



SIERRA LEONE NATIONAL TOURISM MARKETING STRATEGY AND REBRANDING

Final Marketing and Branding Strategy and Implementation Plan

December 2021

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Executive Summary

This destination marketing and branding strategy and action plan was formulated under the direction of the Sierra Leone Ministry of Tourism and Cultural Affairs (MCTA) and National Tourism Board (NTB). It will guide the marketing of tourism for the next 10 years and includes a 5-year action plan with corresponding activities, tactics, targets and budgets. The strategy was formulated through a process of extensive research, field work and stakeholder consultations.

Current situation

The strategy is produced at a time when global tourism is in turmoil due to the impact of the COVID-19 pandemic. Being at the early stages of tourism development, Sierra Leone is in a good position to prepare for the expected global travel resurgence and to launch a well-planned tourism drive over the next few years, during the COVID-19 recovery phases. The country is well-placed to capitalize on post-pandemic travel trends such as a renewed focus on sustainable travel, a growing demand for authentic and “off-the-beaten-track” destinations and experiences, the evident growth in adventurous travel and a growing travel appetite among younger generations.

Such growth potential is evident from the rapid recovery and growth in tourism arrivals to Sierra Leone between 2016 and 2019 (prior to the COVID-19 pandemic), with the country’s tourism market composition shifting substantially in favor of leisure travel.

Sierra Leone’s relative proximity to major tourism markets in Europe, long-standing relations with the USA, expansive and beautiful coastline with uncrowded beaches and offshore islands, pristine tropical rainforests, mountainous topography and cultural diversity are key ingredients for a vibrant and growing tourism sector. Above all, the resilience, authentic hospitality and positive spirit of Sierra Leoneans provide for an emotionally uplifting travel experience. The country is particularly well poised to capitalize on nature-based (eco) tourism, low-density beach tourism and special interest niches such as “roots” (diaspora) travel, bird watching, sport fishing, hiking and volunteer tourism. In addition, increased awareness of the potential for tourism among Sierra Leoneans has highlighted the potential of domestic tourism growth.

Despite this growth potential, market research conducted in formulating the strategy has emphasized the major task facing tourism authorities in addressing lasting market perceptions related to past conflicts, disasters and health events. Much needs to be done to establish a fresh destination image of peace, safety, freedom of movement, hospitality and marvelous tourism experiences. On a positive note, the market research has found that, once travelers have visited the country, their perceptions immediately change for the positive.

A comparison of Sierra Leone with potential competitors in Africa, confirms that the country’s competitive advantage lies primarily in its coastal and marine resources, combined with its eco-tourism assets. Sierra Leone has an opportunity to learn from the challenges facing mass tourism destinations in the region and focus its strategy on higher-value, lower-volume markets. A higher value-lower volume strategy is also suitable for ensuring visitor health and safety, especially in the wake of COVID-19.

In adopting such a value-based strategy it will be important for Sierra Leone to develop and grow a market position that clearly sets it apart from competitors. Business-to-business (B2B) marketing activities should be highly targeted and personalized and investment in digital consumer marketing should be substantially increased and strengthened.

In summary, main opportunities and challenges relating to the destination marketing mix (product, price, place/distribution and promotion), which are addressed by the strategy include:

- *Product development and packaging:* following a path of sustainable tourism development and avoidance of mass tourism, improved packaging of tourism experiences, developing special interest and niche tourism products and experiences, expanding the variety and quality of tourist accommodation through effective investment promotion, raising community awareness and understanding of tourism, expanding visitor amenities and ensuring adequate health, visitor security and other risk-management services
- *Destination pricing and value:* communicating a value-for-money proposition and offsetting perceptions of the destination being “expensive”, promoting competition in the sector, improving flight access from key markets, and improving service levels in hospitality establishments and tour companies
- *Destination promotion, branding and image management:* launching and promoting a differentiated positioning and attractive destination brand, countering lingering market perceptions tied to past conflicts and health risks, ensuring synergy in promoting a common brand identity among NTB and its private and public sector partners, capitalizing on the growing promotional power of digital media and promoting domestic tourism and travel awareness
- *Travel channel and distribution system development:* following a diversified and targeted business-to-business (B2B) marketing approach, strengthening the inbound tourism operator network, and expanding the range of international travel offers and partnership in key markets
- *Human resources and institutional development:* spearheading a “whole of government” approach in promoting and delivering tourism, building effective public-private marketing partnerships in promoting the destination, ensuring adequate and consistent promotional funding, strengthening NTB’s institutional capacity and improving performance measurement and market intelligence

Future strategy

Vision and objectives

The marketing vision is that:

“By 2030, with the global tourism industry having fully recovered from the COVID-19 pandemic, Sierra Leone will rate among the fastest-growing tourism destinations in Africa and the world. The efforts of the government, working hand in hand with the private sector to develop a higher value brand of sustainable tourism, will have paid off. Tourism will increasingly be valued by all divisions of Government, the business sector and civil society at large as a leading vehicle for job creation, economic growth, nature and culture preservation and social harmony.”

In achieving the vision, by 2030:

- The country will receive at least 111,000 visitors p.a.¹.
- Tourism will sustain in the order of 1,600 direct and 3,200 indirect jobs across the tourism value chain².
- The industry will directly generate approximately US\$93 million in foreign exchange per annum³.
- Accommodation in Class 1 and 2 establishments will increase from the current 1,180 rooms to 2,088 rooms⁴.

¹ Based on visitor arrivals having recovered by the end of 2024 to pre-COVID levels of 63,000, and growing at an average 10% p.a. thereafter

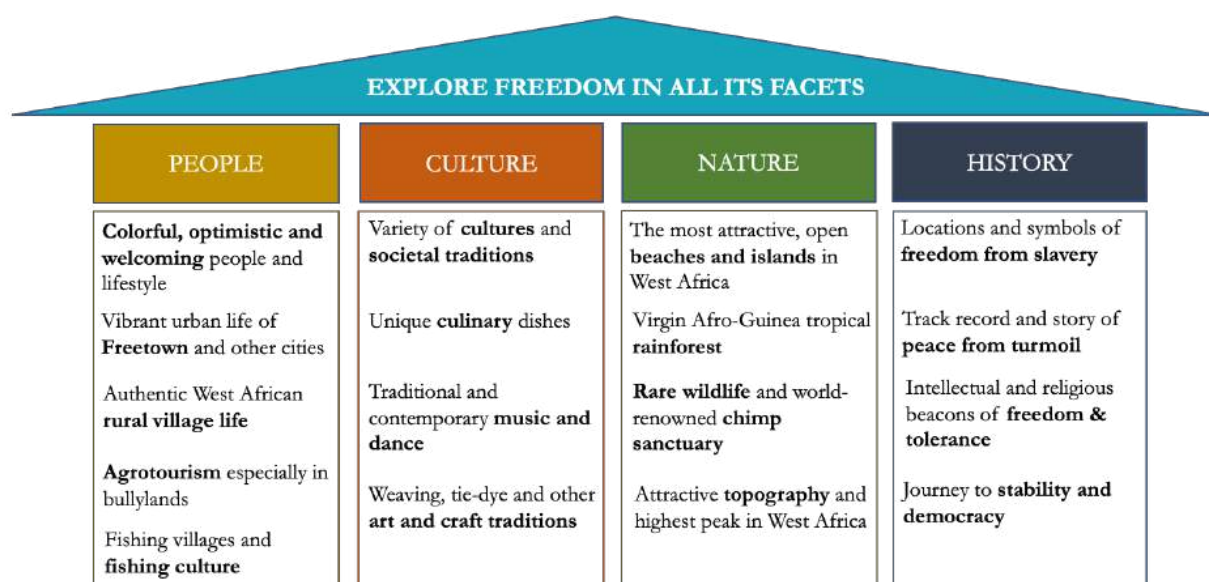
² Based on 1 direct and 2 indirect jobs being created by every 30 additional visitor arrivals

³ Calculated as 111,000 arrivals x US\$120 expenditure per day and staying 7 days on average

⁴ Room numbers supplied by NTB

Tourism market positioning and branding

The selling proposition that will differentiate Sierra Leone from competitors is that visitors are able to explore the true meaning of “Freedom” in all its facets in Sierra Leone, as manifested so boldly in the history, nature, cultural heritage, history and lifestyle of the people and the country. In promoting this positioning, destination marketing will focus on communicating the Unique Selling Points (USPs) as shown in the figure below.



Building on this selling proposition, Sierra Leone’s brand promise is distilled as:

“Sierra Leone is the realm of the free and it invites you to explore freedom”

As such, the tourism marketing slogan that will be used for promoting destination Sierra Leone is:

“Explore Freedom”

The destination brand identity (logo) to be used is as follows:



Creative, visual and communication guidelines for communicating the brand promise and brand personality are provided in the brand strategy document⁵, attached to this document.

The Minister of Tourism and Cultural Affairs should be the brand custodian and brand application should be managed by NTB. Regional brand champions could be appointed to ensure local brand ownership.

⁵ See Appendix 2: Full brand strategy

Target markets

During the next five years (marketing strategy Phase 1) NTB will focus its resources on attracting travelers from the following countries:

- *Core source markets:* Easier to convert and with higher growth potential, including the Americas (USA and Canada, capitalizing on Sierra Leone diaspora, historical ties and networks); Europe (UK, Germany, Benelux France and Scandinavia, capitalizing on market size, affinity for experiential travel, air connections and language affinity and ability) and West Africa (Ghana, Nigeria and neighboring countries, capitalizing on market proximity).
- *Captive source markets:* Easier to convert but with more limited growth potential, including Sierra Leone domestic market (with a focus on middle to upper-income households) and foreign expats in Sierra Leone (with a focus on foreign diplomatic corps, NGO staff, staff of International Cooperating Partners and international staff of foreign corporations).

