The Gambia.
- To ensure the Ministry is kept fully up to date with the key operational activities.

##### Performance Criteria

- To ensure the NTC meets its strategic and operational goals.
- To ensure the NTC operates to benchmark international standards and its resources are spent in the most appropriate and effective way.
- To ensure each directorate delivers its performance objectives within the agreed time and quality requirements.

#### Director Quality & Control reports to: Director General

##### Objectives of the Post

To drive quality improvements across the tourism sectors and ensure all legal and licensing requirements are fully met. To oversee the issuing of appropriate licenses as required by the current legislation.

##### Core Functions

- To enhance and develop the reputation of the NTC by driving quality standards and recording appropriate measurement data.
- To set clear measurable objectives for the Enforcement Manager and the department as a whole.
- To liaise with the Ministry and the NTB at peer level to ensure a coordinated and holistic approach to tourism activities for The Gambia.
- To ensure the Ministry is kept fully up to date with the key quality, classification and licensing activities.
- To manage the resource within the department and the agreed budgets efficiently.

##### Performance Criteria

- To ensure the Classification, Quality & Control department meets its strategic and operational goals.
- To ensure the department operates to benchmark international standards and its resources are spent in the most appropriate and effective way.
- To improve quality standards across tourism products through consistent and regular inspections

**Director Finance & Administration reports to: Director General****Objectives of the Post**

To lead a pro-active finance and administrative team which provide timely and informative information to enable strategic decision-making. Ensures all inputs and outputs are measured accurately and the returns measured against the investments.

**Core Functions**

- To enhance and develop the reputation of the NTC by driving financial disciplines and pro-actively managing resources
- To set clear measurable objectives for the Finance Manager and the department as a whole.
- To liaise with the Ministry and the NTB at peer level to ensure a coordinated and holistic approach to tourism activities for The Gambia
- To ensure the Director General is kept fully up to date with the key financial information.
- To manage the resource within the department and the agreed budgets efficiently.
- To support the financial management of the NTB and collect on their behalf the tourist levy.

**Performance Criteria**

- To ensure the Finance & Administration department meets its strategic and operational goals
- To ensure the department operates to benchmark international standards and its resources are spent in the most appropriate and effective way.
- To improve value for money and the returns on capital employed.
- To ensure the NTC complies with its annual financial budgets and to protect and enhance its assets, general services, property and equipment.

Within the support staff of the Finance and Administration department should be an HR manager with responsibility for this function within both the NTC and NTB. The primary roles will be to provide recruitment services, monitor and maintain the job descriptions and specifications for each position and ensure the agreed appraisal system is used correctly.

**Director Development reports to: Director General****Objectives of the Post**

To support the effective development of the tourism product through the provision of developmental guidelines, support and advice. To oversee and pro-actively manage the Tourism Development Areas (TDA's) and work closely with GEIPA to support and encourage inward investment.

**Core Functions**

- To ensure an overall product development plan is in place and is realistically capable of being delivered.
- To develop the reputation of the NTC by driving development initiatives and pro-actively building relationships with potential investors.
- To set clear measurable objectives for the Development Manager and the department as a whole.

- To liaise with the Ministry and the NTB at peer level to ensure a coordinated and holistic approach to tourism development activities for The Gambia.

#### **Performance Criteria**

- To ensure the Development department meets its strategic and operational goals.
- To ensure the department operates to benchmark international standards and its resources are spent in the most appropriate and effective way.
- To improve and develop relationships across all stakeholders in the development process.
- To ensure the NTC delivers appropriate development projects that enhance and improve the overall tourism experience and support social and economic objectives.

### **3.6 The Boards of Directors**

Both entities will report to a Board of Directors appointed by the MoFTC with approval/consent from the Cabinet Office/President. The Boards will operate within Government policy in the development and marketing of tourism for the social and economic benefit of the people of The Gambia. The NTC Board will provide leadership for the tourism industry, guiding development policy and product development and control through the experience and direction of a highly qualified Director General. The NTB board will focus almost exclusively on the regional and international marketing and promotion of tourism in the Gambia.

These two Boards will be governed by appropriate Acts of Parliament which will have to be drawn up and passed before the two entities can operate. The following paragraphs provide terms of reference that, along with the GTA Act of 2001, will assist the construction of these Acts and help Board Members to understand their roles and responsibilities.

#### **Terms of Reference:**

Members: The Board of Directors

Quorum: According to the Articles of Association / Relevant Act(s)

Meetings: Four times per year and ad hoc as required.

Chairman: The Chairman of the Group as appointed by the Cabinet Office from time to time or in his absence, the Senior Independent Director or the Chairman appointed by the meeting.

Secretary: Ideally professionally qualified.

#### **Main Responsibilities:**

The Boards will be the main strategic decision making forum for the NTC / NTB. Membership of the Board(s) will comprise appropriate individuals with relevant experience to facilitate professional and sound decision-making.

The Boards will consider:

- Strategic issues and risk, and approve expenditure over certain limits in respect of the respective organisations. It will have overall responsibility for management of the organisation and the delivery of agreed objectives.
- The Board will monitor and oversee the organisation's operations, ensuring



competent and prudent management, sound planning, proper procedures for the maintenance of adequate accounting and other records and systems of internal control and for compliance with statutory and regulatory obligations.

- In carrying out the duties of the Board, the Directors will act in accordance with all relevant and applicable legislative and regulatory rules.

**Responsibilities:**

The detailed responsibilities of the Board are to:

1. Determine and review the organisation's strategic and operational direction
2. Determine the Board's key financial objectives including:
  - (a) Prudential and other ratios; and
  - (b) Target rates of return on capital and on assets.
3. Consider emerging issues which may be material to the business and affairs of the NTB / NTC
4. Keep under review and maintain the capital and liquidity positions.
5. Review and approve proposals for the allocation of capital and other resources within the organisations.
6. Approve material joint ventures, strategic partnerships and alliances which are significant in terms of the business of the organisation.
7. Review and approve the organisations annual capital and revenue budgets (and any material changes thereto).
8. Receive monthly Business and Financial Reports from the principal departments and consolidated reports for the organisation and review actual performance in the light of the organisation's strategy, objectives, corporate and business plans and budgets.
9. Consider and approve the organisation's procedures for reviewing and monitoring risk, and receive regular reports thereon.
10. Approve the organisation's Annual Report and Accounts and its other published financial statements and other material and significant statements issued to the Ministry of Tourism and Culture.
11. Approve arrangements for Annual and Extraordinary General Meetings.
12. Receive and consider high level reports on matters material to the organisation, in particular:
  - (a) Relations with Regulatory Authorities;
  - (b) Human Resources matters;
  - (c) Information systems and technology;
  - (d) Insurance cover;
  - (e) Disaster recovery;
  - (f) Litigation and claims;
  - (g) Premises;
  - (h) Investor and public relations;

- (i) Environmental Policy; and
- (j) Socially Responsible Investment Policy.

13. Establish and maintain appropriate accounting policies, implement and monitor the maintenance of adequate accounting and other records and systems of planning and internal control and inspection.

### **3.7 Industry Advisory Link between the two Boards and the Ministry**

Whilst the two Boards report directly to the MoTC, there is a capacity requirement for expert industry advice to all parties; the MoTC, the Board members and the executive of the NTC and NTB.

This advisory role will help link the actions of all parties and monitor their understanding of roles and responsibilities. It will provide on-going advice on industry matters and bring international experience in developing tourism in today's markets. In addition it will provide a direct informal link between the ministry and the operational activity of both entities.

We would anticipate that this role is taken up by an expatriate industry expert, with knowledge of international tourism development and experience of providing industry advice to national Governments and Ministers of State. The role would be defined as non executive director and the incumbent would sit on both Boards. This would not require a full time position, with perhaps direct access through a country visit of one week in six or eight, with remote access at all other reasonable times.

### **3.8 Conclusion**

The above structures are strongly recommended to deliver real and sustainable change and to allow the respective organisations and the individuals employed to focus on the key priority tasks. Success however will require the following critical elements to be in place:

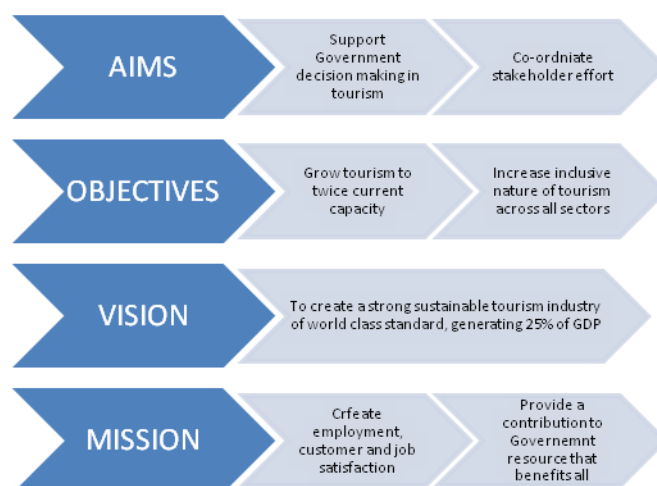
1. A clear, well communicated transition plan that has clear milestones, timelines and accountabilities.
2. Adequate resource to secure the quality of personnel for the key roles; specifically the Director General of the NTC and the Marketing Advisor of the NTB.
3. Collective ownership by all stakeholders of the strategic priorities for the NTB and the NTC.
4. A clearly communicated action plan with measurable objectives for all senior personnel with regular reviews i.e. performance management with rewards commensurate with achievement.
5. A means by which the activities of all parties may be monitored and supported by international industry advice being made available through a non executive directorship.

The following Sections provide greater detail of the structure and function of the NTC and NTB, providing a route map of how these entities may be expected to operate and achieve their aims and objectives through the identification and implementation of key tasks and processes.

## 4 THE NATIONAL TOURIST COMMISSION

### 4.1 Aims, Objectives, Vision and Mission

These have been set out as follows:



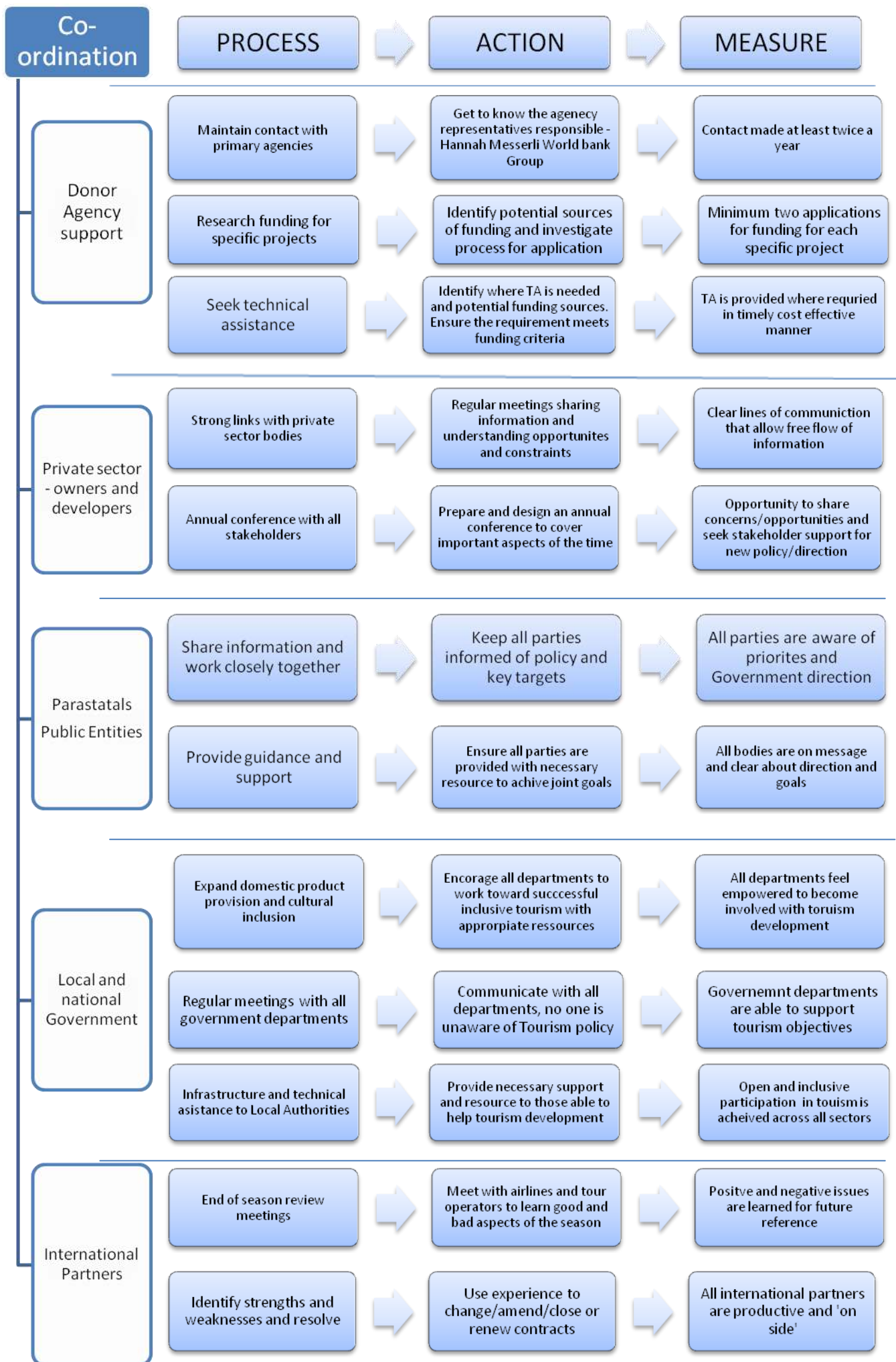
### 4.2 Key focal areas

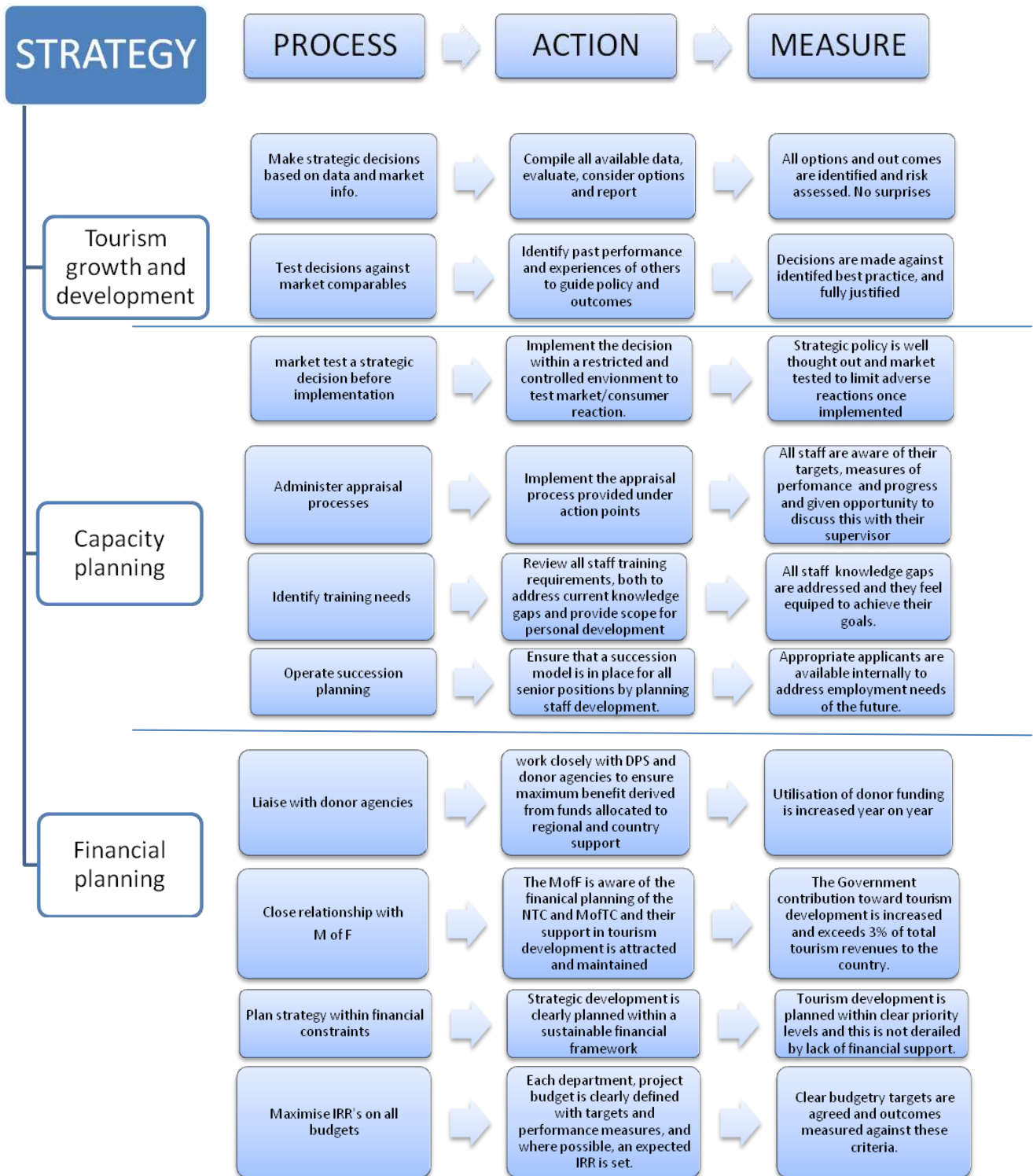
We have identified four key roles for the NTC and applied key tasks to each, as follows:

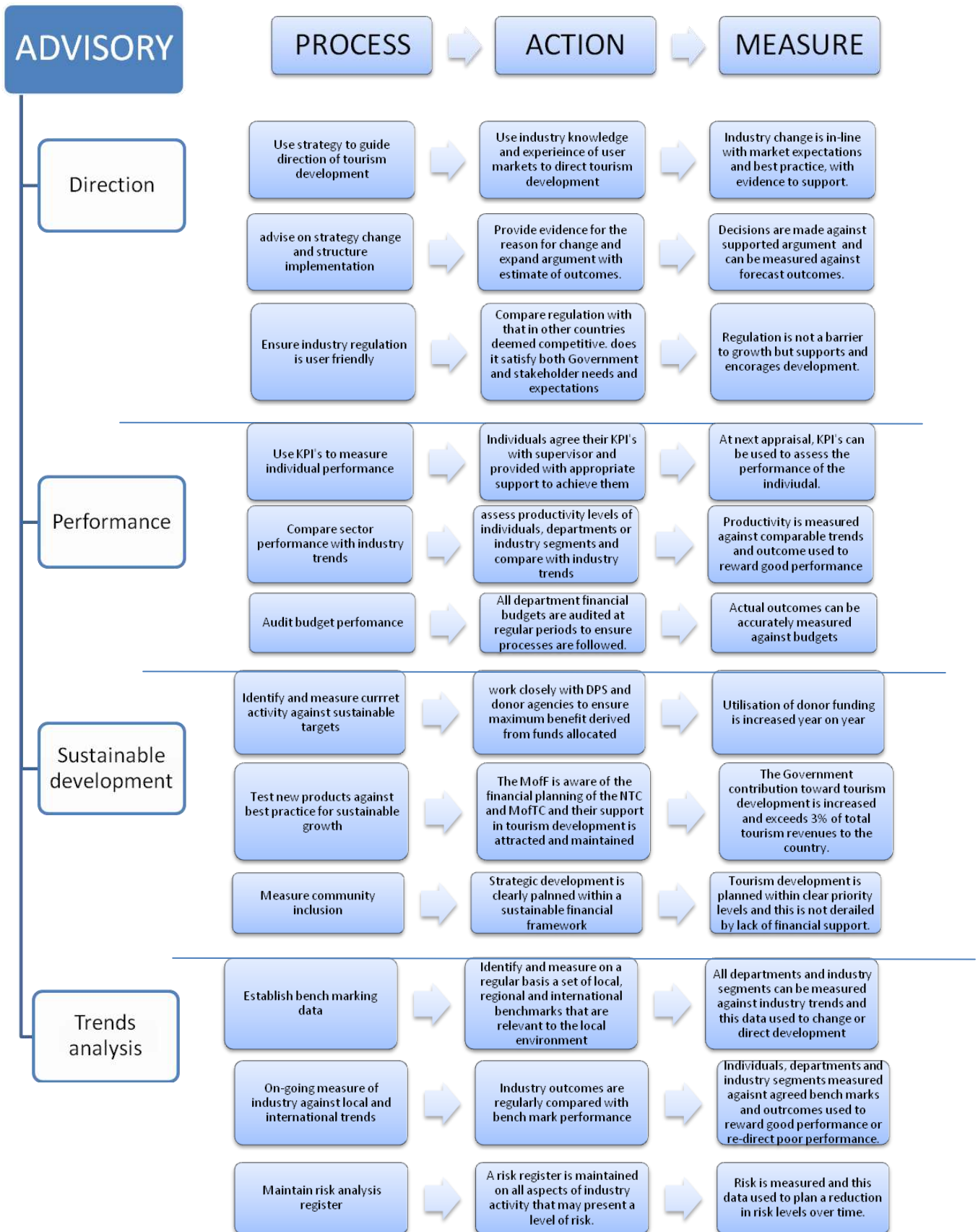


### 4.3 Task and Process

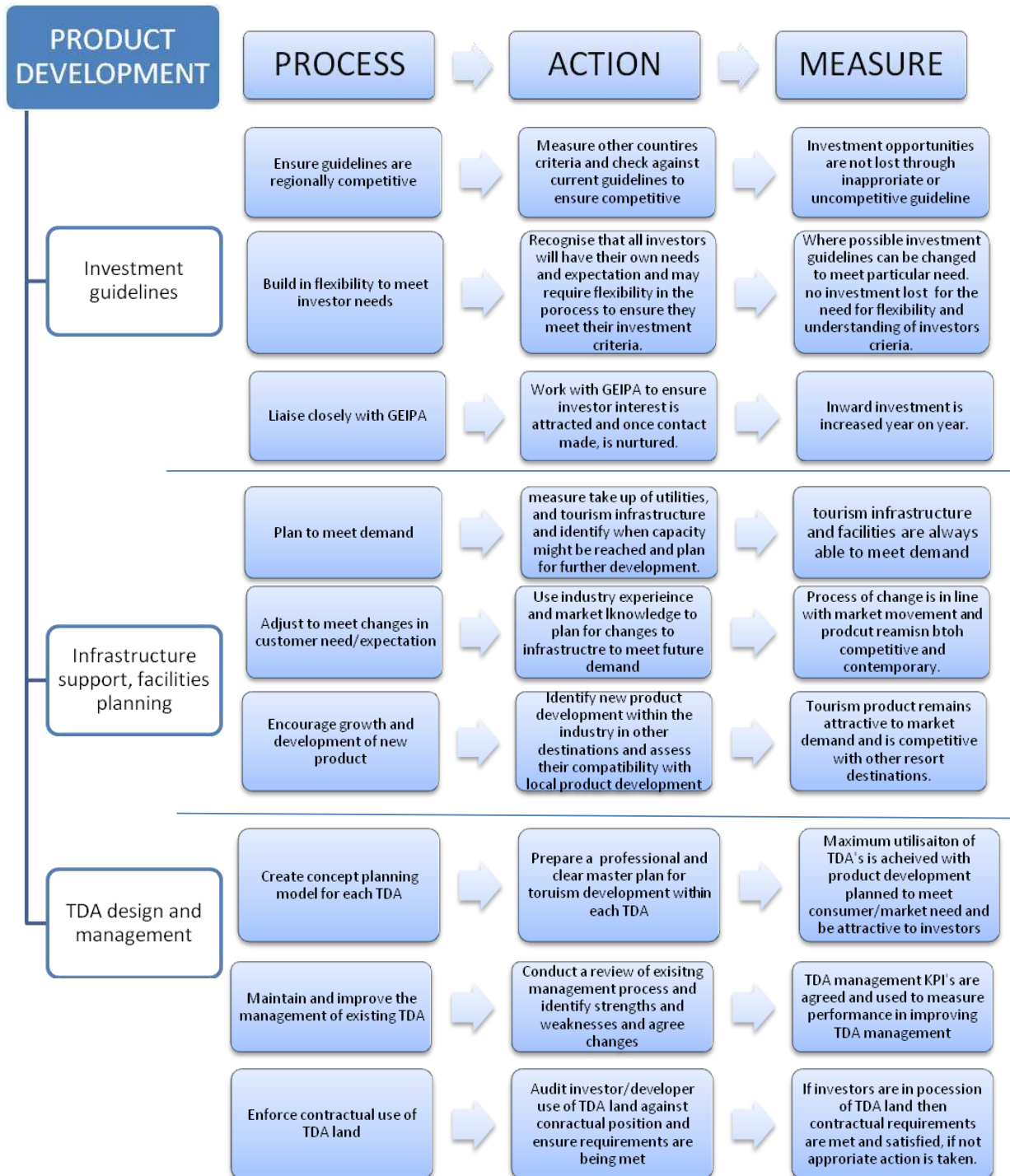
These tasks for each of the four key areas have been further broken down to key processes for each task. These are outlined in the following pages along with related actions and measures for each process. The effective implementation and management of these processes would lead to the successful delivery of the above aims, objectives vision and mission statements.







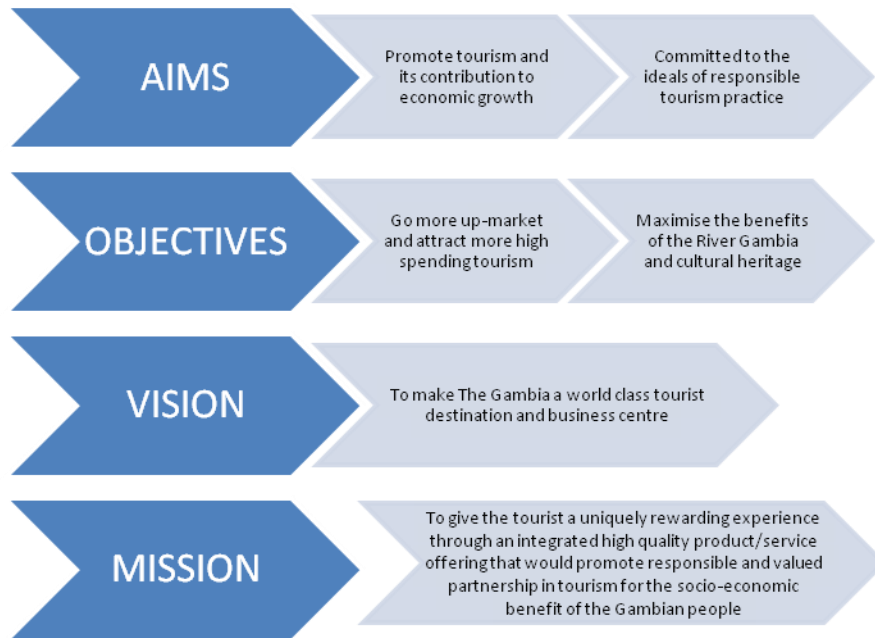




## 5 THE NATIONAL TOURIST BOARD

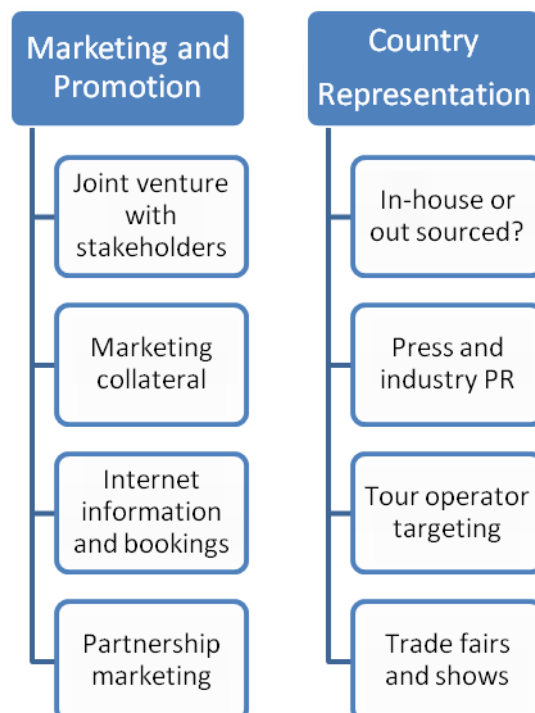
### 5.1 Aims Objectives Vision and Mission

These have been set out as follows:



### 5.2 Key Focal Areas

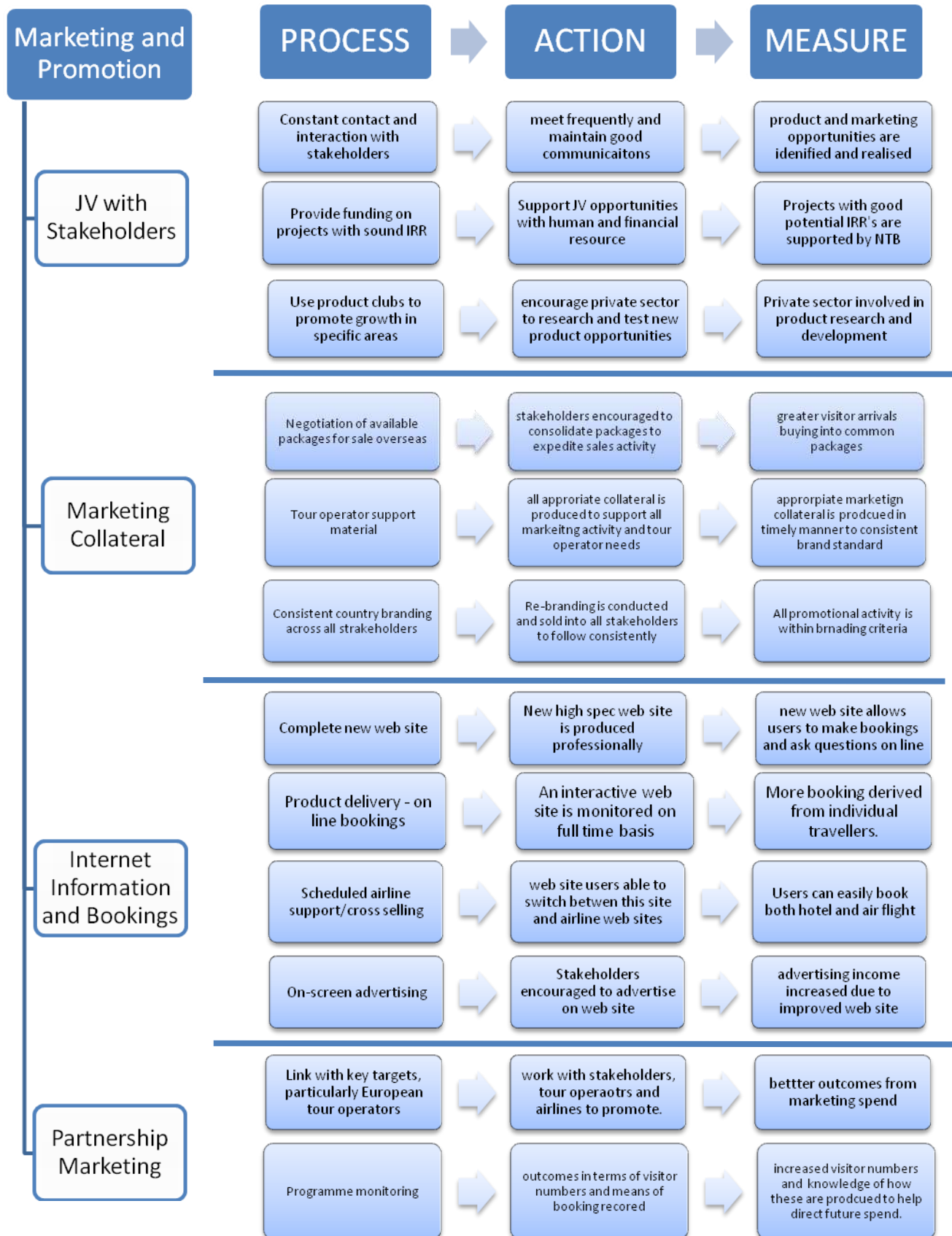
We have identified two key roles for the NTB and applied key tasks to each, as follows:

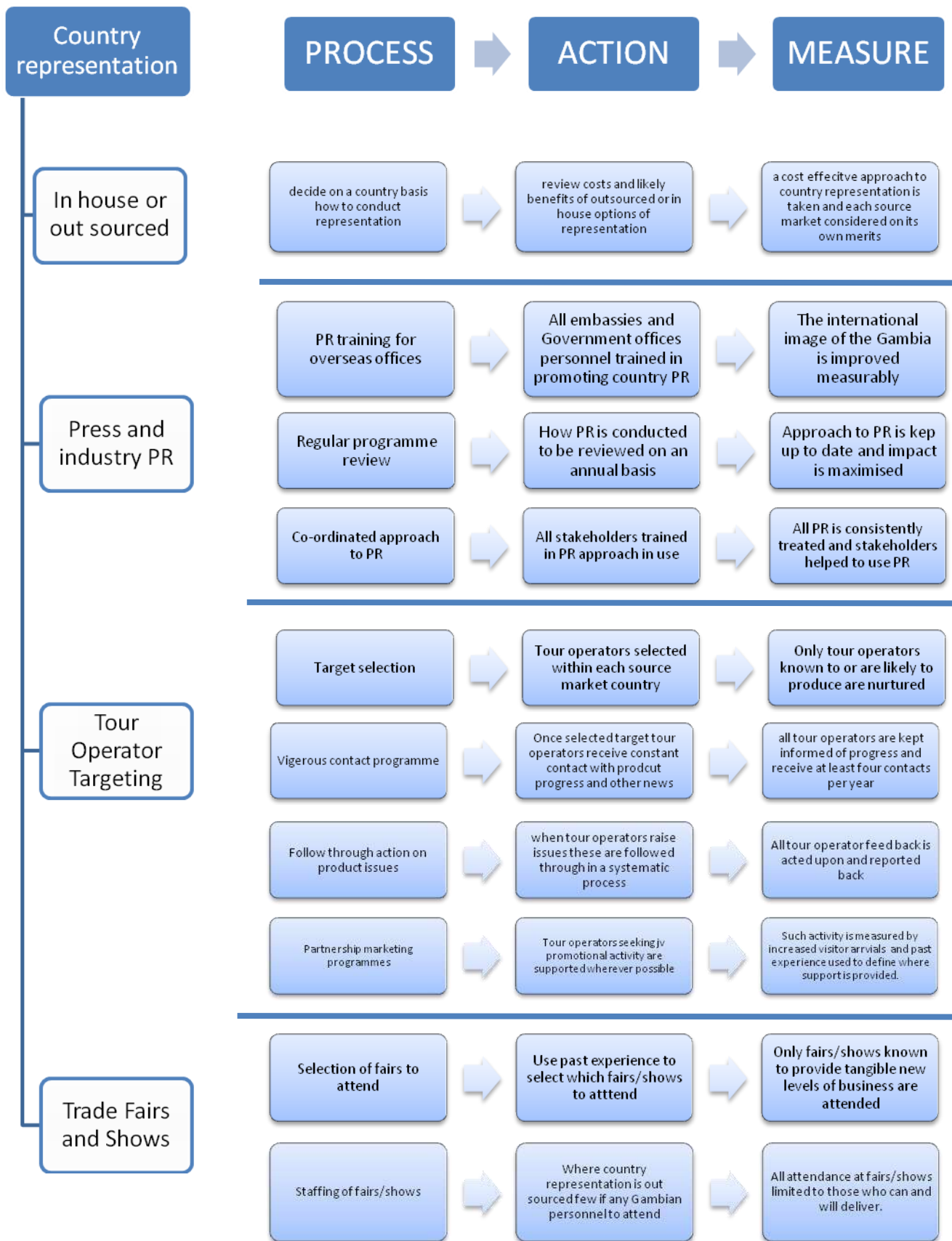




### 5.3 Task and Performance

These tasks for each of the two key areas have been further broken down to key processes for each task. These are outlined in the following pages along with related actions and measures for each process. The effective implementation and management of these processes would lead to the successful delivery of the above aims, objectives vision and mission statements.





## 6 PERFORMANCE AND IMPLEMENTATION

### 6.1 Performance Management

The new organisations – the NTB and the NTC - will only deliver real, sustainable change if their staff understand the key objectives of their role and are pro-actively measured against those objectives.

This necessitates evaluation of performance through the following process:



The strategic and operational goals of the respective organisation are then broken down into specific objectives for each departmental director to disseminate to his or her team. An in depth discussion (c.2 hours minimum) should take place between the line manager and the individual to clarify the key objectives and agree what training and development is necessary to enable delivery of the job requirements. The training needs are planned over the next 3-6 months and signed off together with the agreed performance objectives.

A performance management approach works most effectively if informal feedback, coaching and support is provided regularly between manager and subordinates and then formally reviewed on at least a six monthly cycle.

Appraisal discussions should not be a surprise to either party and not viewed as bureaucracy but as an essential leadership tool to deliver the organisation's goals.

### 6.2 Training skills analysis

There are many ways of assessing training needs within an organisation, a simple tool based on an excel model is shown in Appendix 1. This model seeks to assess both individual training needs and skill gaps within a department. Each element of the assessment is scored for each individual out of ten, with the lowest scores indicating training needs. The HR support team within Finance and Administration should adopt such a scheme and implement throughout the two organisations.

### 6.3 Performance Appraisal Process

The appraisal process enables both line manager and sub-ordinates to evaluate the individuals progress, agree new targets, assess training needs and resources necessary to achieve these goals and agree KPI's, against which further progress can be measured. This process should be applied to all new positions and incumbent staff, and be reviewed on an annual basis.

### 6.4 Primary Action Points and KPI's

The five year Business Plan for the NTC will largely evolve around the implementation of the action point recommendations drawn from the TDMP and the GTA Review. These action points are presented here in a detailed manner designed to assist implementation. Each action point also comprises a KPI allocated to one of the key staff outlined in the NTC/NTB organisation structure in Section 3. This list of action points is presented as KPI's for each staff member in Appendix 2. Further KPI's will need to be drawn from the task and process element of the organisational design and functionality of the two parastatals, as presented in Section 3.

Table 6.1 outlines primary action points which have been detailed within the structure of the Business Plan. All these points have been fully detailed in the preceding Sections, apart from one – the review of the All Inclusive Policy. Whilst this action point will ultimately be implemented by the DG of the NTC, we have provided in Appendix 3 a detailed approach to this growing tourist market segment and how we believe it should be implemented in The Gambia.

Table 6.2 presents in summary form those action points not included within the remit of this assignment but have been shown to ensure the Business Plan is comprehensive and complete. These action points have not received detailed investigation and may require further review before action is implemented.

Table 6.3 has consolidated all those action points relating to the TDA's, combining them under one project programme. As with action points in Table 6.2, these actions do not come within the remit of this assignment and have not been studied in any great detail.

TABLE 6.1 ACTION POINT MATRIX								
ACTION	OBJECTIVE	IMPLEMENTATION APPROACH	BY WHOM		TIMESCALE	RESOURCES REQUIRED		PERFORMANCE MEASURE
			Responsible Person	Supervisor		US\$	Provider	
Establishment of a Tourism Policy and Planning Unit – To be known as the National Tourism Commission	Provide a skilled and knowledgeable resource to both MoTC and the entity responsible for marketing. To monitor maintain and improve industry regulation, licensing and classification, TDA development	Organisation design, objectives, strategy, Unit structure, manpower, job descriptions, processes, resources, responsibilities, operating costs, timelines, setup costs, reporting lines, capacity building, work programme, plan on-going shadow management and measures of performance.	Minister of Tourism		In place and operational by end 2010	Annual operating budget of circa. \$730,000	Capacity and TA support from donor agency. Operating costs from Tourist levy	An efficient, effective and cost effective unit in place to drive tourism in a market driven direction. Increase standards in hotels and restaurants
Design and implement a Marketing programme aimed at attracting new higher level business: TA and financial assistance	Develop a marketing plan for implementation over a five year period	Focus on key marketing indicatives such as direct contacts with tour operators and much reduced activity at trade fairs	CEO Marketing advisor	NTB Board	Implement from January 2011	Annual budget of \$3.0million	Donor agency, tourist levy and MofF contribution	Immediate impact through increased tourist numbers and, over time an increase in high spending tourists. Protection of existing source markets and introduction of new markets