The following market segments will be targeted during the next five years (Phase 1):

- *Intrepid Explorers:* General adventurous touring and exploration by couples and small groups. They prefer “hard” exploration - looking for the “real” Africa – are in search of extraordinary experiences and are prepared to go the extra mile, go to less visited places and sacrifice comforts to do so.
- *Mature Explorers:* Although still adventurous, they are more cautious than Intrepid Explorers and prefer “soft” exploration – fulfilling the explorer spirit and looking for somewhere different while considering risks. They will be lured by the mystique of Sierra Leone’s unique natural and cultural heritage.
- *Outdoor adventure and eco enthusiasts:* A collective segment of special interest adventure-sport and environmental enthusiasts. They are always looking for new experiences and locations and there is often a significant element of skill and/or risk involved. Key niches to consider are marine activities like sport fishing, kayaking, diving, surfing and windsurfing, etc. and terrestrial activities like hiking, adventure cycling, motorbiking, triathlon/endurance racing, long-distance trekking, etc.
- *SAVE travelers:* Comprises Scientific, Academic, Volunteer and Education tourism, with the two latter types comprising the largest niches within this segment. These are visitors who embrace travel to learn, explore, help and grow cultural and natural heritage preservation efforts and contribute to the improvement of local communities. For the purposes of this strategy the Sierra Leonian Diaspora are included here.

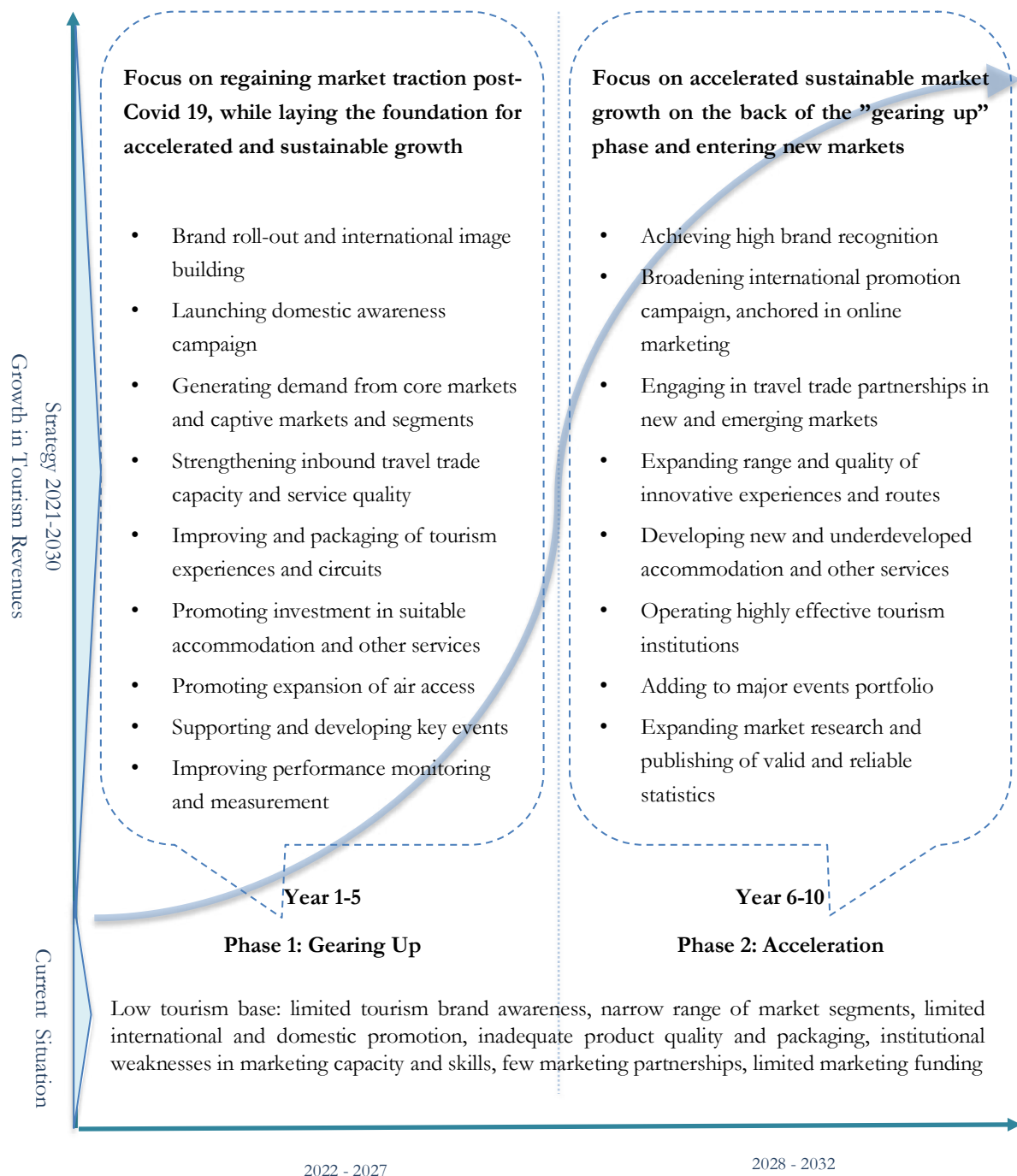
From year six onwards (Phase 2), NTB will consider expanding its market reach as follows:

- *From a source market perspective,* in addition to the core and captive markets, the focus could be expanded to include Potential source market, i.e. other countries in Europe (Italy, Spain), China, Russia and the Middle East (especially Saudi Arabia).
- *From a market segment perspective* and depending on the pace of product development, the focus could be expanded to include Luxury Explorers (mostly in exclusive eco lodges) and Inclusive Beach Holidaymakers (in larger beach resorts).

Implementation

Implementation phasing

Given the fact that Sierra Leone is in the early stages of the tourism destination life cycle, a phased approach is envisaged for building up tourism over the next 10 years, as presented in the figure below.



Implementation thrusts and strategies

Marketing implementation in the two phases will address improvement of the entire destination marketing mix (promotion, product, place [distribution channel] and price [value]), and will entail the following three thrusts and accompanied strategies:

Thrust 1: Destination branding and promotion	Thrust 2: Product development & packaging	Thrust 3: Effective delivery and value improvement
Strategies <ol style="list-style-type: none">1. Ensure well-branded and maintained marketing and information collateral<ul style="list-style-type: none">○ Phase 1: Rebrand existing print materials and improve digital media○ Phase 2: Refine digital technologies and platforms2. Implement a domestic travel and awareness campaign<ul style="list-style-type: none">○ Phase 1: Launch domestic tourism travel and awareness campaign○ Phase 2: Renew and adapt domestic tourism campaign in accordance with results of Phase 13. Implement an integrated international brand and image campaign<ul style="list-style-type: none">○ Phase 1: Focus on:<ul style="list-style-type: none">▪ Explorer, Adventure and Sport Enthusiasts and SAVE segments▪ Core Source Markets○ Phase 2: Focus on conversion in Core markets and segments and awareness in<ul style="list-style-type: none">▪ Beach Holidays▪ Investment Source Markets	Strategies <ol style="list-style-type: none">1. Package, develop and promote suitable tourism circuits<ul style="list-style-type: none">○ Phase 1: Scope , develop and promote main circuits○ Phase 2: Expand to include local circuits2. Package and promote suitable investment opportunities<ul style="list-style-type: none">○ Phase 1: Accommodation improvement and expansion in prime tourism areas aimed at Explorer, Outdoor Adventure and Eco Enthusiasts and SAVE segments○ Phase 2: Expand to additional areas, Luxury and Beach Holiday segments3. Launch a suitable tourism events program<ul style="list-style-type: none">○ Phase 1: Set up events program and launch the International Freedom Festival as anchor event with international and domestic appeal○ Phase 2: Expand events portfolio	Strategies <ol style="list-style-type: none">1. Strengthen private sector tourism delivery capacity<ul style="list-style-type: none">○ Phase 1: Institute a training, coaching and capacity building program for inbound tour operators○ Phase 2: Expand capacity building to include other industry sectors2. Strengthen tourism statistics, research and performance measurement<ul style="list-style-type: none">○ Phase 1: Collect, analyze and publish regular, valid and reliable tourism statistics and results of a tourism exit survey○ Phase 2: Expand information management and investigate the feasibility of a Tourism Satellite Account

Implementation activities

The following activities will be undertaken to implement the strategies outlines above.

- *Thrust 1: Destination branding and promotion*
 - *Strategy 1.1: Ensure well-branded and maintained marketing and information collateral:* including printed media (brochure, map and poster series); website and blog; social media platforms; newsletter, and image and video library
 - *Strategy 1.2: Implement a domestic travel and awareness campaign* (a detailed campaign plan has been produced) including: campaign planning, collateral production (e.g. special offer deals, jingles, pop-up stands, radio messages, billboards, social media platforms), campaign implementation (including editorial coverage on radio and TV, radio promotions/advertisements, outdoor billboards, social media competitions, schools competition, best tourism village competition, pop-up stand promotions, and annual Presidential Tourism Awards)
 - *Strategy 1.3: Implement #ExploreFreedom, a coordinated and integrated international brand and image promotion campaign* including: recruiting outsourced support for rolling out the campaign in key markets, international travel trade initiatives (joint marketing partnerships, selective trade fair participation, trade roadshows, fam trips), digital media consumer drive (website optimization, social media drive and advertising, digital content marketing, influencer marketing), a media and PR drive (journalist FAM trips, press coverage), marketing partnerships with special interest associations (special offer promotions), partnership with Sierra Leone Diplomatic Corp abroad (capacity building, office dressing), and conducting suitable market research and performance monitoring
- *Thrust 2: Product development and packaging*
 - *Strategy 2.1: Package, develop and promote suitable “Explore Freedom” circuits*, including Circuit 1: Mountains and Villages Route (with circuit spine Freetown- Makeni-Kabala); Circuit 2: Rainforest and Culture Route (with route spine Freetown-Bo-Kenema); Circuit 3: Oceans, Islands and Beaches Route (with route spine: Freetown-Moyamba-Bonthe) and Circuit 4: Freedom Route (including Freetown, Western Peninsula and Bunce Island)

Activities to implement include circuit planning (conceptualizing, setting up circuit forums, product inventory and auditing), circuit mapping and promotion (mapping, digitalization, promotion) and circuit improvement and product development (“hard” physical and “soft” human capacity and skills improvements)
 - *Strategy 2.2: Package and promote suitable hospitality investment opportunities*, including investment planning (destination master plan, investment portfolio development, pre-feasibility studies and framing investment conditions), investment packaging and promotion (investment profiles and prospectus, investment promotion plan, promotion execution), and investment proposal evaluation and award (receiving and evaluating proposals, negotiations, awarding contract and monitoring performance)
 - *Strategy 2.3: Launch a suitable tourism flagship events program*, including events support program set-up (program development and setting up a calendar of events), and launching the Sierra Leone International Freedom Festival (SLIFF) (conceptualizing the festival format,

conducting a feasibility study, soliciting funding partners, appointing an event organizer, promoting and staging the festival)

- *Thrust 3: Effective delivery and value improvement*
 - *Strategy 3.1: Strengthen private sector tourism delivery capacity* including establishing a capacity building and mentorship program for inbound tourism operators (needs assessment, soliciting donors, participant selection); program execution (training, mentorship, providing market access opportunities) and performance monitoring and quality assurance
 - *Strategy 3.2: Strengthen tourism statistics, research and performance measurement*, including improvement of tourism arrival statistics (gap analysis, working group setup, publishing a statistics barometer); execution of a regular tourism exit survey (outsourcing, survey planning and setup, execution and reporting) and investigating the feasibility of setting up a Tourism Satellite Account (build internal expertise, due diligence, execution)

Five-year costed action plan

The implementation activities are further elaborated in a detailed costed action plan that sets out annual budgets and performance indicators for each of the proposed activities.

Conclusion

This draft Sierra Leone tourism branding and marketing strategy charts the way for long-term sustainable growth in tourist arrivals to the country. The strategy recognizes the fact that Sierra Leone is at the early stages of the tourism destination life-cycle and as such it adopts a phased marketing approach, aimed at building up Sierra Leone's brand reputation and tourism economy in a responsible and sustainable manner.

Since the strategy shifts NTB's marketing focus, from primarily traditional business-to-business (B2B) channels to a combination of traditional B2B channels and new digital business-to-consumer (B2C) media, it is proposed that NTB's institutional capacity should be enhanced in the area of digital marketing, among others by:

- Appointing a dedicated digital marketing specialist on the marketing team and
- Engaging the marketing staff in ongoing digital marketing training, to empower them with the necessary skills for maximise digital destination marketing opportunities.

1 Introduction

1.1 Project Background

The Government of Sierra Leone (GoSL) has officially prioritized tourism under Cluster 3 of its New Direction Manifesto. The World Bank is preparing an Economic Diversification Project (SLEDP) in support of the manifesto, with one of the project components taking an integrated destination approach to improving the performance of Sierra Leone's tourism sector. This will be achieved through a mix of institutional and policy reforms, market development and national re-branding as well as building business-to-business (B2B) linkages and strategically developing tourism products in selected areas.

Sierra Leone has unique natural assets and an abundance of adventure and eco-tourism potential, but negative perceptions of the country based on the long civil war, Ebola outbreak and the recent mudslide continue to hinder the development of the country's tourism sector. Nevertheless, momentum is building with the recent announcement of the Chimpanzee being named the National Animal, and the catchphrase "Sierraously Surprising" being tested by the Sierra Leone National Tourism Board (NTB) in two international trade fairs.

The GoSL and stakeholders have made their commitment clear for the national marketing strategy to focus on ecotourism and sustainable tourism, and the pursuit of related niche markets.

This document provides the NTB with a national tourism marketing and brand strategy that is feasible to implement, resonates with tourism stakeholders and target markets, and embraces the importance of sustainability. The strategy project also kick-started implementation of key priority actions, including the rebranding of the destination, a social media marketing strategy, production of key collateral and marketing and brand strategy activation training.

The strategy will guide the marketing of tourism for the next 10 years and includes a 5-year action plan with corresponding activities, tactics, targets and budgets, which are in-line with GoSL budgets and capacities. The strategy places less emphasis on traditional print media and trade show visits and focuses more on digital marketing and earned media.

1.2 This report

This final strategy document follows the submission of a comprehensive Situation Analysis Report and incorporates stakeholder comments received on a draft Marketing and Rebranding Strategy Report.

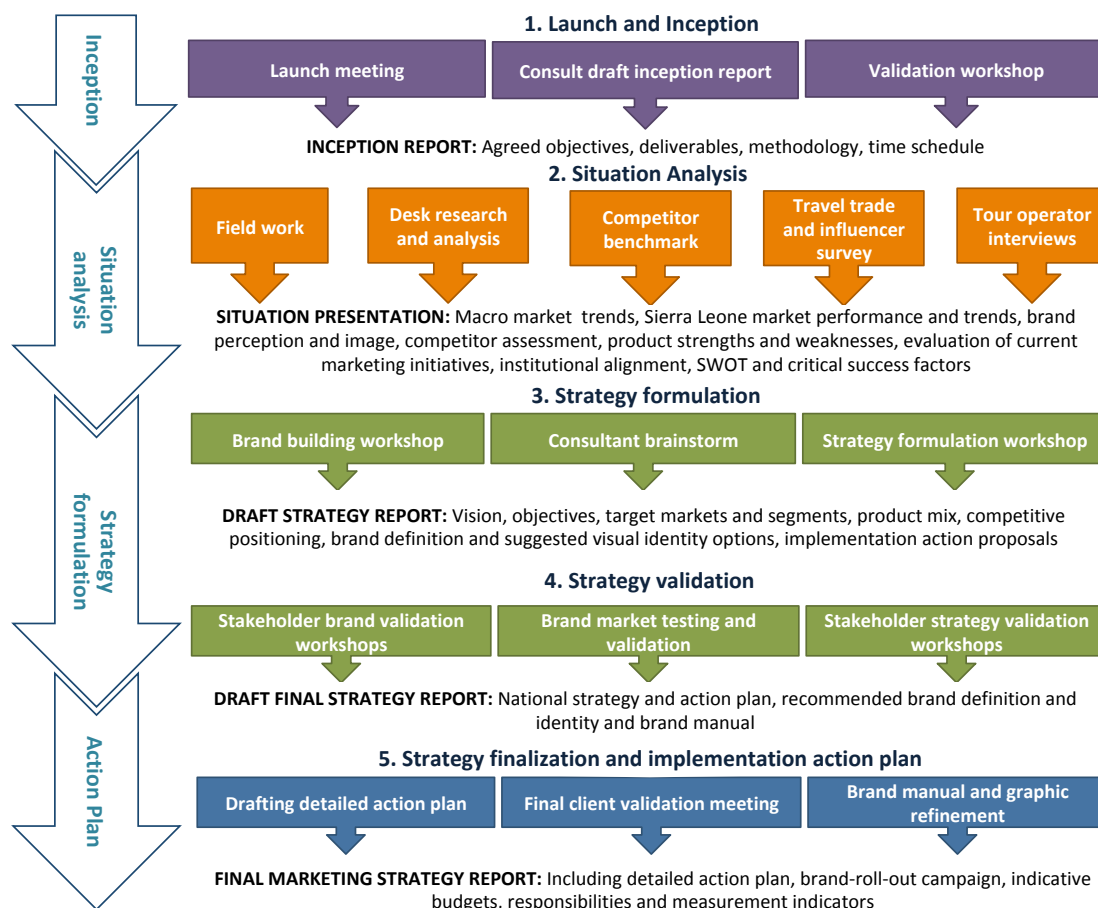
The report:

- Summarizes the key marketing and branding challenges and opportunities facing the country.
- Sets a future vision to strive for when marketing the country.
- Identifies destination Sierra Leone's future competitive positioning and differentiation.
- Establishes Sierra Leone's tourism brand personality, promise and essence and presenting a brand visual identity (tourism logo) and selling proposition (slogan).
- Outlines tourism target markets and target marketing priorities.
- Proposes product packaging and development opportunities to match the needs of target markets.
- Proposes an implementation phasing strategy and key marketing interventions for each phase.

- Provides a clear and measurable implementation action plan, including proposed activities, budgets and success indicators for guiding the implementation of the strategy.

Figure 1: Project Process and Methodology

Phase I: Strategy formulation



1.3 Methodology

A variety of methods were employed in formulating this marketing and branding strategy.

- *Field visit:* A 14-day field visit was undertaken by the full consultant team from 7 – 23 June 2021, during which all the main sites and attractions were visited and consultations held with tourism opinion leaders in all regions. The following sites were visited:

Tiwai Island	Bureh Beach	Sierra Leone Railway
Outamba Kilimi National Park	2nd Beach	Museum
Wara-Wara Hills in Kabala	York Beach	Fourah Bay College
Senekedugu Farm Village	Lumley Beach	St. George Cathedral
Rogbonkoh Village	Levuma Beach	Portuguese Steps
Estuary Resort, John Obey	Bunce Island	Freedom Tree
Kent Beach	Tasso Island	Martello Tower
Banana Island	Tacugama Chimp Sanctuary	Leicester Peak
Tokeh Beach	Sierra Leone National Museum	

- *Regional stakeholder workshops:* Brand building and marketing strategy consultative workshops were held during the field visit with regional stakeholders, attended by approximately 250 representatives in:

- Kenema (Eastern Region)
- Bo (Southern Region)
- Makeni (Northern Region)
- Freetown (Western Region)

NOTE: A summary of workshop contributions is attached as Appendix 3.

- *Online workshops:* An online branding workshop was held with NTB staff in May 2021.
- *Online consultative meetings:* The strategy has also been informed by two consultative meetings held with the local task team.
- *Stakeholder validation workshop:* The marketing and rebranding strategy was validated by more than 80 public and private tourism stakeholders during a workshop in Freetown during October 2021, where the draft marketing and rebranding strategy was presented to stakeholders.
- **Primary market research and assessment:** Such research was conducted through employing the following methods:
 - An in-depth telephonic survey among 31 international tour operators and trade partners who had promoted Sierra Leone in the UK, USA Europe and various other countries
 - Opinion leader brand interviews with 10 influential business and societal leaders with good knowledge of Sierra Leone
 - Survey among 71 bloggers (influencers) representing a mix of different age-groups, travel niches and audience demography
- **Secondary research:** Secondary analysis was conducted as follows:
 - Desk research and analysis of available internal policy, planning and operational documents
 - Competitor benchmarking of marketing and branding strategies of tourism authorities in Ghana, The Gambia, Rwanda, Tanzania and Guyana (South America)
 - A technical assessment of NTBs digital media i.e. the website, social media platforms and performance on third party travel platforms such as Google and TripAdvisor

NOTE: The results of the analysis and research conducted are contained in Report 2: Situation Analysis, which is available at NTB.

2 Current Tourism Situation

2.1 Overview

Sierra Leone is blessed with many assets that would make it an attractive destination for tourists originating from Europe and the USA. Noteworthy amongst these are the 570km of beautiful Atlantic coastline, dense tropical forest, which are home to some of the world's most endangered species, temperate climate, historic appeal to those of Sierra Leonean descent in the diaspora, and proximity to source markets and international hubs, just six hours' flight from Europe, 8 hours from the USA and 3 hours from West Africa's largest city, Lagos⁶.