TABLE 6.1 ACTION POINT MATRIX								
ACTION	OBJECTIVE	IMPLEMENTATION APPROACH	BY WHOM		TIMESCALE	RESOURCES REQUIRED		PERFORMANCE MEASURE
			Responsible Person	Supervisor		US\$	Provider	
Rebranding initiative: research in key originating markets, preparation of comprehensive branding programme and branding toolkit for The Gambia	Re-invigorate the tourism brand and ensure the image is consistently applied across all stakeholder involvement.	Define component parts and set out a programme that may be sent out to tender as a separate piece of work. Link with new web site creation currently under action, prepare simple new approach without rebranding the entire programme	Marketing advisor	NTB CEO	4 <sup>th</sup> quarter 2010	750,000	MoF/donor agency	New tourism brand, prepared to international standards, adopted by public and private stakeholders throughout.
Tour operator partnership schemes	To re-establish a substantial presence within the German market to maintain and expand business from existing markets and to begin the development of new markets.	Link with international marketing and promotion campaign, set process controls and parameters. Provide capacity building over a period of time.	Marketing advisor	NTB CEO	2011 onward	Larger share of a \$3.0million marketing budget	Donor agency, tourist levy, MoF.	Minimum of three partnership agreements in place by early 2012
Review of all-inclusive policy	To meet market demand for the all inclusive product, without which any significant re-launch to tour operators is not plausible.	Review experience of Sheraton, assess impact as a resort or as a market segment to the hotel. How best to roll out into other hotels	DG	Minister of Tourism	By end 2010	nil		Document to drive product expansion based on Sheraton experience available to sell into other

								hotels.
TABLE 6.1 ACTION POINT MATRIX								
ACTION	OBJECTIVE	IMPLEMENTATION APPROACH	BY WHOM		TIMESCALE	RESOURCES REQUIRED		PERFORMANCE MEASURE
			Responsible Person	Supervisor		US\$	Provider	
Prepare Five Year Corporate Plan for the NTC	Identify the key objectives from the recommendations of the TDMP and GTA Review, and other priorities and work toward implementation	Incorporate the NTC as recommended, appoint appropriate Board of Directors, appoint a non executive expatriate director as industry advisor, set up departments and begin task and process management	MofTC DG of NTC	NTC Board	Commence five year plan by end 2010			Business Plan is implemented. All TDMP and GTA Review action points are implemented.
Prepare job descriptions with staff	Ensure all staff within the two entities have agreed job descriptions	Agreed Job descriptions for all roles	DG and CEO	NTC and NTB Boards	As managers are employed	nil		All staff have signed and agreed job descriptions
Identify individual staff training needs in relation to the identified needs in the corporate plan	Ensure all new and existing staff are appropriately qualified and trained to meet their KPI's and have a development programme for improvement	Assess current staff against job descriptions and develop capacity programme for each employee, conduct same exercise for all new positions	Line managers	Line managers	As staff are appointed	nil		All staff have agreed KPI's, understand targets and receive appropriate training and support to achieve these.
Institute annual staff appraisal process	Ensure all staff are appraised to match skills, training needs and resources to achieve individual goals and KPI's	Adopt an appraisal procedure and train all line managers in its use and benefits.	HR support Line managers	DG and CEO	Instigate as staff are appointed	\$10,000 on TA training and support	Donor TA on selection and training	All staff are comfortable with the process and able to follow it on a regular basis.

TABLE 6.1 ACTION POINT MATRIX								
ACTION	OBJECTIVE	IMPLEMENTATION APPROACH	BY WHOM		TIMESCALE	RESOURCES REQUIRED		PERFORMANCE MEASURE
			Responsible Person	Supervisor		US\$	Provider	
Instigate donor funded recruitment programme for long-term marketing advisor, DG of the NTC and the industry advisor.	To achieve a significant level of immediate technical expertise via donor funding through appointment of key expatriate specialists..	Prepare documentation for application for funding support, job descriptions and specs, roles and responsibilities. Prepare the requests for proposals and identify a range of appropriately qualified individuals from the expatriate community. Interview and put forward short listed candidates for each post.	ILM team	Minister	September 2010	\$60,000	Donor agency	Funding by November 2010. Short list of applicants by January 2011. Appointments made end January 2011.
Provision of tourism market data so the tourism sector has a measure of performance	Vigorous support to the tourism statistician as currently employed within the GTA	Implementation of land border tourism data to supplement airport statistics, use of UNWTO data resources to bench mark performance against competitors and make this data available to the whole of the tourism sector.	Industry advisor	DG	Immediate			Best use made of available data to measure performance of stakeholders and the industry.
Capacity building in the inspection, licensing and regulation of tourist product as a basis for a quality drive for hotels and restaurants	Establish a team of suitably qualified inspectors to inspect and measure such aspects as standards, health, safety and hygiene, fire regulations and other specific areas that will, in time be incorporated.	Lessons from the recent classification of hotels to be identified and used to formulate a plan to ensure all aspects of objective measurement and analysis can be covered. Seek expatriate TA in training staff and establishing routines and processes.	DG	Board of Directors	Spring 2011	\$50,000	Donor agency for TA and training support	Clearly defined inspection process that leads to rising standards across all tourism product



TABLE 6.1 ACTION POINT MATRIX								
ACTION	OBJECTIVE	IMPLEMENTATION APPROACH	BY WHOM		TIMESCALE	RESOURCES REQUIRED		PERFORMANCE MEASURE
			Responsible Person	Supervisor		US\$	Provider	
Scheduled airline promotion	Identify potential new routes/carriers to expand the scheduled and charter air traffic into Banjul from Europe, maintain and support existing carriers. Identify those carriers at risk of defaulting.	Define target markets, airlines, routes and opportunities, create a work programme that takes NTB and GCAA through all the options on a systematic approach, what can they reasonably expect, how to achieve it, incentives cost to the country.	DG of GCAA CEO	Board of Directors	Commence January 2011	\$45,000	Donor agency support for study in routes planning	No current routes or carriers lost, new routes and carriers introduced within 12 months.
GCAA airline incentive schemes (dependent on outcome of scheduled airline promotion)	Appropriate and effective incentives offered to attract appropriate carriers, new routes that will be able to perform in a sustainable manner	Incentive schemes to be reviewed in light of the scheduled airline promotion. GCAA are in procession of a quote from air industry consultants to conduct this work	DG of GCAA CEO	Board of Directors	Commence March 2011	Not known until outcome of review		All incentive schemes offered are shown to be cost effective and produce new routes/carriers
Institute annual tourism awards	To encourage operators to increase standards of service and physical product provision	Identify award programme, potential sponsors, roles and responsibilities.	DG	Minister	2012	\$5,000	Commercial sponsors	Stakeholders incentivised by annual awards programme.

TABLE 6.1 ACTION POINT MATRIX								
ACTION	OBJECTIVE	IMPLEMENTATION APPROACH	BY WHOM		TIMESCALE	RESOURCES REQUIRED		PERFORMANCE MEASURE
			Responsible Person	Supervisor		US\$	Provider	
Linkage of mainstream travel industry with community development and poverty alleviation	Promote further poverty reduction measures already begun within The Gambia	Work with the tour operator market to nurture cross sector inclusion in tourism activities, including, cultural, food provision, man power, entertainment, local projects that support- add to tourism infrastructure.	Tour operators via the Director of development	DG	On-going	Initial funding for business plan and project definition \$50,000	Donor agency and tour operator market	Greater inclusion of the community within tourism industry and reduced numbers in poverty.
Secure the future of 'Gambia is Good' and develop other similar programmes	To ensure the long term sustainability of GiG as a world class horticulture to tourism linkages project and the replication of this expertise into other poverty reduction efforts.	For GiG to be scaled up to penetrate the local market so that it has sufficient resources to be sustainable in the long term. Achieved through expanding craft market product and establish a wholesale market, expansion of farm management capacity in both numbers and knowledge base.	GiG management	Head of Concern Universal in The Gambia	Mid 2011	\$150,000	Donor agency	Stronger more dynamic GiG activity throughout the country and duplication of its effort in other areas.

TABLE 6.2 ACTION POINT MATRIX								
ACTION	OBJECTIVE	IMPLEMENTATION APPROACH	BY WHOM		TIMESCALE	RESOURCES REQUIRED		PERFORMANCE MEASURE
			Responsible Person	Supervisor		US\$	Provider	
Research with EU tour operators on required product improvements in The Gambia to attract higher spending customers.	Ensure that the product base is appropriate for market need and addresses changes in market expectations	Prepare bench marking tools, processes for updating data on competitive holiday destinations, capacity building by market advisor. Direct contact with tour operators on regular basis.	NTB manager research and data	CEO	On-going	nil		Accurate bench mark data on competition and market needs and expectations. Tour operators have the product they want to sell.
Establishment of minimum standards for hotels and enforcement by licensing control; advise tour operators of properties that are no longer licensed;	To maintain and improve on the hotel classification and licensing system recently introduced	Review hotel classification system, identify strengths and weaknesses, and recommend improvements. Training programmes for inspectors, processes to follow in licensing new product, re-licensing, de-licensing.	Director Quality and control	DG	On-going TA and training.	\$25,000	Donor agency TA and training budget	System improves hotel quality and fewer non-licensed hotels in operation. Inspectors trained to conduct specialist work to high standard.

TABLE 6.2 ACTION POINT MATRIX								
ACTION	OBJECTIVE	IMPLEMENTATION APPROACH	BY WHOM		TIMESCALE	RESOURCES REQUIRED		PERFORMANCE MEASURE
			Responsible Person	Supervisor		US\$	Provider	
Devise and implement bumster programme	Remove bumsters from key tourist areas – beach, airport, visitor attractions and provide work/incentives to lead to productive activity	Only licensed personnel to be permitted in airport perimeter. Tourist Police Information Centres at airport and Cape Point. Employ bumsters in beach cleaning duties. Funding provision to Fajara Barracks for meals on duty, uniforms, fuel, and provision of three vehicles. Purchase a beach cleaning vehicle for Kololi TDA beaches	Director of Control and licences	DG of NTC	All elements in place by November 2010	Start up costs of \$85,000 On-going costs at \$500 per month. Acquisition of a beach cleaning vehicle \$28,000	Donor Agency.	Information points are manned by military staff in casual, non threatening clothing, at key points where tourists can access them for assistance.  Bumsters actively employed and no longer hassle tourists.
Prepare for increase in levy from £5 to \$20 per person in 2012-13, consultation and formal notice to tour operators	Charge a market level tourist tax which enables the Government to provide real and effective support to the industry.	Share the Business Plan aims and objectives with the tourism industry, ensure they are a part of the implementation programme and can see the benefits to be derived.	CEO	Minister	On appointment	nil		Tourist industry accept the increased levy with no adverse reaction.
Training of local tour guides with pilot programme at a location to be decided	Ensure that existing and new guides are fully trained	establish a training programme with local help to train up trainers to train in the future.	HR within NTC	DG	Summer 2011	\$20,000	Donor agency	All trainers are appropriately qualified for their role and this is certified.

TABLE 6.2 ACTION POINT MATRIX								
ACTION	OBJECTIVE	IMPLEMENTATION APPROACH	BY WHOM		TIME SCALE	RESOURCES REQUIRED		PERFORMANCE MEASURE
			Responsible Person	Supervisor		US\$	Provider	
Festival programme for Gambia to enhance tourism – music, entertainment and cultures.	Encourage greater use of cultural activity to support tourism product	Identify potential programme of events, resources to organise, potential sponsors, assess potential to attract events from outside the country, i.e. international festivals.	Development manager	Director of development	On-going	nil		A festival programme with strong international attraction and acclaim is established
Improved customer service and opportunities for young Gambians by upgrading the Gambia hotel school to National Tourism Training Institute Standard, plan and develop to include hotel, cultural guides and bird watching guides.	To raise standards within the hotel school, expand curriculum and increase student capacity.	Review current programme for development and assess further aid requirement, review school objectives, capacity, linkages to other institutions, physical planning, academic training requirements.  Appoint new lecturers for expanded hotel school	Minister of Tourism		By New academic year 2011	\$120,000	Donor TA support	Fully organised and structured expanded hotel school for 250 students by September 2011  Students are provided with skill sets equal to the expectations of stakeholders.

TABLE 6.2 ACTION POINT MATRIX

ACTION	OBJECTIVE	IMPLEMENTATION APPROACH	BY WHOM		TIME SCALE	RESOURCES REQUIRED		PERFORMANCE MEASURE
			Responsible Person	Supervisor		US\$	Provider	
Tourism awareness programme	Improve understanding and awareness of the industry throughout the community.	Create a policy guide of how the tourism institutions should maintain country wide awareness	Development manager	Director of development	On-going	nil		Greater awareness of the importance of the tourism industry throughout the community.
The development investment process. To include progress toward an investment conference in 2011	Develop tourism investment with competitive streamlined process and incentives and conduct an investment conference	Review process with GEIPA and transfer responsibility to NTC, streamline processes, improve capacity, legal review of process, grant support and tax concessions	DG and GEIPA	Board of Directors	November 2011	\$250,000	Donor support for an all sector Investment programme	Inward tourism investment is increased and process made more efficient for all parties. Conference used to sell new projects to investors.

## 6.5 Action Points Relating to the Tourist Development Areas

There are a large number of action points relating to the design, management and function of the TDA's. These have been combined into one project area which could be addressed as one concise and complete assignment.