There are also many opportunities to develop special interest market segments, from eco-tourism to sports fishing, hiking to cultural tourism, in addition to the incredible beaches that stretch along the coast. These are arguably "relatively pristine and less crowded" compared to Sierra Leone's regional rival The Gambia, which has become a popular European destination for mass tourism⁷.

However, a devastating civil war and Ebola outbreak have hamstrung Sierra Leone's tourism potential and growth in the past two decades, also serving to influence its destination reputation as war torn, poverty stricken and risky from a health and hygiene perspective, which in times of COVID is particularly concerning.

Indeed, the country was making good progress to achieving a tourism restart, before the global COVID pandemic in 2020, which has wiped out the positive strides that had been made to market the destination to a leisure market, as well as travelers with ancestral ties with Sierra Leone. The time is right to devise a focused and captivating tourism marketing strategy and brand for rebuilding tourism in the wake of COVID-19.

2.2 The global tourism environment

2.2.1 Impact of the COVID-19 pandemic on the tourism sector

Unfortunately, UNWTO predicts that emerging and developing countries, including many ECOWAS countries, will be among some of the hardest hit by the economic impacts of the COVID-19 pandemic. While Sierra Leone is no exception, with international arrivals declining by more than 61% in 2020 from 60,090 in 2019 to 24,456, the decline has been less severe than in other destinations.

Looking ahead, UNWTO has outlined two scenarios for tourism recovery in 2021. The first scenario points to a rebound in July, which would result in a 66% increase in international arrivals for the year 2021 compared to the historic lows of 2020. In this case, arrivals would still be 55% below the levels recorded in 2019. The second scenario considers a potential rebound in September, leading to a 22% increase in arrivals compared to last year. Still, this would be 67% below the levels of 2019.

The scenarios consider a number of factors such as a gradual improvement of the epidemiological situation, a continued roll-out of the COVID-19 vaccine, a significant improvement in traveler confidence and a major lifting of travel restrictions, in particular in Europe and the Americas.

The rebound is expected to continue in 2022 as travel conditions normalize and the pandemic is contained globally. However, international tourism could still take 2½ to 4 years to return to 2019 levels.

⁶ Sierra Leone Investment & Export Promotion Agency (2017) Tourism Sector Click [here](#)

⁷ World Bank (2009) Competitiveness Assessment of Tourism in Sierra Leone Click [here](#)

Ironically, the fact that Sierra Leone's is at the early stages of tourism development and that the value of the sector is still low, means that the tourism economic impact of COVID-19 has been relatively small, compared to countries with a heavy reliance on tourism. Since the global tourism "dial" has been turned back, Sierra Leone is in a good position to prepare for the expected global resurgence in travel and to launch a well-planned tourism drive over the next few years, during the COVID-19 recovery phases.

The following important trends and disruptions in the post-COVID-19 destination marketing space should be considered when designing the Sierra Leone destination marketing and branding strategy:

- *Seismic shift to digital in both B2B and B2C marketing* requires a major shift in NTB's marketing investment in favor of digital marketing mix. With visual and interactive applications growing in importance, NTB should scale up investment in digital marketing capacity building, maximizing of apps, involvement of third parties and domestic fan base, etc.
- *Increased segmentation and personalization*, with the shift to online powering a strong move from broad-based marketing to hyper-personalization. The requires focused and targeted marketing capitalizing on digital media meta-data segmentation and targeting abilities.
- *Trade fair disruption*, with international travel shows being likely to adopt a hybrid model combining a smaller live show component with a virtual component to cater for all stakeholders who wish to connect with their industry colleagues on the platform that suits them. NTB should reconsider the emphasis in traditional trade shows and travel trade marketing in its promotional mix and investment.
- *Consumer safety and security of paramount importance* and regulating and monitoring of COVID-19 and other health and safety protocols should receive priority. NTB should prioritize crisis communication and health assurances in rebranding and marketing messages.

2.2.2 Global tourism market trends of relevance to Sierra Leone

Various international travel trends that have emerged over the past decade are of relevance to Sierra Leone. It is expected that these trends will continue as the COVID-19 pandemic subsides. The following are some key emerging travel trends, as highlighted by UNWTO (www.unwto.org), Skift (www.skift.com)⁸, Intrepid Travel (www.intrepidtravel.com)⁹ and other leading tourism trend advisors.

Table 1: Global tourism market trends and implications for Sierra Leone's tourism marketing

Global trend	Implications for Sierra Leone Tourism
<p><i>Fast-growing preference for sustainable and responsible travel</i></p> <p>Environmental awareness is growing exponentially. Avoidance of "overtourism" destinations with a growing focus on outdoor experiences, low-impact destinations and socially responsible travel. Booking.com's Sustainable Travel Report (2021)¹⁰, suggests that the pandemic has been the tipping point for travelers to finally commit to their own sustainable journey, with two thirds (61%) stating that the pandemic has influenced them to want to travel more sustainably in the future.</p>	<p>Sierra Leone's tourism offer is embedded in its natural and cultural resources. It is well-positioned to capitalize on the trend towards sustainable tourism and all efforts should be made to advance and promote sustainable tourism management in the country, especially in the post-COVID era. Sustainable development of nature-based experiences should receive high priority.</p>

⁸ <https://skift.com/megatrends-2020>

⁹ <https://www.intrepidtravel.com/adventures/travel-trends-2020>

¹⁰ <https://globalnews.booking.com/bookingcoms-2021-sustainable-travel-report-affirms-potential-watershed-moment-for-industry-and-consumers/>

Global trend	Implications for Sierra Leone Tourism
<p><i>Authenticity and “getting way off track” are valued</i></p> <p>Travel has become a commodity – people have been everywhere, and “specialness” is a relative concept. Special attention, authentic experiences and tailored service offering that give travelers “bragging rights” are increasingly expected and valued.</p>	<p>The hospitable and innovative nature of Sierra Leoneans offers opportunities for personalized, interactive travel experiences. Skills development should be promoted and safe cultural tourism interactions with the region’s diverse cultures should be encouraged.</p>
<p><i>Time as a travel currency</i></p> <p>Leisure time is increasingly precious with “money-rich, time-poor” travelers demanding transparency and ease of travel planning, booking transport, removal of borders restrictions, etc.</p>	<p>The visa on arrival is a major step forward in easing visitor access. Seamlessness of immigration, air access to the country and to remote destinations and tourist public transport should be continuously improved.</p>
<p><i>Mobile technology and payment rules travel</i></p> <p>Visitors use mobile phones at all stages of the travel journey. Connected travelers could be our best or worst marketers and an attractive product or experience will promote or demote itself.</p>	<p>Easy and affordable of Internet connectivity should be improved, at least at main tourist sites in the country.</p>
<p><i>Personal health and safety are key travel deal breakers</i></p> <p>In the aftermath of COVID-19 and a growing global alertness to terror and crime, visitor safety, security and health are paramount decision-factors in travel planning.</p>	<p>Utmost priority should be given to setting in place and diligently implementing health and hygiene protocols related to COVID-19 and other diseases.</p> <p>Collaboration and coordination among public and private sector tourism and security authorities should be strengthened.</p>
<p><i>Crisis is the new norm</i></p> <p>The ability to manage tourism communication relating to health, security, environmental and other crises will become increasingly important.</p>	<p>A tourism crisis communication strategy should be set in action at country level.</p>
<p><i>The Millennial and Gen Z travel bug</i></p> <p>Millennial travel is growing throughout the world but is especially fast growing in emerging Asian markets. Millennials live for the “now”, share it now and look for instant gratification. Generation Z is fast emerging as a market force in tourism.</p>	<p>Special value offers should be developed for younger, adventurous and experiential travelers who are keen to engage hands-on with nature, cultural traditions and adventure activities. The creative industries and safe nightlife zones should be enhanced.</p>
<p><i>Growth of the shared economy</i></p> <p>Technological disruptions in accommodation, transport, dining and other sectors are common and destinations that embrace these have competitive advantage, but it comes with associated challenges.</p>	<p>Sierra Leone should embrace the shared economy as mechanisms for SME advancement and improved market access, especially to community based and new attractions and experiences, which may not be feasible to promote by the mainstream tour operators.</p>
<p><i>Increasingly segmented markets</i></p> <p>As people become more travelled the search for experiences that suit their specific tastes and interests increases – experiences need to be finely tuned in line with segment needs.</p>	<p>Public and private sector tourism leaders should be well versed in understanding the needs of existing and emerging market segments and incorporating these in travel offers and in development policies.</p>
<p><i>Geographic market shifts</i></p> <p>Markets in Asia and China are increasingly maturing and becoming sophisticated in travel needs; Russia has grown well over recent years.</p>	<p>Sierra Leone authorities should further strengthen and enhance their marketing relationships and partnerships in such growth markets. Tourism authorities should draw on available market research to capitalize on market shifts.</p>

2.3 Tourism trends in West Africa

Given the limited tourism statistics available and to gain a perspective on the potential of source markets and market segments for Sierra Leone, it is helpful to look at the status of other West African states, such as Ghana, Cote d'Ivoire and Nigeria – countries that fall within the ECOWAS economic block and share similar tourist features.