The action points relating to this project assignment are as follows:

<b>TABLE 6.3 ACTION POINTS RELATING TO TDA'S</b>		
<b>Action Point</b>	<b>Implementation Approach</b>	<b>Estimated Cost US\$</b>
TDA organisation and management	Review current processes, recommend improvements and plan for development of areas. Increase capacity and transfer all responsibility, including land allocation to NTC	20,000
Management to prevent fire and speedy closure of Bakoteh Solid Waste Dump	assess risk and solutions	500
Rehabilitation of Kotu Wastewater Treatment Plant, including extension of the sewage system	review current status	500
Capacity building in reorganisation of TDA land, with site re-allocation for approved development projects and development briefs for key sites.	Establish clear lines of responsibilities, processes, manpower and capacity, objectives, restrictions from planning, how to attract developers and manage the development process.  Prepare concept plans and initial design for three hotel sites	80,000
Create attractive environment in existing TDA – seek to eliminate sand mining, deforestation, stop unapproved development and eliminate existing unapproved development.	Assess need for physical improvements, recommend actions re activities taking place that detract from tourism potential.	2,000
Prepare actions plans for Senegambia Tourism Centre and clean, secure and maintain undeveloped areas of TDA 1	Identify components of Centre, visual impact, design, physical needs of the site, service provision staffing.	20,000
Beach quality 'Blue Flag' beach project employing bumster labour	Assess current programme and need for more, define set up, resources, objectives and man power, training for operators.	20,000

Physical provision at country land and sea borders	Design and build new provision for customs at all land border points.	40,000
Construction of storm water drainage and control of runoff to a standard that safeguards the beach from erosion and the bathing water from contamination	Assess current position relative to targets, manpower, training, inspection process.	5,000
Control of waste burning in and around the TDA, followed by better management of domestic solid waste collection and treatment	Review current provision and recommend new provision, improvements, cost estimates. To include airport, sea port, Barra and Kartong	5,000
Green Hotel Programme	assess current situation, research current best practise and make recommendations	45,000
Encourage development of eco-beach and eco-'bolong' lodges in South Coast and Western River Areas	assess current situation, develop concept plans and initial design and make recommendations	50,000
Prepare action plans for Senegambia Tourism Centre and clean, secure and maintain undeveloped areas of TDA 1	assess current situation, develop concept plans and initial design and make recommendations	50,000
Prepare plans and implement Kololi Beach Park	assess current situation, develop concept plans and initial design and make recommendations	50,000
Prepare plans and implement Kololi Parkway and Bird Watching Centre	Identify components of centre, potential visual impact, design, physical needs of the site.	50,000
Prepare plans and implement Bijilo Forest	Define project, facility mix, objectives, costs and implementation	30,000
Prepare plans and implement Western River Trail	Define project, facility mix, objectives, costs and implementation	50,000
Ninki Nanka trail along the River Gambia, local accommodation, traditional crafts and river transport	Define the project and establish appropriate resources, budget, manpower, physical needs, cost programme and assess cost benefit.	30,000



Development of visitor centres at one or more heritage sites, to include revenue earning activities (retail, food & beverage), working with communities – initially in Jufureh, Banjul Heritage Trail and Fort Bullen	Define appropriate interpretation of each area, design an integrated and common approach to such facilities which can be replicated at reasonable cost.	35,000
Sea front infrastructure - A promenade	Assess practicality of this within the TDA	35,000
Assess river cruising product	Assess demand, practicality of product, define, assess legal and government issues controlling this. Seek investor support and help develop a market driven and cost effective product.	20,000

The above cost estimates are based on the provision of concept plans and initial design of physical buildings where they are to be included. These costs do not take account of the provision of working drawings or construction costs.

The above costs amount to some \$640,000. Each item could be treated separately, or more reasonably they could all be consolidated into one project, or two/three smaller projects. Requests for proposals (RPF's) would have to be compiled for each set of projects and a figure of \$35,000 should be allowed for this preparatory work. The full cost of the implementation of these action points cannot be estimated at this time as much of the work will involve the design and building of new facilities.

## 6.6 TDA Management and Development

The on-going management and development of the TDA's should be under the control of the NTC, including the allocation of land for development which currently resides within the Ministry of Local Government and Physical Planning.

The resource on planning and product development inherited from the GTA will have to be supported with significant levels of technical assistance provided under donor agency funding arrangements. The skill set of the DG of the NTC is focussed on tourism product development and this should include wide experience in working up development projects from concept to operations.

## 7 THE FINANCIAL ANALYSIS

### 7.1 Funding for the new Tourism Structure

Under the Gambia Tourism Authority Act 2001 the Tourism Development Fund was incorporated as the depository for funds allocated to the support of tourism, whether through government subvention, loans, gifts, donations, grants, earned income or tourist taxes or levies. The GTA was charged with the management of this Fund. Under the new parastatal arrangements it is our view that this fund should be managed by the MoTC. We propose that the NTC should operate within its own income derived from licence fees and interest earned on cash assets. The NTB should receive all income from the tourist levy, less a collection fee, and any government loans or subvention and donor agency support funds deemed appropriate by the MoTC.

The capital and income requirements of the NTC and NTB are estimated in the following paragraphs and the consolidated funding requirements are considered later in this Section.

### 7.2 NTC Revenues, Operating Costs and Capital Requirement

The departmental structure outlined for the NTC in Section 3 forms the basis for operating revenues and costs within a full year of operation, presented in 2010 values. Revenues, payroll and operating costs have been based on current levels within the GTA.

A full year revenue and operating cost statement is presented in Table 7.2. This has been structured using the following assumptions and basis for all inputs.

#### **Income**

This comprises charges for applications for operating licenses and development levies and a significant level of bank interest, the figures used have been taken from the GTA budget for 2010. A small fee (2 percent of total levy collected) has been allowed for the collection of the tourist levy on behalf of the NTB. Whilst there may be opportunities to increase revenues from the licence and development levies this has not been considered at this stage.

#### **Operating Costs**

The salary for the DG, an expatriate appointment, has been estimated at a total charge of US\$142,500 per annum. All other payroll has been based on current pay scales within the GTA, on a head count commensurate with the new structure. These costs are detailed in the following table:

Table 7.1 Estimated Payroll and Structure for the NTC

		Annual Salary US\$	Allowances Social Sec US\$	Total US\$	Dept Total US\$
<b>Office of the DG</b>					
DG	1	95,000	47,500	142,500	
PA	1	4,615	2,308	6,923	
Support staff	1	3,846	1,923	5,769	155,192
<b>Quality and Control</b>					
Director	1	9,615	4,808	14,423	
Manager	1	7,692	3,846	11,538	
Inspectors	3	17,308	8,654	25,962	
Support staff	2	3,846	1,923	5,769	57,692
<b>Finance and Administration</b>					
Director	1	11,538	5,769	17,308	
Manager	1	8,654	4,327	12,981	
Accountants	3	17,308	8,654	25,962	
Support staff	2	3,846	1,923	5,769	62,019
<b>Development</b>					
Director	1	9,615	4,808	14,423	
Manager	1	7,692	3,846	11,538	
Officers	2	11,538	5,769	17,308	
Support staff	2	3,846	1,923	5,769	49,038
<b>Security/Other</b>					
Guards	2	4,615	2,308	6,923	
Reception	2	5,769	2,885	8,654	
Tessu	15	10,577	5,288	15,865	31,442
	42				<u>355,385</u>

All other operating costs are based on current costs within the GTA with the exception of fuel and general operating costs which have been calculated pro rata, based on a GTA headcount of 42 and proposed NTC head count of 27, excluding Tessu cleaning staff.

**Table 7.2 NTC Full Year Budget in 2010 Values**

	<u>US\$</u>	<u>US\$</u>
<b>Revenues</b>		
Licences and Levies	720,000	
Interest and other fees	110,615	830,615
<b>Operating Costs</b>		
Payroll	355,385	
Board of Directors	28,000	
Legal/professional	35,000	
Fuel	24,429	
Depreciation	116,400	
Operating costs	168,429	727,642
<b>Surplus</b>		<u>102,973</u>

To achieve this financial independence the net assets of the GTA would have to pass to the NTC and the management of these assets would be under their control. Whilst there are plans for the GTA to build new offices and thus absorb a significant proportion of the net cash available (source of interest earned), it is not essential and better use could be made of this resource. There would be no immediate capital demands made of the NTC, other than the provision of three vehicles to the military in support of the tourist police activity within the TDA's, this figure has been allowed for in the GTA capital budget for 2010.

### 7.3 NTB Revenues, Operating Costs and Capital Requirement

The departmental structure outlined for the NTB in Section 3 forms the basis for operating costs within a full year of operation, presented in 2010 values. The cost of implementing the marketing plan forms by far the largest element of this budget and this has been costed in detail in the sister document to this main report.

Revenue income for this Parastatal comprises the total tourist levy derived from air passenger arrivals, less a collection fee, government subvention or loans, and donor agency support funds.

We are of the view that the finance department of the NTC should take responsibility for collection of the tourist levy, thus retaining the complete focus of the NTB on international marketing and promotion.

An income and operating cost statement is presented in Table 7.4. This has been structured using the following assumptions and basis for all inputs.

**Payroll**

This is based on the head count and pay scales shown in Table 7.3

**Table 7.3 NTB Payroll Schedule**

		<b>Annual Salary</b> US\$	<b>Allowances Social Sec</b> US\$	<b>Total</b> US\$	<b>Dept Total</b> US\$
<b>Office of the CEO</b>					
CEO	1	30,000	15,000	45,000	
PA	1	4,615	2,308	6,923	
Support staff	1	1,923	962	2,885	54,808
<b>Marketing Advisor</b>					
Advisor	1	65,000	32,500	97,500	
PA	1	4,615	2,308	6,923	
Support staff	1	3,077	1,538	4,615	109,038
<b>Research and Data</b>					
Manager	1	9,615	4,808	14,423	
Support staff	1	1,923	962	2,885	17,307
<b>IT/E.Marketing</b>					
Manager	1	9,615	4,808	14,423	
Officers	1	4,808	2,404	7,212	
Support staff	1	1,923	962	2,885	24,519
<b>Activity and Promotions</b>					
Manager	1	9,615	4,808	14,423	
Officers	1	4,808	2,404	7,212	
Support staff	1	1,923	962	2,885	24,519
Guards	2	3,846	1,923	5,769	
Reception	2	3,846	1,923	5,769	11,538
		<u>18</u>			<u>241,730</u>

Other operating costs are estimated from levels of cost incurred within the GTA and reflect a lean organisation working out of premises shared with the Hotel School.

**Table 7.4 NTB Annual Budget in 2010 Values**

	<u>US\$</u>	<u>US\$</u>
Income		
Tourist Levy(less 2%)	1,108,154	
Government Subvention	43,228	
Donor Agency Support Funds		<u>1,151,382</u>
Direct Marketing Costs		3,000,000
Operating Costs		
Payroll	241,730	
Board of Directors	20,000	
Legal/professional	15,000	
Fuel	16,286	
Operating costs	804,286	1,097,301
Shortfall		<u>- 2,945,919</u>

#### **7.4 Consolidated Funding Requirement**

The marketing budget short fall within the NTB may be covered by government subvention, donor agency support or increases to the tourist levy.

In addition to this shortfall is the cost of an industry advisor to support the MoTC and provide a non executive director service to both Parastatals. We would budget this expatriate part time operation at an annual cost of US\$85,000.

Once implementation of the Business Plan begins and it is evident that the two new Parastatals are working hard to improve tourism infrastructure and development, the tour operator industry and airline carriers may accept more readily an increase in the tourist levy. This is currently set at £5.00 per incoming air passenger over the age of 12 years, which is low when compared with competitive tourist destinations such as Morocco charging \$40, Kenya \$20, many Caribbean islands charging up to \$54 and Cuba \$25.

It is our view that the levy should increase to £10 (US\$15.00) in the season 2011/12 and £15(US\$20.00) in 2012/13. At \$20.00 per tourist, the levy will, by 2013 provide sufficient funds to permit a dedicated spend on direct marketing of US\$ 3.0million, assuming an annual compound growth in visitor arrivals of 5%.

## 7.5 Project Funding Requiring Donor Agency Support

The implementation plan detailed in Section 6 identifies 16 projects requiring significant levels of funding( in excess of US\$30,000), these are summarised in Table 7.5 below, representing a total funding requirement of \$4.75million.

**Table 7.5 Major Implementation Projects Requiring Funding**

Action Point	Estimated Cost US\$	Time Lines
Implement Marketing Plan	\$3,000,000 per annum	5 year Programme
Recruitment of DG for NTC, Marketing Advisor and Industry Advisor	\$60,000	Commence 4 <sup>th</sup> Quarter 2010
DG of NTC on Contract	\$142,500 a year for two years	In contract by January 2011
Marketing Advisor on Contract	\$100,000 a year for two years	In contract by January 2011
Industry advisor on contract	\$85,000 a year for two years	In contract by January 2011
Scheduled airline promotion	\$45,000	Commence January 2011
Linkage of travel industry with community development and poverty alleviation	\$50,000	Spring 2011
Secure and expand GiG programme	\$150,000	Summer 2011
Devise and implement bumster programme	Capital cost of \$113,000 Ongoing costs of fuel, meals and uniforms	Begin asap and on-going
Re Branding exercise	\$750,000	Commence 4 <sup>th</sup> quarter 2010
TA and Capacity planning for licensing and inspection of tourism establishments and training of trainers for tour guide programmes.	US\$50,000	Complete by Spring 2011
Build on hotel classification and licensing model	\$25,000	Summer 2011
TA and capacity planning for Hotel upgrading of curriculum and doubling of student capacity	US\$120,000	Complete by September 2011
Tour guide training and training of trainers	\$20,000	Summer 2011

Conduct an inward investment development programme to attract FDI, leading to an investment conference in 2011	\$250,000	Complete by November 2011
Development and management of the TDA's		
Prepare request for proposals	\$35,000	Spring 2011
Develop and implement all action points	\$640,000	Commence 1 <sup>st</sup> quarter 2011

## 7.6 The Tourism Development Five Year Corporate Plan

### Implementation Timelines

The above actions for implementation have been given a level of priority over a period of five years and are shown in Table 7.6. Within this time frame, many of the action points will be reviewed and programmes amended.

### Financial Commitment over the Five Year Period

In Table 7.7 we show the funding implications of the introduction of the two new Parastatals and the implementation of all action points and larger projects that require donor agency support.