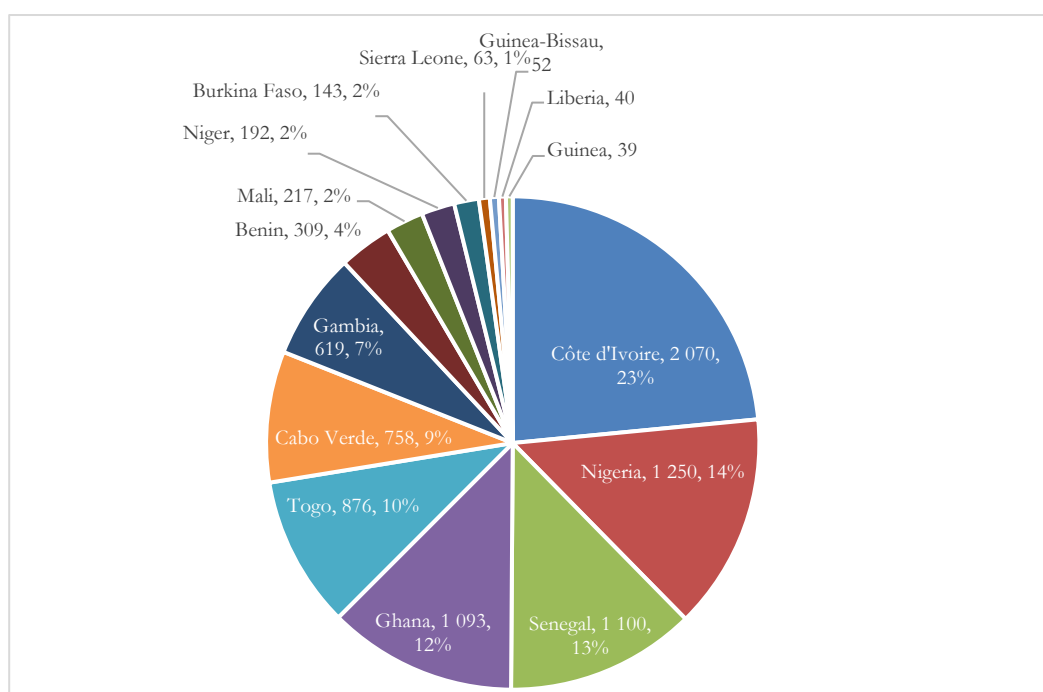
The tourism industries of these West African countries remain relatively under-developed compared with other countries and regions on the continent. ECOWAS countries attracted only 12.5% of foreign arrivals in Africa in 2019 and the region's share of share of tourism receipts is equally low. Subsequently, tourism contributes much less to the West African GDP (2.1%)¹¹ than in East Africa (4.5%) and Southern Africa (3.0%).

The 2017 UNCTAD report "Economic Development in Africa" indicates that the share of intraregional tourist arrivals in ECOWAS, as a percentage of total international tourist arrivals increased from 2012 to 2013 but was small (15% and 23% respectively). Intraregional (West African) tourist arrivals, however, accounted for 54% of all arrivals from Africa to ECOWAS countries in 2012 and 66% in 2013, suggesting that residents of the Community travel predominantly and increasingly within the Community.

As can be seen from Figure 2 below, seven of the ECOWAS Member States (Côte d'Ivoire, Nigeria, Senegal, Ghana, Togo, Cabo Verde and The Gambia) attracted approximately 88% of tourist arrivals to the region in 2019. Sierra Leone attracted only 1% of ECOWAS arrivals in 2019.

Given these imbalances it would be sensible for Sierra Leone to consider a tourism strategy that carves a special destination position in the market, pursues sustainable tourism development and delivers benefits to local communities and citizens, rather than chasing visitor volumes alone.

Figure 2: Estimated country shares of ECOWAS tourist arrivals ('000), 2019



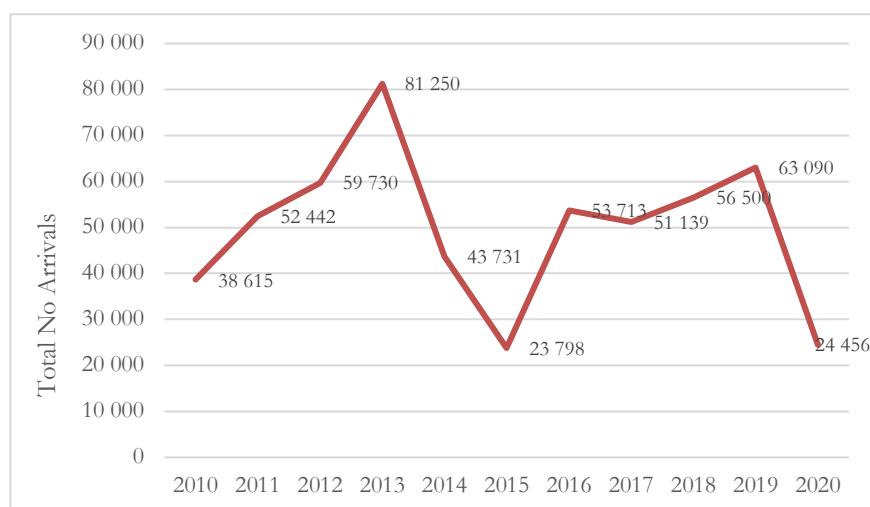
Source: UNWTO, 2021 and consultant estimates

¹¹ MPRA (2007) Analysis of the impact of tourism on the West Africa economy. Click [here](#)

2.4 Sierra Leone tourism market trends and character

2.4.1 Tourist arrival trends

Figure 3: Arrivals by Foreign Nationals to Sierra Leone, 2010-2020



While Sierra Leone's 63,000 foreign arrivals in 2019 (pre COVID-19) represents a significant increase of 39,000 visitors since 2015 (a CAGR¹² of more than 27%), arrival numbers are low in relative terms, with the country attracting only 0.7% of ECOWAS arrivals. The low foreign visitor base is indicative of the huge task

Source: NTB, 2021

at hand in developing the industry.

As can be seen from Figure 3, foreign arrivals increased sharply leading up to the 2012 elections until the Ebola outbreak, when numbers declined sharply. After the Ebola 'all-clear' in 2015, Sierra Leone's tourist arrivals climbed healthily until the 2020 COVID crisis, to the point where the United Nations World Tourism Organization (UNWTO) declared Sierra Leone the fastest-growing tourism destination in the world¹³. In 2020, tourist arrivals declined to 24,456 with no tourist arrivals recorded from April to July due to COVID-19 travel restrictions. Sierra Leoneans in the diaspora contributed a further 16,782 arrivals.

Figure 4: Foreign Nationals Arrival by Region of Nationality, 2010-2020

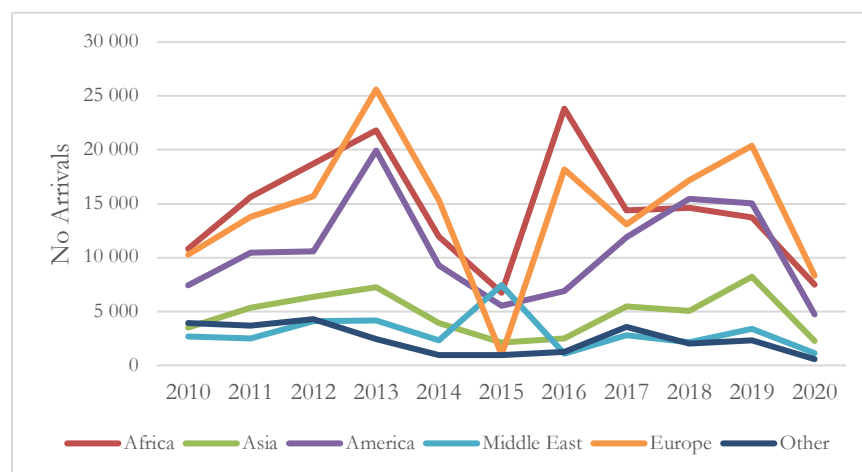


Figure 4 indicates the rapid recovery in visitor numbers from all world regions between 2016 and 2019. Most notable is the excellent growth achieved in arrivals from Europe and the Americas. On the other hand, the graph also illustrates the sensitivity of these markets to health and other crises, with arrivals of

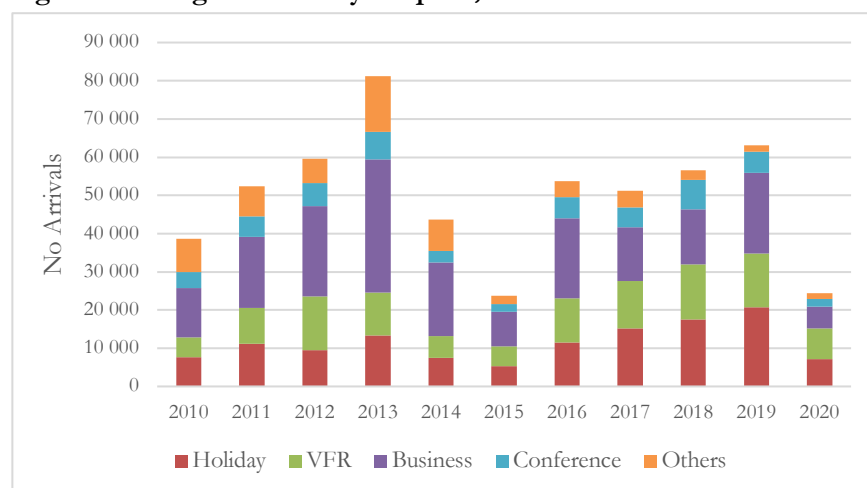
Source: NTB, 2021

from Europe plunging steeply with the advent Ebola in 2014 and 2015. Arrivals from Africa increased sharply in 2016, possibly for re-establishing business ties, but remained static from 2017 to 2019. Interestingly, arrivals from Asia, while still limited, increased substantially in 2019.

¹² Compound Annual Growth Rate

¹³ Travel Weekly (2019) United Nations World Tourism Organization unveiled its list of fastest-growing tourism countries in the world, and a surprising name took the crown. Click [here](#)

Figure 5: Foreign Arrivals by Purpose, 2010-2020



Source: Source: NTB, 2021

During the “normalized” period of 2016 to 2019 the composition of foreign arrivals changed considerably in favor of holiday visitors. While leisure (holiday) visitors and business visitors comprised 21.5% and 39% of arrivals respectively in 2016, the share of leisure visitors grew to almost 33% in 2019, with business visitors comprising 33% of arrivals. Total foreign arrivals (excluding Sierra Leone diaspora) grew by a compound annual growth rate (CAGR) of 5.5% over the period 2016 to 2019, while leisure arrivals grew at a rate of more than 21% per annum, VFR arrivals by 7% per annum and arrivals for business purposes remained stable.

These trends demonstrate Sierra Leone’s potential to rapidly grow its leisure tourism numbers under normalized market conditions.

2.4.2 Market characteristics

The tourism sector experienced good growth in the 1980s and early 1990s when heavy investment in beach and island-based infrastructure attracted French and Scandinavian holiday makers seeking “high-end sun, sand and sea tourism”¹⁴. This growth was interrupted by the civil war which decimated much of the tourism infrastructure, destination reputation and tourist arrivals until 2002 when the country began to claw back some of its gains, only to have the Ebola crisis interrupt that growth again from early 2014 to late 2015.