**Table 7.6 Action Point Implementation Timelines**

Responsible Unit	Action	2010	2011				2012				2013				2014				2015			
		Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	
MoTC	Appoint NTC DG and NTB CEO, board selection	Programme development																				
NTC/NTB	Set up and recruitment	Implementation	Implementation																			
External	Retain DG, Marketing and Industry Advisors	Programme development	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation													
NTC/NTB	Employ local marketing expert								Programme development													
NTB	Implement Marketing Plan		Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation
NTC	Review and promote All-Inclusive Product	Programme development																				
NTC	Devise and implement Bumster Programme		Programme development	Implementation																		
External	Inward investment development		Programme development	Implementation																		
External	Training for staff appraisal and training need			Programme development	Implementation																	
NTB	Tour operator partnership schemes		Programme development		Implementation																	
External	Rebranding exercise		Programme development	Implementation																		
External	Scheduled airline promotion		Implementation											Implementation								
NTC/GCAA	Airline incentive schemes				Programme development			Implementation													Programme development	
NTC	Instigate annual tourism awards						Programme development	Implementation			Programme development	Implementation		Programme development	Implementation					Programme development	Implementation	
External	Classification development, Training of tour guide trainers and inspectors		Programme development	Implementation										Programme development	Implementation							
External	Hotel school training				Programme development	Implementation							Programme development				Programme development					Programme development
NTC	Social and cultural inclusion			Programme development	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation	Implementation
NTC	Festival programme			Programme development	Implementation			Programme development	Implementation			Programme development	Implementation			Programme development	Implementation			Programme development	Implementation	
NTC	Development of the Investment Process			Programme development	Implementation																	
NTC	Development and management of TDA's		Programme development	Implementation	Implementation	Implementation						Programme development				Programme development						Programme development

Programme development Implementation

**Table 7.7 Funding Commitment Timelines**

Responsible Unit	Action	2010	2011				2012				2013	2014	2015	
		Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q1	Q1	
MoTC	Appoint NTC DG and NTB CEO, board selection	20,000												
NTC/NTB	Set up, recruitment and operation	10,000	260,000	260,000	260,000	260,000	260,000	260,000	260,000	260,000	1,040,000	1,040,000	1,040,000	
External	Recruit Marketing and Industry Advisors	40,000	45,625	45,625	45,625	45,625	45,625	45,625	45,625	45,625				
NTC/NTB	Employ local marketing expert										14,000	14,000	14,000	
NTB	Implement Marketing Plan		750,000	750,000	750,000	750,000	750,000	750,000	750,000	750,000	3,000,000	3,000,000	3,000,000	
NTC	Devise and implement Bumster Programme			113,000										
External	Inward investment development		85,000	85,000	80,000									
External	Training for staff appraisal and training need			5,000	5,000									
External	Rebranding exercise		250,000	250,000	250,000									
External	Scheduled airline promotion		25,000	20,000										
External	Classification work, training trainers and inspectors		30,000	55,000	10,000									
External	Build on Classification and Licensing model			25,000										
External	Hotel school training				40,000	40,000	40,000							
NTC	Social and cultural inclusion		50,000	50,000	50,000	50,000								
NTC	Development Investment Process			125,000	125,000									
NTC	Documentation to Tender for TDA works		35,000											
NTC	Development and management of TDA's*				130,000		130,000				130,000	130,000	130,000	
Internal costs		10,000	1,010,000	1,010,000	1,010,000	1,010,000	1,010,000	1,010,000	1,010,000	1,010,000	4,054,000	4,054,000	4,054,000	
Donor Funded Costs		60,000	520,625	773,625	735,625	135,625	215,625	45,625	45,625	45,625	130,000	130,000	130,000	
Total Spend		70,000	1,530,625	1,783,625	1,745,625	1,145,625	1,225,625	1,055,625	1,055,625	1,055,625	4,184,000	4,184,000	4,184,000	

## 7.7 Financial Outcomes

The above five year plan indicates a significant level of increased expenditure on both tourism product development and international marketing. Table 7.8 shows how these investments compare to the current average annual investment in tourism of some US\$2.0million. All figures are in 2010 values.

**Table 7.8 Tourism Development Funding and Related Costs 2010 - 2014**

	2010	2011	2012	2013	2014
<b>Income</b>					
Government Subvention	43,228	43,228	43,228	43,228	43,228
Tourist Levy	1,108,154	1,412,684	2,558,903	3,419,624	3,590,605
Other Revenues	830,615	830,615	830,615	830,615	830,615
Donor Agency Support	60,000	2,165,500	352,500	500,000	500,000
<b>Total Income</b>	<b>2,041,997</b>	<b>4,452,027</b>	<b>3,785,246</b>	<b>4,793,467</b>	<b>4,964,448</b>
<b>Less</b>					
Operating Costs*	892,943	892,943	892,943	892,943	892,943
Donor funding costs	60,000	2,165,500	352,500	500,000	500,000
<b>Total operating costs</b>	<b>952,943</b>	<b>3,058,443</b>	<b>1,245,443</b>	<b>1,392,943</b>	<b>1,392,943</b>
<b>Net Income for Marketing Spend</b>	<b>1,089,054</b>	<b>1,393,584</b>	<b>2,539,803</b>	<b>3,400,524</b>	<b>3,571,505</b>

\*These costs assume donor agency support for the DG of the NCT, the industry advisor and the marketing executive.

Increases in the tourist levy are based on an estimated growth of tourist arrivals at 5% per annum and an increase in the levy to US\$15 in 2011(Q4) and US\$20 in 2012 (Q4). We have assumed all donor agency funds are spent on capacity planning, technical assistance and product improvement and not on marketing and international promotion. These funds have been itemised up to 2013 when it is assumed that some level of agency support will continue.

## 7.8 The Impact of this Increase in Tourism Activity

Although modest, the impact of an annual average increase in tourism arrivals, matched with a move toward higher spending tourists, both on package holidays and as independent travellers, the impact on the Gambian economy will be significant. This impact will be felt through increases in employment, contribution to GDP and increased export earnings. In addition the business plan presented will make significant moves into increasing the inclusion of the Gambian community within tourism.

Employment impact is the most immediate and measurable benefit to increased tourist activity; for every new bedroom added to supply a further two jobs within the industry are created. On publication and implementation of the Business Plan we would be confident that two known development projects may be encouraged to proceed; Qatari Diar have shown interest in developing a tourist beach resort, and we are aware of a privately funded Wild Life Game resort under consideration. Should these two developments proceed a further 400 jobs could be created over the coming years.

The ratio of the contribution tourism makes to GDP is less well documented or measured. The following extrapolation of the contribution of tourism revenues to GDP in 2009 is based upon a document compiled by the Overseas Development Institute in 2008 entitled 'The Gambian Tourist Value chain and Prospects for Pro-Poor Tourism'. This document sought to measure the tourism contribution toward poverty reduction, and drew upon consumer research originally published within the TDMP in 2005.

In identifying the level of tourism revenues in 2009 we have followed the logic set in this report, based upon the following assumptions:

- Tourist arrivals in 2009 as measured by the GTA at 119,017
- 84% of tourist arrivals are assumed to be on a full tour operator package, of which 73% visit during high season.
- The package cost identified in the ODI report for high season visitors is £650, this has been increased by 5% and converted to US\$ at a rate of \$1.50 to £.
- The travel cost of non package tourist arrivals is estimated at \$750 in the high season and \$825 in the low season
- Additional spend by package arrivals was estimated at dls1,400 per day on an average length of stay of 10.8 days. This has been inflated at 6% over two years and converted to US\$ at dls26 to the \$.
- Non package additional spend was based on dls1850 and has been treated as above.

This has produced estimated total tourism revenue for 2009 at US\$193.7 million, as shown in Table 7.9

**Table 7.9 Tourism Revenues Calculation 2009**

	<b>2009 Estimated Total Revenues US\$</b>	<b>ODI 2006 levels Total Revenues US\$</b>
<b>Total tourist arrivals</b>	119,017	110,815
<b>Package arrivals</b>		
84% of arrivals are on package, 73% of these are high season		
High season package arrivals	72,981	
low season package arrivals	26,993	
High season package cost (was £650) add 5% x1.5 to US\$	1,024	
low season package costs (was £530) add 5%x1.5	835	
<b>High season package revenues</b>	74,714,528	66,252,965
<b>Low season package revenues</b>	22,532,453	19,980,609
<b>Non Package air travel</b>		
high season flight was £265 in 2006 say £500	750	
low season was £285 say £550	825	
Non package flight arrivals high season	13,901	
non package flight arrivals low season	5,142	
<b>non package high season arrivals revenues</b>	10,425,889	
<b>non package low season arrivals revenues</b>	4,241,766	10,638,240
<b>Out of Pocket package expenditure</b>		
in 2006 dls 1,400, add 2 years inflation at 6%	60.50	
average length of stay is 10.8		
total bednights	1,079,722	
<b>total out of pocket package spend</b>	65,324,856	37,565,102
<b>Non package out of pocket spend</b>		
tourists not on a package at 10.8 nights average length of stay	205,661	
in 2006 spend was dls 1850, add inflation and x26	79.95	
<b>total out of pocket non package spend</b>	16,442,311	9,455,162
<b>Total Tourism Value Chain</b>	<b>193,681,803</b>	<b>143,892,077</b>

Inevitably The Gambia does not own the entire tourism value chain and significant levels of this income never reaches the country. The ODI report estimated that hotels derived some 34% of package revenues during the high season, this fell to 25% in the low season, Some 70% of air travel costs are leaked from this revenue source, and 10% of additional spend is absorbed by import costs. The net tourism revenues to the Gambia are estimated in Table 7.10.

**Table 7.10 Tourism Revenues not Retained in The Gambia**

	discount	2009 Estimates US\$	2006 ODI Study US\$
Package revenues not arriving in The Gambia			
high season at 66%	0.66	49,311,589	
low season at 75%	0.75	16,899,340	
Non package air travel	0.7	10,267,359	
Out of Pocket Spend	0.1	8,176,717	
Total Leakage		<u>84,655,004</u>	<u>66,190,355</u>
Net Tourism Revenues to the Country		<u>109,026,799</u>	<u>77,701,721</u>

In 2009 three major organisations, the African Development Bank, the UN Economic Committee for Africa and the Africa Union published an African Statistical Year Book which sought to identify key indicators to social and economic activity within African States. GDP in The Gambia was measured in 2007 (latest available data) at US\$696million. This has been inflated at 6.4% in 2008 to achieve a GDP in base values for 2009 at US\$740.6million. Net tourism revenues represent 14.7% of this estimated GDP in 2009.

This tourism revenue model has been applied to estimates of growth within tourism following the implementation of the Business Plan. GDP for the country has been grown at 5%, recognising the fluctuation in GDP as measured by the African Statistical Year book(2004 at 5.1% growth, 2005 at 2.1%, 2006 at 6.6% and 2007 at 6.1%). This theoretical extrapolation suggests that by 2013 Tourism could be contributing some 17% of GDP, at a net revenue value of US\$272.0million. These results are shown in Table 7.11.

**Table 7.11 Growth in Tourism Revenues 2009 - 2013**

	2009	Growth %	2010	Growth %	2011	Growth %	2012	Growth %	2013
<b>Tourist Arrivals</b>	119,017	100.0%	119,017	103.7%	123,476	105.9%	130,801	106.3%	138,981
Package High Season	72,981	1.00	72,981	1.05	76,630	1.07	81,994	1.07	87,734
Package Low season	26,993	1.00	26,993	1.03	27,803	1.05	29,193	1.05	30,653
Non Package High Season	13,901	1.00	13,901	1.00	13,901	1.03	14,318	1.05	15,034
Non Package Low Season	5,142	1.00	5,142	1.00	5,142	1.03	5,296	1.05	5,561
<b>Revenue Inputs</b>									
Package High Season	1,024	1.03	1,054	1.04	1,097	1.05	1,151	1.07	1,232
Package Low season	835	1.03	860	1.04	894	1.05	939	1.07	1,005
Non Package High Season	750	1.03	773	1.04	803	1.05	844	1.07	903
Non Package Low Season	825	1.03	850	1.04	884	1.05	928	1.07	993
Out of Pocket Package Spend	61	1.03	62	1.04	65	1.05	68	1.07	73
Average length of stay	10.8	1.00	11	1.00	11	1.00	11	1.00	11
Non Package out of pocket spend	80	1.03	82	1.04	86	1.05	90	1.07	96
Average length of stay	10.8	1.00	11	1.00	11	1.00	11	1.00	11
<b>Total Tourism Revenue</b>									
Package High Season	74,714,528		76,955,964		84,035,913		94,414,348		108,094,987
Package Low season	22,532,453		23,208,427		24,860,867		27,409,106		30,794,130
Non Package High Season	10,425,889		10,738,666		11,168,213		12,078,422		13,570,107
Non Package Low Season	4,241,766		4,369,019		4,543,780		4,914,098		5,520,989
Out of Pocket Package Spend	65,324,856		67,284,601		73,096,914		81,715,717		93,097,187
Non Package out of pocket spend	16,442,311		16,935,580		17,613,003		19,048,463		21,400,948
<b>Total</b>	<u>193,681,803</u>		<u>199,492,257</u>		<u>215,318,689</u>		<u>239,580,153</u>		<u>272,478,348</u>
<b>Less</b>									
Package high season	49,311,589		50,790,936		55,463,703		62,313,470		71,342,692
Package low season	16,899,340		17,406,320		18,645,650		20,556,829		23,095,598
Non Package air travel	10,267,359		10,575,379		10,998,394		11,894,764		13,363,767
Out of Pocket spend	<u>8,176,717</u>		<u>8,422,018</u>		<u>9,070,992</u>		<u>10,076,418</u>		<u>11,449,813</u>
Leakage	<u>84,655,004</u>		<u>87,194,654</u>		<u>94,178,739</u>		<u>104,841,481</u>		<u>119,251,870</u>
<b>Net Tourism Contribution</b>	<u>109,026,799</u>		<u>112,297,603</u>		<u>121,139,950</u>		<u>134,738,672</u>		<u>153,226,478</u>
Country GDP	740,544,000	1.05	777,571,200	1.05	816,449,760	1.05	857,272,248	1.05	900,135,860
Tourism Contribution Ratio	14.7%		14.4%		14.8%		15.7%		17.0%

## APPENDIX 1

### Simple Training Assessment Tool

	individual name	individual name	individual name	department averages	department sub-total
<b>competencies and behaviours examples.</b>					
1	Using and developing my knowledge.	5	3	8	114 6.3
2	Researching, investigating and problem-solving.	5	6	6	95 5.3
3	Communicating outwardly: face-to-face, phone, email, etc.	3	4	8	114 6.3
4	Listening and interpretation, establishing rapport, understanding needs.	3	6	8	96 5.3
5	Developing solutions and agreeing things with people.	4	6	8	118 6.6
6	Financial understanding and commercial ability.	3	3	8	97 5.4
7	Speaking and presenting to groups.	3	3	7	68 4.0
8	Helping or coaching or teaching or training others.	4	5	7	90 5.0
9	Using information and communications technology (ICT or IT).	4	4	3	71 3.9
10	Technical appreciation and use of equipment/tools/machinery for my area and related areas.	6	7	1	120 6.7
11	Understanding and making the most of my relationships with people and groups.	6	6	8	112 6.2
12	Competitor/industry awareness and consideration of these factors in planning, decision-making, etc.	3	6	5	75 4.2
13	Taking initiative and responsibility, e.g., decision-making, project management, running meetings.	4	5	7	90 5.0
14	Visioning, creating, and inspiring others with my ideas.	6	6	8	112 6.2
15	Managing time, planning, being effective, efficient, productive, and reliable.	6	5	9	101 5.6
16	Appreciating/applying social responsibility, sustainability, humanity and ethical considerations.	7	4	5	110 6.1
	<b>totals</b>	<b>72</b>	<b>79</b>	<b>106</b>	
	<b>averages</b>	<b>4.5</b>	<b>4.9</b>	<b>6.6</b>	
<b>Examples of behaviour and style</b>					
1	Striving for personal development.	6	7	7	125 6.9
2	Taking personal responsibility to resolve problems, even those not of my own making.	9	4	8	128 7.1
3	Understanding the way people really feel.	9	6	6	121 6.7
4	Developing positive relationships.	7	8	5	122 6.8
5	Keeping focused and productive, reliable and dependable.	7	7	8	128 7.1
6	Planning how to achieve my work and personal goals.	7	6	6	107 5.9
7	Managing stress and conflict.	7	5	5	100 5.6
8	Managing upwards and sideways (my managerial superiors and my peers).	7	8	7	108 6.0
9	Contributing positively to team/company morale and spirit.	7	8	7	124 6.9
10	Seeking and picking up responsibility that I see waiting to be filled.	9	5	5	110 6.1
11	Team-working.	6	4	8	111 6.2
12	Having compassion and care for others.	8	4	4	107 5.9
13	Using integrity and ethics in my judgement about work and organisational issues.	9	8	8	132 7.3
	<b>totals</b>	<b>98</b>	<b>80</b>	<b>84</b>	
	<b>averages</b>	<b>7.5</b>	<b>6.2</b>	<b>6.5</b>	



**APPENDIX 2.**

**Action Point KPI's listed by individual**

**Director General NTC KPI's**

ACTION	OBJECTIVE	IMPLEMENTATION APPROACH	TIMESCALE	RESOURCES REQUIRED		PERFORMANCE MEASURE
				US\$	Provider	
Prepare Five Year Corporate Plan for the NTC	Identify the key objectives from the recommendations of the TDMP and GTA Review, and other priorities and work toward implementation	Incorporate the NTC as recommended, appoint appropriate Board of Directors, appoint a non executive expatriate director as industry advisor, set up departments and begin task and process management	Commence five year plan by end 2010			Business Plan is implemented. All TDMP and GTA Review action points are implemented.
Review of all-inclusive policy	To meet market demand for the all inclusive product, without which any significant re-launch to tour operators is not plausible.	Review experience of Sheraton, assess impact as a resort or as a market segment to the hotel. How best to roll out into other hotels	By end 2010	nil		Document to drive product expansion based on Sheraton experience available to sell into other hotels.
Prepare job descriptions in consultation with staff	Ensure all staff within the two entities have agreed job descriptions	Agreed Job descriptions for all roles	As managers are employed	nil		All staff have signed and agreed job descriptions
Capacity building in classification and licensing and regulation as a basis for a quality drive for hotels and restaurants	Establish a team of suitably qualified inspectors to inspect and measure such aspects as standards, health, safety and hygiene, fire regulations and other specific areas that will, in time be incorporated.	Lessons from the recent classification of hotels to be identified and used to formulate a plan to ensure all aspects of objective measurement and analysis can be covered. Seek expatriate TA in training staff and establishing routines and processes.	Spring 2011	\$50,000	Donor agency for TA and training support	Clearly defined inspection process that leads to rising standards across all tourism product

Institute annual tourism awards	To encourage operators to increase standards of service and physical product provision	Identify award programme, potential sponsors, roles and responsibilities.	2012	\$5,000	Commercial sponsors	Stakeholders incentivised by annual awards programme.
The development investment process. To include progress toward an all sector investment conference in 2011	Develop tourism investment with competitive streamlined process and incentives and conduct an investment conference	Review process with GEIPA and transfer responsibility to NTC, streamline processes, improve capacity, legal review of process, grant support and tax concessions	November 2011	\$250,000	Donor support for an all sector Investment programme	Inward tourism investment is increased and process made more efficient for all parties. Conference used to sell new projects to investors.

**Chief Executive Officer NTB KPI's**

ACTION	OBJECTIVE	IMPLEMENTATION APPROACH	TIMESCALE	RESOURCES REQUIRED		PERFORMANCE MEASURE
				US\$	Provider	
Design and implement a Marketing programme aimed at attracting new higher level business: TA and financial assistance	Develop a marketing plan for implementation over a five year period	Focus on key marketing indicatives such as direct contacts with tour operators and much reduced activity at trade fairs	Implement from January 2011	Annual budget of \$3.0million	Donor agency, tourist levy and MofF contribution	Immediate impact through increased tourist numbers and, over time an increase in high spending tourists. Protection of existing source markets and introduction of new markets
Scheduled airline promotion	Identify potential new routes/carriers to expand the scheduled and charter air traffic into Banjul from Europe, maintain and support existing carriers. Identify those carriers at risk of defaulting.	Define target markets, airlines, routes and opportunities, create a work programme that takes NTB and GCAA through all the options on a systematic approach, what can they reasonably expect, how to achieve it, incentives cost to the country.	Commence January 2011	\$45,000	Donor agency support for study in routes planning	No current routes or carriers lost, new routes and carriers introduced within 12 months.
GCAA airline incentive schemes (dependent on outcome of scheduled airline promotion)	Appropriate and effective incentives offered to attract appropriate carriers, new routes that will be able to perform in a sustainable manner	Incentive schemes to be reviewed in light of the scheduled airline promotion. GCAA are in procession of a quote from air industry consultants to conduct this work	Commence March 2011	Unknown until outcome of review		All incentive schemes offered are shown to be cost effective and produce new routes/carriers
Prepare for increase in levy from £5 to \$20 per person in 2012-13, consultation and formal notice to	Charge a market level tourist tax which enables the Government to provide real and effective support to the industry.	Share the Business Plan aims and objectives with the tourism industry, ensure they are a part of the implementation programme and can see the benefits to be	On appointment	nil		Tourist industry accept the increased levy with no adverse reaction.

tour operators		derived.				
Prepare job descriptions in consultation with staff	Ensure all staff within the two entities have agreed job descriptions	Agreed Job descriptions for all roles	As managers are employed	nil		All staff have signed and agreed job descriptions

### Marketing Advisor KPI's

ACTION	OBJECTIVE	IMPLEMENTATION APPROACH	TIMESCALE	RESOURCES REQUIRED		PERFORMANCE MEASURE
				US\$	Provider	
Design and implement a Marketing programme aimed at attracting new higher level business: TA and financial assistance	Develop a marketing plan for implementation over a five year period	Focus on key marketing indicatives such as direct contacts with tour operators and much reduced activity at trade fairs	Implement from January 2011	Annual budget of \$3.0million	Donor agency, tourist levy and MoF contribution	Immediate impact through increased tourist numbers and, over time an increase in high spending tourists. Protection of existing source markets and introduction of new markets
Rebranding initiative: research in key originating markets, preparation of comprehensive branding programme and branding toolkit for The Gambia	Re-invigorate the tourism brand and ensure the image is consistently applied across all stakeholder involvement.	Define component parts and set out a programme that may be sent out to tender as a separate piece of work. Link with new web site creation currently under action, prepare simple new approach without rebranding the entire programme	Spring 2012	125,000	MoF/donor agency	New tourism brand, prepared to international standards, adopted by public and private stakeholders throughout.
Tour operator partnership schemes	To re-establish a substantial presence within the German market to maintain and expand business from existing markets and to begin the development of new	Link with international marketing and promotion campaign, set process controls and parameters. Provide capacity building over a period of time.	2011 onward	Larger share of a \$3.0million marketing budget	Donor agency, tourist levy, MoF.	Minimum of three partnership agreements in place by early 2012

	markets.					
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**Industry Advisor KPI's**

ACTION	OBJECTIVE	IMPLEMENTATION APPROACH	TIMESCALE	RESOURCES REQUIRED		PERFORMANCE MEASURE
				US\$	Provider	
Provide advice and guidance to industry stakeholders in the implementation of the tourism business plan	Achieve a step change in the activity and productivity of tourism support through dynamic product development and marketing efficiency.	Work closely with the MoTC, NTC and NTB to implement the business plan, ensuring that actions are taken on time, to budget and achieve agreed performance levels.	2 year contract	\$170,000	Donor agency TA support	Both parastatals operate efficiently and to set times scales and performance measures from day one.
Provision of tourism market data so the tourism sector has a measure of performance	Vigorous support to the tourism statistician as currently employed within the GTA	Implementation of land border tourism data to supplement airport statistics, use of UNWTO data resources to bench mark performance against competitors and make this data available to the whole of the tourism sector.	Immediate			Best use made of available data to measure performance of stakeholders and the industry.
Secure the future of 'Gambia is Good' and develop other similar programmes	To ensure the long term sustainability of GiG as a world class horticulture to tourism linkages project and the replication of this expertise into other poverty reduction efforts.	For GiG to be scaled up to penetrate the local market so that it has sufficient resources to be sustainable in the long term. Achieved through expanding craft market product and establish a wholesale market, expansion of farm management capacity in both numbers and knowledge base.	\$150,000	Donor agency	Stronger more dynamic GiG activity throughout the country and duplication of its effort in other areas.	

**Director of Development NTC KPI's**

ACTION	OBJECTIVE	IMPLEMENTATION APPROACH	TIMESCALE	RESOURCES REQUIRED		PERFORMANCE MEASURE
				US\$	Provider	
The development investment process. To include progress toward an all sector investment conference in 2011	Develop tourism investment with competitive streamlined process and incentives and conduct an investment conference	Review process with GEIPA and transfer responsibility to NTC, streamline processes, improve capacity, legal review of process, grant support and tax concessions	November 2011	\$250,000	Donor support for an all sector Investment programme	Inward tourism investment is increased and process made more efficient for all parties. Conference used to sell new projects to investors.
Linkage of mainstream travel industry with community development and poverty alleviation	Promote further poverty reduction measures already begun within The Gambia	Work with the tour operator market to nurture cross sector inclusion in tourism activities, including, cultural, food provision, man power, entertainment, local projects that support- add to tourism infrastructure.	On-going	Initial funding for business plan and project definition \$50,000	Donor agency and tour operator market	Greater inclusion of the community within tourism industry and reduced numbers in poverty.
Review of all-inclusive policy	To meet market demand for the all inclusive product, without which any significant re-launch to tour operators is not plausible.	Review experience of Sheraton, assess impact as a resort or as a market segment to the hotel. How best to roll out into other hotels	By end 2010	nil		Document to drive product expansion based on Sheraton experience available to sell into other hotels.
Festival programme for Gambia to enhance tourism – music, entertainment and cultures.	Encourage greater use of cultural activity to support tourism product	Identify potential programme of events, resources to organise, potential sponsors, assess potential to attract events from outside the country, i.e. international festivals.	On-going	nil		A festival programme with strong international attraction and acclaim is established

**Manager Research and Data NTC**

ACTION	OBJECTIVE	IMPLEMENTATION APPROACH	BY WHOM		TIMESCALE	RESOURCES REQUIRED		PERFORMANCE MEASURE
			Responsible Person	Supervisor		US\$	Provider	
Research with EU tour operators on required product improvements in The Gambia to attract higher spending customers.	Ensure that the product base is appropriate for market need and addresses changes in market expectations	Prepare bench marking tools, processes for updating data on competitive holiday destinations, capacity building by market advisor. Direct contact with tour operators on regular basis.	NTB manager research and data	CEO	On-going	nil		Accurate bench mark data on competition and market needs and expectations. Tour operators have the product they want to sell.



Director of Quality and Control NTC KPI's

ACTION	OBJECTIVE	IMPLEMENTATION APPROACH	BY WHOM		TIMESCALE	RESOURCES REQUIRED		PERFORMANCE MEASURE
			Responsible Person	Supervisor		US\$	Provider	
Devise and implement Bumster programme	Remove bumsters from key tourist areas – beach, airport, visitor attractions and provide work/incentives to lead to productive activity	Tourist Police Information Centres at airport and Cape Point. Employ bumsters in beach cleaning duties. Funding provision to Fajara Barracks for meals on duty, uniforms, fuel, and provision of three vehicles. Purchase a beach cleaning vehicle for Kololi TDA beaches	Director of Quality and Control	DG of NTC	All elements in place by November 2010	Start up costs of \$85,000  On-going costs at \$500 per month.  Acquisition of a beach cleaning vehicle \$28,000	Donor Agency.	Information points are manned by military staff in casual, non threatening clothing, at key points where tourists can access them for assistance.  Bumsters actively employed and no longer hassle tourists.
Establish minimum standards for hotels and restaurants	To maintain and improve on the hotel classification and licensing system recently introduced	Review hotel classification system, identify strengths and weaknesses, recommend improvements. Training programmes for inspectors, processes to follow in licensing new product, re-licensing, de-licensing. TA provision in long term particularly with health, hygiene and safety inspections.	Director Quality and control	DG	On-going TA and training for health and hygiene by January 2011	\$25,000	Donor agency TA and training budget	System improves hotel quality and fewer non-licensed hotels in operation. Inspectors trained to conduct specialist work to high standard.