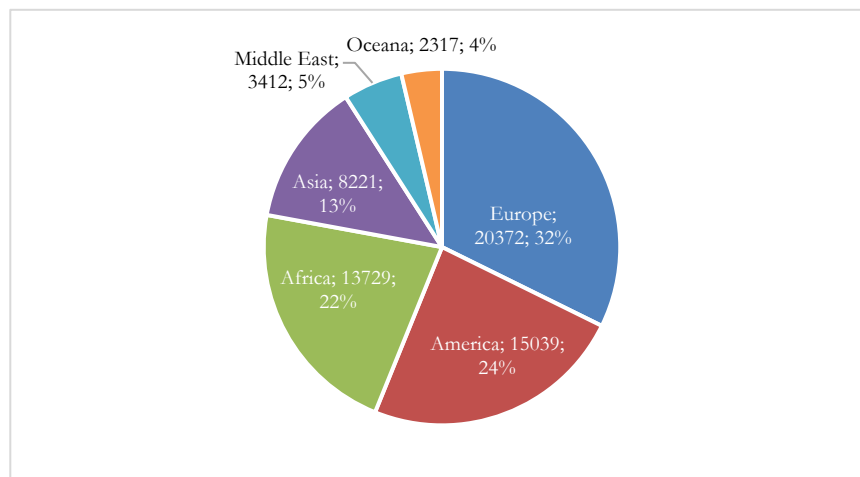
In 2019, the tourist arrival figures split arrivals from Sierra Leoneans in the diaspora and foreign nationals. While total arrivals peaked at 107,630 (up 90%) from the previous year, much of this growth must be attributed to the diaspora returnees. Some 44,540 Sierra Leoneans in the diaspora visited Sierra Leone throughout the year in 2019, most notably in the month of December.

Unfortunately, the official arrival statistics from 2017 onwards are analyzed by world region and not by country of origin. Given these statistical limitations and since the marketing strategy will be targeting mainly foreign discretionary tourists, and especially those visiting for leisure purposes, the rest of this analysis will focus on the characteristic of the 63,090 foreign nationals that visited the country in 2019.

As can be seen from Figure 6, in 2019 arrivals from Europe comprised almost one third of all foreign tourist arrivals, with the Americas (mainly USA) contributing a further 24%. Arrivals from Asia comprised a 13% of visitors. Arrivals from Africa contributed only 22% (13,729) to foreign arrivals, a surprisingly low figure compared to the market composition of most other African countries, where arrivals from regional neighbors comprise a large share of the visitor market.

¹⁴ International Monetary Fund Economic (2019) National Development Plan 2019 – 2023 Click [here](#)

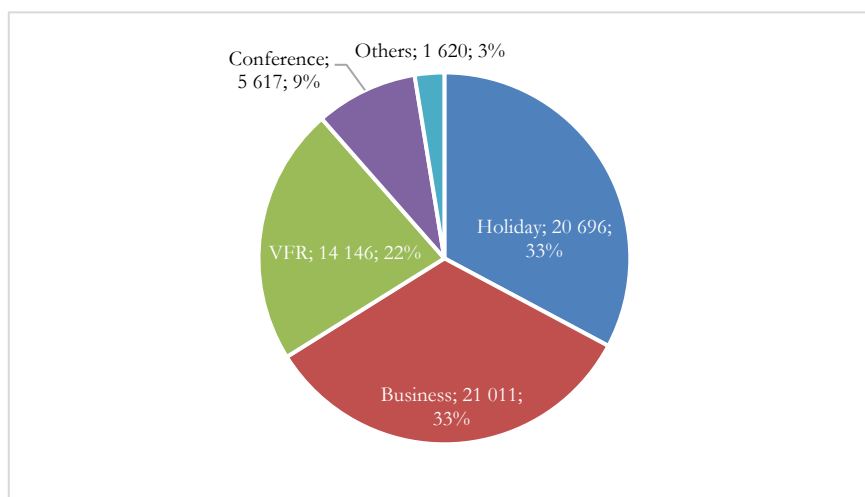
Figure 6: Foreign Arrivals by Region of Residence, 2019



The fact that 62% of foreign arrivals from Africa were nationals from ECOWAS countries implies that Sierra Leone received only approximately 8,500 visitors from West Africa in 2019 compared to the more than 20,000 visitors from Europe and more than 15,000 from the Americas.

Source: NTB, 2021

Figure 7: Foreign Arrivals by Purpose of Visit, 2019

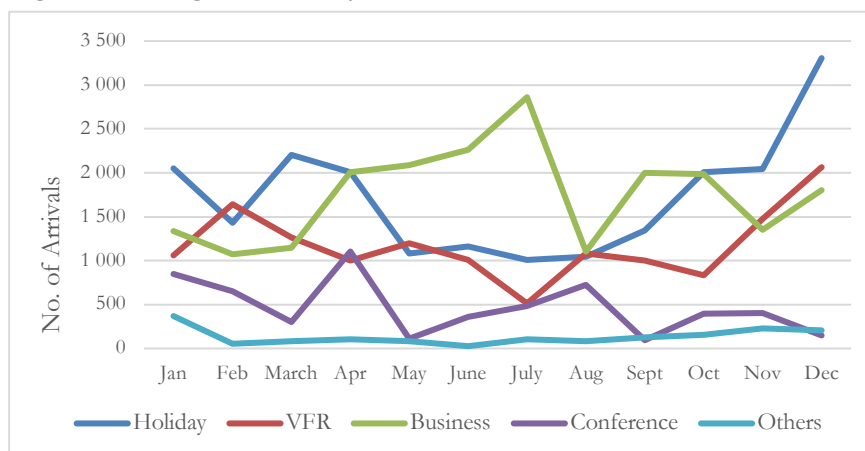


Source: NTB, 2021

20,696 in 2019 and the share of leisure visitors growing well.

From 2015 to 2017, Sierra Leone's tourism industry was largely reliant on business travel and conferencing. The profile changed after 2017 following a concerted focus on growing leisure tourism. Figure 7 indicates a 50/50 balance between business and leisure visitors, with leisure visitor having grown at a rapid rate from 7,728 in 2016 to

Figure 8: Foreign Arrivals by Purpose of Visit and Month, 2019

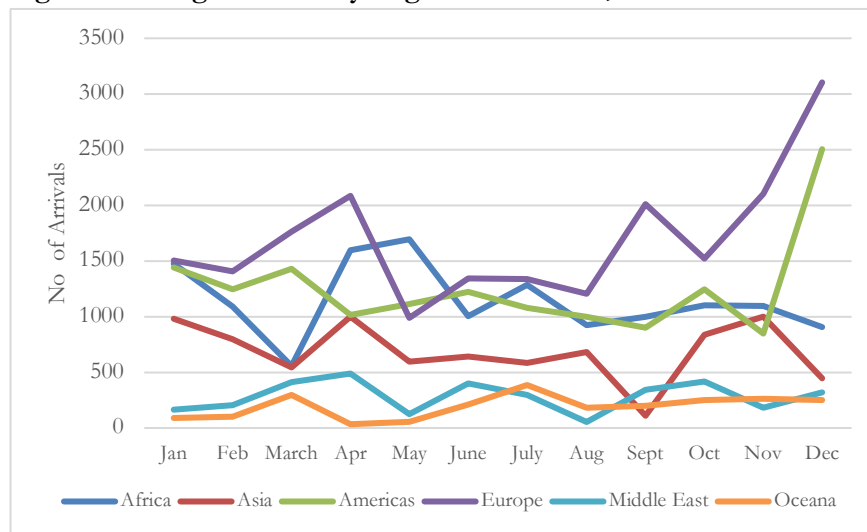


Source: NTB, 2021

Visitors coming to Sierra Leone to connect with friends and relatives, a segment that contributes to the viability of flights to the country, comprise a healthy 22%. Seasonality of arrivals is clearly an important issue to consider in devising the tourism development and marketing strategy.

Figure 8 indicates that the main leisure markets of Europe and the Americas are particularly seasonal, with 66% of visitors from Europe arriving during the period October through to April 2019.

Figure 9: Foreign Arrivals by Region and Month, 2019



Seasonal imbalances in arrivals are particularly notable among leisure (holiday) visitors, with almost 78% of leisure visitors arriving during the period October through to April. Here again, the business market makes an important contribution to retaining a viable tourism industry during the rainy season (May to

September), with business arrivals almost equally split between the seven months of October to April and the five lower season months of May to September.

2.4.3 Market and product segments

While no official data is available regarding the demographic and behavioural nature of visitors, past studies provide an indication of segments with growth potential. The greatest potential markets for Sierra Leone, according to the Tourism Strategic Action Plan by PAI¹⁵ (2008), were African Americans, European sun, sea and sand, and eco-tourism. It says links with the Trans-Atlantic Slave Trade and descendant populations provide the most obvious opportunities, while historic links with Britain, France and other colonial powers were also important. Furthermore, it states that naturalists and sports fishermen represent significant potential markets, however that it is the generalist adventure tourist that would likely be Sierra Leone's principal target.

While the potential for beach tourism for Sierra Leone is frequently touted because of its long Atlantic coastline, the Tourism Strategic Action Plan by PAI (2009) suggests focussing on "niche markets" e.g. eco, cultural- and heritage tourism, where Sierra Leone has the potential to develop a unique profile.

A competitiveness assessment study by the World Bank (2009)¹⁶ appears to agree, saying that given the geographic challenges and market isolation, Sierra Leone may benefit more by focusing on a select few niches within the market, which would bring high-value tourists in smaller numbers, thus putting little pressure on its inadequate infrastructure and posing less threat to its fragile environment.

While many of the findings of the above studies remain relevant, much has changed in the political, economic, social and technological realm of Sierra Leone since. Of course, with the advent of the global COVID pandemic, the nature of tourist arrivals could change significantly. Irrespective of market changes, the following segments deserve particular focus.

¹⁵ PAI (2009) Sierra Leone Tourism Strategic Action Plan Click [here](#)

¹⁶ World Bank (2009) Competitiveness Assessment of Tourism in Sierra Leone Click [here](#)

Beach Tourism

Sierra Leone's Western Peninsula and islands provide the ideal tourism experience for leisure tourists seeking an uncrowded beach resort experience. With only five to six hours flight time from Europe (direct flights) and a comfortable, tropical dry season over the European winter, Sierra Leone offers a relatively pristine yet rustic beach experience for European source markets like France and Scandinavia¹⁷.

Comparing Sierra Leone with The Gambia, a regional rival that has become a popular European destination for mass tourism, the World Bank Competitiveness Assessment of Tourism in Sierra Leone¹⁸ (2009) concludes that Sierra Leone has the advantage of being "relatively pristine and less crowded".

The Tourism Strategic Action Plan (2009)¹⁹ highlights that packaged and all-inclusive beach tourism is a highly competitive and price-sensitive sector. With the explosion of resorts in places like the Dalmatian Coast, Turkey and the Black Sea, which are closer to source markets, as well as countries in the region like The Gambia, Senegal and Ghana, Sierra Leone would face a great competition in this space, without having the resort complexes and charter flights that already exist in these areas. It should further be noted that The Gambia is experiencing various sustainability challenges because of its mass-tourism beach approach.

Nature-based Tourism

According to the World Bank Competitiveness Assessment of Tourism²⁰ (2009), Sierra Leone holds great potential for nature-based tourism, as well as rainforest hiking, fishing, wildlife and bird watching. The assessment asserts, with the right institutional capacity and knowhow, it may also be feasible to develop ecotourism initiatives, especially in areas such as Outamba-Kilimi National Park, Lake Sonfon, Mount Bintumani, Bunce, Island, Gola, Tiwai Island (biodiversity conservation area), Outamba Kilimi (rivers, wildlife and savannah) and Tacugama (Chimpanzee sanctuary).

Bird Watching

Birders are a sub-set of nature-based tourism that holds potential for Sierra Leone. The Tourism Strategic Action Plan (2009)²¹ highlights that there is a potentially "strong product" which would be attractive to the interests of birdwatchers and academic researchers, as is evidenced through the small interest that specialist tour operators like Rockjumper and Rainbow Tours have shown. Visitor facilities are primitive but sufficient to cater for small special-interest groups.

Business Travel

Before Sierra Leone's successful efforts to promote the destination to the diaspora, the main purpose of travel for visitors to Sierra Leone remained business travel. Sierra Leone has a high population of NGOs and development organisations. Included in the business travel category are travelers who attend conferencing. The country's tourism statistics from 2015 to 2018 indicated healthy growth amongst conference travelers as the destination positioned itself as a business conference destination for organisations based in neighbouring countries, such as Nigeria, Ghana and Liberia.

Expat Community

Sierra Leone enjoys a relatively large community of expats – donor agencies, diplomatic corps, voluntary sector and business community – who reside in the Freetown area, which could be a captive market for

¹⁷ Ibid.

¹⁸ Ibid.

¹⁹ PAI (2009) Sierra Leone Tourism Strategic Action Plan Click [here](#)

²⁰ World Bank (2009) Competitiveness Assessment of Tourism in Sierra Leone Click [here](#)

²¹ Ibid.

short breaks. According to the Tourism Strategic Action Plan (2009)²², there is a “clear desire to visit different parts of the country”. It recommends packaging “short breaks to specific attractions” and making these “more accessible and attractive”.

Diaspora Travel

Many African Americans are descended from Sierra Leone and their cultural heritage is still evident in the South-Eastern USA through the continuing use of Krio and some residual Mende language and dance²³. While Sierra Leone’s historic image of “the land of the free” was negatively impacted during the civil war²⁴, historic assets such as Bunce Island, Banana Island and Plantain Island (with remnants of former slave forts and barracoons), still exist. There is potential for historic experiences such as African American heritage trails (including freedom-related sites such as Connaught hospital – site for freed slaves’ first free steps, Cotton Tree, etc) and Graham Greene walking trails (focusing on the colonial history).

Colonial History

The Tourism Strategic Action Plan (2009)²⁵ also highlights the potential for travelers interested in history of colonisation and of liberty. Much remains of the colonial period in the layout of Freetown, including the names of streets and villages in the Peninsula and the architecture of both the central city and Hill Station. Further potential exists in the Graham Greene literary connection. The City Hotel building where he wrote “Heart of the Matter” still exists as do other buildings mentioned in the novel. These could provide a foundation for a complementary tourism product, particularly for UK visitors.

Domestic Tourism

Domestic tourism in the form of short breaks is an opportunity for Sierra Leone as it could play a role in jumpstarting tourism facilities in areas beyond Freetown. One such example, cited by the Tourism Strategic Action Plan (2009)²⁶, is the proposed development of the Bumbuna Lake as a water sports centre with nature/eco-tourist activity readily accessible from Freetown and Makeni. As with the expat market, however, there is a need for easily accessible packages which include transport, accommodation and guided activities.

Scientific, Academic Volunteer and Educational (SAVE) Tourism

The international importance of certain areas of the country such as Tiwai Island, Gola and Outamba Kilimi national Parks and other reserve areas already attracts researchers and students. The Tourism Strategic Action Plan (2009)²⁷ advocates a targeted campaign aimed at academic institutions for student and postgraduate research projects could generate levels of business at a level economically significant to local communities. Sierra Leone also provides an easy and welcoming entry to Africa for volunteers from developed countries who wish to contribute their time in making a difference in the educational, health and other sectors.

²² Ibid.

²³ PAI (2009) Sierra Leone Tourism Strategic Action Plan Click [here](#)

²⁴ World Bank (2009) Competitiveness Assessment of Tourism in Sierra Leone Click [here](#)

²⁵ Ibid.

²⁶ Ibid.

²⁷ Ibid.

2.5 Market perceptions

As precursor to this report surveys were undertaken to gauge perceptions from two perspectives, namely²⁸:

- Tour operators that sell trips to Sierra Leone and/or West Africa in key international markets such as the UK, USA and others. In-depth phone interviews were conducted with a panel of 27 tour operators in Sierra Leone's main source markets, including USA (6), Canada (2), UK (7), Germany (4) and the EU markets of France (2), Italy (2), Belgium (1), Denmark (1), Netherlands (1) and Australia (1).
- Influencers (bloggers) with a large international following and with a history of exposure to developing destinations. An online survey was conducted among 71 travel influencers from 24 different countries.

2.5.1 International tour operators

The results of in-depth interviews conducted with 31 leading international tour operators with programs in West Africa provided the following insights²⁹.

Tour operator characteristics and offering

- Most operators specialize in selling small group tours and tailor-made holidays of 7 to 14 days
- Sierra Leone featured as the sixth most frequently sold destination in West Africa, after Ghana and Senegal, Benin, Togo and the Gambia. It was most often sold as a stand-alone destination or combined as part of a tour to its neighboring countries of Liberia and/or Guinea

Sierra Leone's competitiveness

- Ghana is considered the destination that offers the greatest competition for Sierra Leone. Its tourism infrastructure is well organized and to effectively present West African culture, family heritage and slave trade history
- Tour operators suggested that Sierra Leone could learn how to develop its personal heritage and 'roots' market from both Ghana and Senegal and learn about reputational management from Rwanda
- In terms of beach destinations, the Gambia was a competitor but there was concern amongst tour operators that Sierra Leone should not follow the Gambia's route to mass tourism
- Côte d'Ivoire was suggested as an example of how to present culture and to develop its beaches
- Although costs in Sierra Leone were generally considered to be in a similar price bracket to other West African countries, more than a third of tour operators thought it was an expensive destination

Client profile and expectations

- Consumers who buy tours to West Africa from adventure operators are mostly over 50 years old and travel as a couple or by themselves. There is not a significant family market. However, there is also thought to be growing potential amongst younger age groups who are interested in West Africa, particularly from Afro-Americans aged from around 40 years of age

²⁸ The Journey Tourism and Acorn Tourism Consulting (2021) Sierra Leone Tourism Marketing Strategy and Rebranding, Draft Situation Analysis

²⁹ See Report 1: Situation Analysis for detailed results of the tour operator survey

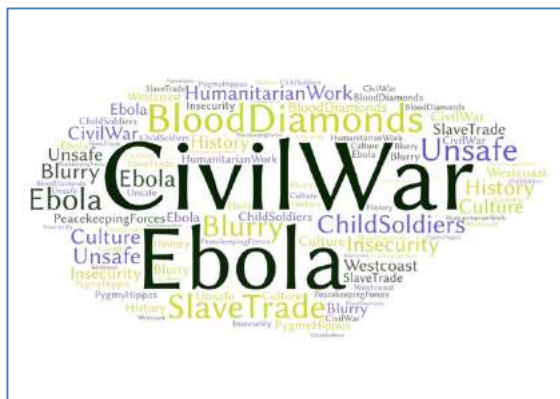
- These tourists are mostly spending mid-market budgets, another third have higher-end budgets. They are very well travelled and are prepared to pay more to travel in small groups
- Personal safety is a priority for all markets and is especially important for North American tourists who need their trips to be well organized from start to finish. The quality of accommodation can be simple, luxury is not expected, but cleanliness is a priority and clients need to feel they are getting value for money at all price points
- Responsible tourism practices and sustainability, with their money benefiting local communities are increasingly important for tour operating companies who sell Africa

Tour operator perceptions

- For those tour operators that have not been to Sierra Leone, its image is based on awareness of the civil war, Ebola and blood diamonds. Concerns over personal security and health safety are foremost. However, for those who have been to Sierra Leone, the impression is completely different. The country's image is focused on the beaches, culture, the chimpanzees and the country's wild nature

Figure 10 (a) and (b): Perceptions of tour operators

- Have not been to Sierra Leone
- (b) Have been to Sierra Leone



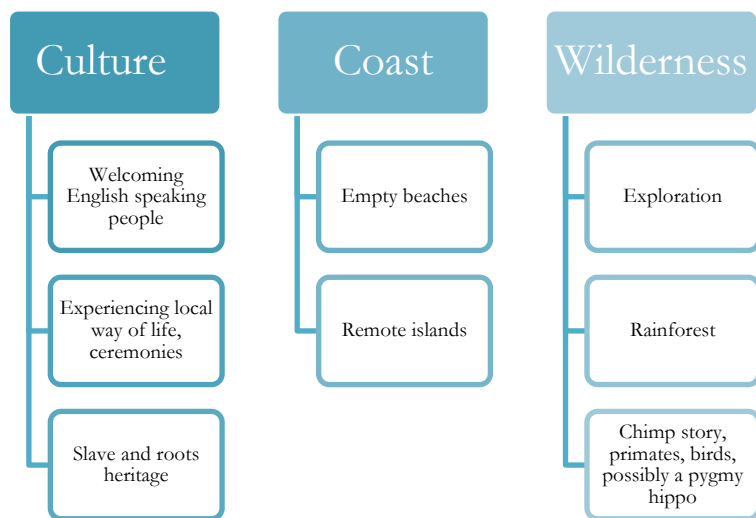
- This stark difference in perception highlights the need to bring trade partners to Sierra Leone and to generate traditional PR and digital influencer coverage to create positive awareness of the country