### Human Resources NTC KPI's

ACTION	OBJECTIVE	IMPLEMENTATION APPROACH	TIME SCALE	RESOURCES REQUIRED		PERFORMANCE MEASURE
				US\$	Provider	
Training of local tour guides with pilot programme at a location to be decided	Ensure that existing and new guides are fully trained	establish a training programme with local help to train up trainers to train in the future.	Summer 2011	\$20,000	Donor agency	All trainers are appropriately qualified for their role and this is certified.
Institute annual staff appraisal process	Ensure all staff are appraised to match skills, training needs and resources to achieve individual goals and KPI's	Adopt an appraisal procedure and train all line managers in its use and benefits	Instigate as staff are appointed	\$10,000 for TA training and support	Donor agency	All staff are comfortable with the process and able to follow it on a regular basis

### Development Manager NTC KPI's

ACTION	OBJECTIVE	IMPLEMENTATION APPROACH	TIME SCALE	RESOURCES REQUIRED		PERFORMANCE MEASURE
				US\$	Provider	
Tourism awareness programme	Improve understanding and awareness of the industry throughout the community.	Create a policy guide of how the tourism institutions should maintain country wide awareness	On-going	nil		Greater awareness of the importance of the tourism industry throughout the community.

**All Line Managers KPI's**

ACTION	OBJECTIVE	IMPLEMENTATION APPROACH	TIME SCALE	RESOURCES REQUIRED		PERFORMANCE MEASURE
				US\$	Provider	
Identify individual staff training needs in relation to the identified needs in the corporate plan	Ensure all new and existing staff are appropriately qualified and trained to meet their KPI's and have a development programme for improvement	Assess current staff against job descriptions and develop capacity programme for each employee, conduct same exercise for all new positions	As staff are appointed	nil		All staff have agreed KPI's, understand targets and receive appropriate training and support to achieve these.

## Appendix 3

### The All-Inclusive Offer

The all-inclusive product (AIP) concept refers to a package of pre-selected services, which are included in a pre-paid price. In general the pre-selected services of an AIP can be characterised into two distinctive service packages:

- Standard Service Package (SSP)
- Variable Service Package (VSP)

The SSP includes services, which are common to all all-inclusive holidays in general, whereas the VSP depend on the specific offer of the individual hotel.

The SSP includes:

- airport transfers, baggage handling, government taxes
- room, breakfast, lunch and dinner from buffets
- local alcoholic and non-alcoholic drinks

The last two components offer large margins for cost-reduction. Depending on factors such as high or low occupation rates, the all-inclusive package can offer a standard room rather than higher room categories. The costs for food and beverages, which in The Gambia represents the highest cost factor for hotels can also be kept at a lower level by offering buffets and utilising food & beverages sourced through local suppliers.

The VSP may include a wide variety of activities and service provision, these are generally based on the following:

- Snacks and drinks between the meals in different forms e.g. afternoon tea/ coffee with cake and biscuits or hot & cold beverages throughout the day as well as snacks of the day at a specific bar, etc.
- Entertainment on specific times during specific days and/or evenings for specific customer segments e.g. children's entertainment, evening entertainment e.g. musical performers, dancing, etc.
- Sports during specific times and according to availability as well as the individual characteristic of the specific hotel e.g. Tennis court,

**The following examples of classical AIP product offering indicate the current trend**

**with SSP and VSP provision:**

#### **AIP of Thomas Cook Germany and the services included for a hotel in Egypt**

Transfer to/from hotel

**Meals:** Breakfast buffet from 7-11am in the main restaurant "Andalusia", lunch buffet from 1-3pm also in "Andalusia". Additionally on offer Snacks from 2-5pm, coffee, tea and cake from 4-6pm, and dinner with reservation in the main restaurant from 6.30-10pm. Late night snacks at the Piano Bar. Soft drinks and juices; local alcoholic drinks, cocktails; coffee and tea from 10am to midnight. Weekly Oriental Show with Barbecue in the main restaurant from 6-10pm.

The following additional all-inclusive services are available at the beach:

Lunch buffet at the Arabesque Restaurant from midday-2pm. Ice cream (apart from Movenpick) is on offer at the bars. National alcoholic drinks and non-alcoholic drinks are on offer at the Bar Blue Horizon.

## **AIP of TUI Germany and the services included for a hotel in Turkey**

Transfer to/from hotel

**Meals:** Breakfast, lunch and dinner from the buffet. Afternoon coffee/ tea, biscuits and ice-cream with the meals. Local alcoholic and non-alcoholic drinks with the meals and at the bars as well 24h snacks. From 6-10 am alcoholic beverages are NOT provided.

**Sports:** Tennis court (rackets at add. Cost), table tennis, Darts, Beach volleyball, Fitness ground, Aerobic, Latin- and Belly dance courses.

Services that most commonly are not included in such packages and may attract a further charge, comprise the following:

- Meals at a-la-carte restaurants and bars of the hotel
- Spa-, Health- and Wellness-facilities
- Products from on-hotel-property (souvenir) shops
- Products from handicraft sellers invited to the hotel
- Tours and excursions offered by tour operators in or outside the hotel

### **Market overview**

#### **All-inclusive & packaged tours**

All the major European tour operators TUI Travel plc, Kuoni (Switzerland) and REWE Touristic Group (Germany) have stated that they are experiencing a high increase of booking figures for all-inclusive travel. Turkey and Egypt have undertaken aggressive marketing strategies in order to secure large shares of travel bookings in the packaged tour segment. For example, in the TUI Germany brochure "*Egypt, Turkey, Tunisia, Morocco 2010/11*" more than two thirds of hotels are either entirely all-inclusive or have an all-inclusive option. An allied aspect is the increasing inclusion of new hotels; Turkey has shown a growth of 10% in relation to new hotels offered through TUI. Egypt has an overall growth of 19% more contracted hotels with TUI for the winter season 2010/11

Appreciating the general state of the source markets and the recent recession they have been faced with in-between 2007-2009, the all-inclusive segment amongst packaged travel to sun, sand and sea destinations is one of the few segments which have seen moderate to good growth figures. In times of financial insecurity this product offers the unique option of having a holiday with full and easy cost control, especially important for those who just about able to afford one or two holidays in the next couple of years.

The tour operators have adapted their range of products to offer better value for money. They hope that by using the transformation year 2009 to keep increasing booking figures through price reductions of around 1-3% they will be leading the travel industry out of recession. (travelweekly.co.uk, Travel Analyses BAT(Germany)).

#### **Local economic impact of AIP**

In regards to tourism and especially all-inclusive tourism, there are three distinctive ways to interlink the local economy with the all-inclusive market.

- Employment of local residents
- Supplying goods and services which are not included in the package/ hotel offer
- Supplying goods and services which are of higher quality and/ or more exclusive than those offered within the all-inclusive package

### **Employment of local residents in all-inclusive hotels**

Employing local residents in the tourism sector is a significant way of ensuring that the benefits of tourism are channelled into the local economy. Local employees carry their salaries into the local communities and disperse them among family members as well as among local businesses. However, employing local residents requires that these are well trained and qualified, which is often claimed to be a major obstacle by leading international hotel chains or up-market resorts entering destinations especially in the less developed world. It is therefore vital especially for less developed countries to create internationally recognised training and curricula development opportunities either via maintaining a training institute in the country or enabling the acquisition of training opportunities easily across borders.

#### **Example Sandals – Jamaica**

Sandals Jamaica strongly supports employees participating in the governments 'Abroad work experience' scheme. This programme facilitates work experience in another country (in general to the US). In order to be able to apply for this programme Sandals has to issue a letter of recommendation.

Apart from this programme in-house and external training forms an important part of the working contracts at Sandals. Each employee has to receive a certain amount of obligatory training. This training is targeted at the specific working areas of each employee and comprises work relevant topics e.g. communication, customer service, hospitality, health issues, etc. Additionally there are also voluntary training programmes, which are supported by Sandals. Language courses and cross-training in other resorts form the essential part of the voluntary training programmes.

With its training curricula Sandals relies heavily on the National Hotel Management School, which complies with international hotel management standards and trains tourism staff from all over the Caribbean.

### **Supplying local goods and services to all-inclusive operators**

Apart from the additional spending by the tourists in the destination strong links between hotels and local producers of food, beverages and handicrafts facilitate major income for the local economy. Research in several small island states (e.g. Mauritius, Tobago, Jamaica, etc.) relying on large margins of foreign imports has shown that there is a trend towards targeting the hotel sector with local agricultural production.

### **Supplying ancillary goods and services to all-inclusive travellers**

Starting from the different forms of transportation (bus, car, bike, etc.) and reaching to specialised and high class restaurants there are several services (e.g. health & beauty, culture, entertainment & sports, handicrafts & local arts, etc.) that are in demand by all-inclusive and non-all-inclusive travellers likewise.

A research on the economic impact of the all-inclusive hotel sector in Tobago by the Travel Foundation UK evaluated that the individual local spending by all-inclusive travellers amounted to GDP16 per day or GDP 215 per holiday, contributing not less than 3.4% of GDP. This local spending was attributed to the following areas: local excursions (79% of respondents), car hire (52%), shopping (47%) and eating out (39%). A similar statement was given by Sandals the Jamaican all-inclusive operator, which stated that more than USD25.000 of additional spending was monitored in each of their resort per week (incl. Beauty treatments, souvenirs, etc.)

## The Development of the All Inclusive Product in The Gambia

Despite several policy adaptations in The Gambia concerning the banning and reintroduction of all-inclusive offers, there has been a lack of understanding in the strategic use of all-inclusive offers amongst other travel products in order to increase tourism arrival figures and tourism spend for the benefit of the local economy.

### AIP & Sheraton Gambia

The Sheraton Gambia has been successfully trying the AIP in the past winter season, experiencing the effectiveness of this product especially in the peak season when high volumes of travellers are most likely to use this kind of product. Therefore they are planning to continue the AIP. With this decision they are well prepared for the current booking and travel decision trend in the European source markets.

#### The current AIP of the Sheraton as published by The Gambia Experience:

Transfer to/from hotel

**Meals:** Buffet breakfast (06.30 – 10.30), Buffet lunch (12.30 – 15.00), Buffet dinner (19.00 – 22.30)  
Tea & coffee (10.30 – 17.00), Ice cream, waffles & pancakes (10.30 – 17.00)  
Beverages (09.00 – 23.00): Local spirits (Gin, Vodka, Whisky, Pastis), Local beer and house wine  
Mineral water, soft drinks & juices

Excludes Full bottles, Premium brands, special drinks and mini bar - these will be subject to an additional charge

10% discount on spa treatments

1 hour's free use of fitness room daily

Free activities - Table tennis, Billiards, Beach Volleyball, Darts



#### „Gambia is Good (GIG)“

The 'Gambia is Good' initiative, has been very successfully establishing networks of small and medium sized producers, which grow and harvest vegetables and other food products, which are supplied at preferential rates to the hotel sector. Additionally the cultivation and seed sampling side is used to showcase Gambian agriculture for tourists opening up further opportunities to link up local economic activities to the foreign tourism market.

In future these should aim to extend to areas such as flower cultivation, with visitors being able to take fresh Gambian produced flowers home at the end of their holidays. This initiative did start with donor assistance/ seed-money during the start-up phase. It will be vital for initiatives such as the GIG, to receive continued support and joint-working terms from the Gambian tourism industry as a whole.

### **Taking AIP Forward in The Gambia**

The tour operator survey, outlined within the marketing plan shows quite clearly that tour operators are of the view that The Gambia must provide a significant AIP at high standard if it wishes to maintain some credibility within the tour operator market.

Product provision must be the first step in addressing market need and expectation, there are a number of existing hotels that would benefit from a transition to AIP, matched with some investment in product improvement. This may be encouraged through the offer of grant or soft loan support from Government, followed by incentives linked with tax reduction and reduced import costs. The latter is important as quality alcoholic beverages attract high import costs and form a significant part of the operating cost of the AIP.

New product designed to operate as an AIP is essential if inventory is to match the quality and variety provided within the competitive destinations. This could be encouraged through land provision, grant and development support from Government.

### **Further link local producers with the tourism infrastructure**

The GIG initiative is an excellent opportunity to capitalise on those food items that can be produced locally. Joint-action and support areas (e.g, improving transportation facilities and routes) should be identified between the Tourism Ministry and the Ministry for Agricultural affairs as well as with representatives of GIG in order to stabilise and increase the market share of GIG within the hotel and restaurant sector.

### **Develop ancillary goods and services for all-inclusive guests**

There is a need to create market incentives and support for local entrepreneurs to produce goods and services that are in demand by foreign travellers in general and which are essential to providing amenity and activity to guests on an all-inclusive holiday. Bird watching, flora and fauna tours, river trips and four wheel drive trips up country can all feature within an AIP, alongside more frequently provided amenities such as sport, cultural entertainments and arts and crafts activity and sale.

### **Conclusion**

Taking the AIP concept forward is an essential pre-requisite to the re-invigoration of tourism in The Gambia. Its credibility and standing within its competitive set and among wholesalers in the industry is being damaged by the lack of quality product and product diversification. Given the impact of the recent economic recession and the continued growth of competitive destinations around the world, The Gambia has little choice but to commit to major tourism development and change, or face prospects of declining demand and ultimate failure of the tourism industry.

AIP alone will not resolve all issues but it will show a strong commitment to the industry, complemented by progressive improvement in product provision, services and general standards through the supply chain.