Motivations, preferences and tourism strengths

- For the trade, Sierra Leone's strengths as a tourist destination vary for different geographic markets. For the EU markets the empty beaches are a priority, for the UK Sierra Leone's English history was important and the English language was valued in the UK, North American and non-French speaking markets. For the North American market, the local way of life combined with Sierra Leone's slave heritage and potential 'roots' market were its key strengths
- The unexpected highlights for tourists were the local community experience, with the traditional way of life, combined with the unspoilt beaches
- The things that tourists least liked about Sierra Leone is the poor quality and over-priced accommodation. The wildlife was also considered to be a disappointment as it is difficult to see and there is little if any infrastructure to support wildlife viewing opportunities

Unique selling points

Figure 11: Sierra Leone selling features highlighted by tour operators



- Sierra Leone is not associated with one unique attribute but is seen as offering a combination of experiences that incorporate its culture, coast and wilderness, as described in the chart below

Current branding

- Tour operators did not feel that the tagline “Sierraously Surprising” helps to sell the country as a stand-alone statement. It also needs to show what IS surprising.
- A key point made is that the tagline is a pun that may not work when applied in languages other than English

Barriers to increasing sales

The key barriers that tour operators face in increasing their sales to Sierra Leone are:

- The low level of consumer awareness about Sierra Leone and the lack of clear branding and consistent marketing that highlights what is special about the country
- The lack of a single outstanding asset makes it difficult to highlight the Sierra Leone's key attributes
- Not knowing a good local partner who understands the needs of their clients
- The poor quality and value of accommodation and unreliable booking process
- Poor infrastructure, particularly the airport and poor quality of roads
- Limited adventure tourism products
- No established routes or itineraries
- The cost of running tours, with overpricing of accommodation, water taxis, car rental
- The country's poor reputation and safety concerns
- Lack of direct international flights.

Figure 12: Tour operators views of whether Sierra Leone has significant tourism potential



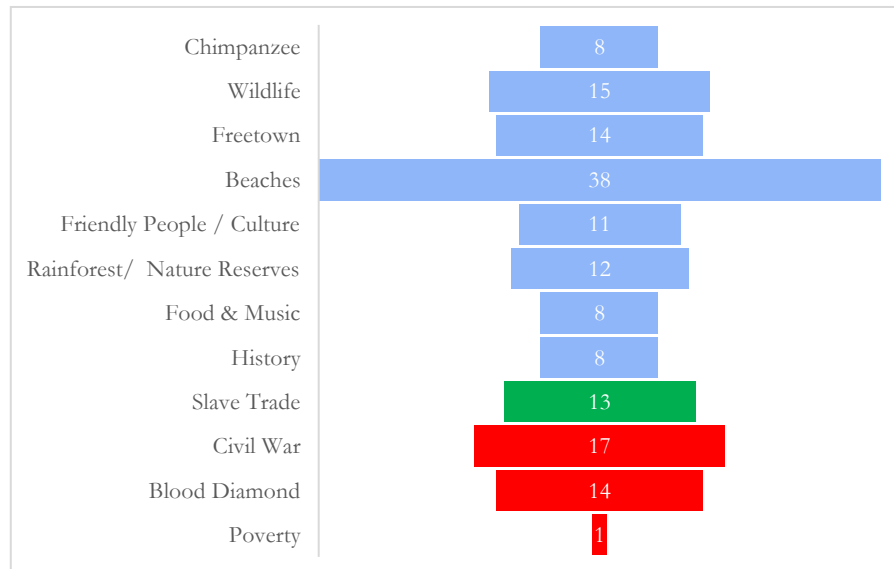
There is growing demand for tours to less visited countries and increased interest in West Africa both across Europe and in North America. If the Sierra Leone's attributes are effectively marketed and suitable products developed, the travel trade considers Sierra Leone to have great potential.

2.5.2 International influencers

Of the 71 influencer respondents from 24 different countries, only 6% have visited West Africa and only 1 had visited Sierra Leone.

Figure 13: Influencers' associations with Sierra Leone

- 78% of the associations with the country was positive with 21% of the association being negative (civil war, blood diamond, poverty)
- Beaches followed by Wildlife and Nature Reserves had the strongest association with the country
- There was an overwhelmingly strong association of slavery to Sierra Leone from American respondents with 93% of the respondents from USA mentioning slavery. Slavery wasn't viewed as a negative association with the country, but rather historical
- More than 60% of the respondents didn't know whether Sierra Leone was safe. Respondents felt that lack information was a reason why they had not previously considered visiting the country. For people who felt unsafe, the main reason were related to civil unrest and Ebola followed by petty crime and chaotic traffic
- The main reasons for wanting to visit Sierra Leone were
 - Nature & Wildlife
 - Beaches
 - Food & Culture [Music]
- There was a also a strong interest in 'Meeting locals' and 'Volunteering'.
- American respondents were keenly interested in understanding the history of slavery and exploring locations/monuments linked to slavery.



2.6 Positioning and branding

The following insights provide a perspective on Sierra Leone's potential market and brand positioning.

2.6.1 Positioning advantages and disadvantages

While Sierra Leone has a competitive advantage in terms of its natural assets, the lack of tourism development and public infrastructure, poor connectivity, limited skilled manpower and community awareness of tourism and poor destination reputation hamper the extent to which the country can leverage these.

A comparative assessment conducted as precursor to this document in 2021³⁰ of visa, airfare and accommodation costs in Sierra Leone and selective competitors (The Gambia, Ghana, Rwanda, Guyana and Tanzania), confirms the findings of the World Bank³¹ that Sierra Leone is relatively high-cost destination. In terms of visa openness Sierra Leone has made excellent strides and has moved close to the top 20 most visa-open countries on the Visa Openness Index in 2020³².

A comparison of Sierra Leone with potential competitors in Africa, is provided in Table 2 below³³, confirms that Sierra Leone's competitive advantage lies primarily in its coastal and marine resources, combined with its eco-tourism assets.

Table 2: Competitive tourism assessment, Sierra Leone vs selected competitors in Africa

Regional competitors and their Selling Propositions		Ghana	Gambia	Tanzania	Uganda	Rwanda
		Easy Africa	Relaxation and Enjoyment	Classic safari, beach	Eco /Adventure	Eco/ safaris Gorilla
Color Key	Sierra Leone is more attractive	Sierra Leone is equally attracted			Sierra Leone is less attractive	
Tourism resources						
Unique sites/Iconic experiences						
Wildlife and safari						
Cultural uniqueness/people						
Historical sites and relics						
Scenic beauty and natural features						
Forests and tropical life						
Coastal and marine environment						
Tourism support services						
People hospitality, peacefulness						
Hospitality and tourism amenities (accommodation, catering, activities)						
Land transport						
Air access						
Demand Conditions						
Proximity of major markets						
Value for money						
Ease of access and purchase						
Image of health, safety						
Industry capacity						
Tourism Human resources						
Tourism entrepreneurship/innovation						
Tourism institutions and funding						

³⁰ The Journey Tourism and Acorn Tourism Consulting (2021) Sierra Leone Tourism Marketing Strategy and Rebranding, Draft Situation Analysis

³¹ World Bank (2009) Competitiveness Assessment of Tourism in Sierra Leone Click [here](#)

³² Visa Openness (2020) Visa Openness Index Click [here](#)

³³ Assessment based on available information obtained from websites and electronic publications and articles

Sierra Leone has an opportunity to learn from the challenges facing The Gambia and focus its strategy on higher-value, low-volume source markets and market segments. Rwanda and Guyana have adopted such a strategy in order not to put unnecessary pressure on the existing limited infrastructure, and to ensure that the benefits of tourism are felt across the local economy. A higher value-lower volume strategy is also suitable for ensuring visitor health and safety, especially in the wake of COVID-19.

2.6.2 Brand insights

The risk of marketing without the focus afforded by a brand strategy is that the destination brand may be inadvertently damaged instead of built. An example of this is that for many years, the country's visual identity was tied to diamonds despite their link to the bloody conflict in Sierra Leone at the end of the previous century.

A brand promise positions a brand, and it is arrived at by a process of distillation through self/consultant analysis, stakeholder analysis and competitive analysis. Key inputs to the Sierra Leone destination brand promise that have emerged from the situation analysis could be summarized as follows:

Table 3: Summary of brand promise insights

Self-analysis	Stakeholder analysis	Competitive analysis
<ul style="list-style-type: none"> Freedom as captured in the name Freetown, supported by history, and a free-and-easy attitude to life. The relaxation of the beach and the refreshment of the sea. The freedom to explore starting in Freetown, reached by sea, and spiraling out to beach, forest, mountains, wildlife. Welcomed and guided by a people who know the value of being free. 	<ul style="list-style-type: none"> The main attraction is the sea and the coast with the combination of relaxation, refreshment and adventure that brings. Extending to a lifestyle, free, easy, warm and hospitable, but also joyous, vibrant and alive, flavored and colorful and living in the moment. Re-energized to get out there and explore, to learn new things, and be more. 	<ul style="list-style-type: none"> Not only what you find, but what you leave with. Not only about things, wonderful and beautiful as they are, but about beings and being. Not only about hospitable people who greet you, but about their wisdom that you take back with you.

2.7 Destination marketing

2.7.1 Marketing policy directives

The Sierra Leone Tourism Policy (2017) highlights the need for a robust marketing campaign employing “extraordinary resources and efforts³⁴” in the post-Ebola period using social media, print and electronic media, and local and international trade shows to develop a favourable destination reputation in international source markets and to position Sierra Leone as a “safe, attractive, hospitable and quality” tourism destination referred to as “the Hidden Paradise”.

A further suggested action in the Tourism Policy (2017) is for a tourism awareness and sensitization campaign amongst consumers, businesses, investors and government to create awareness about the positive impact of tourism on the national economy, including the job opportunities it generates, the financial returns on investment, the deep value chain which benefits from tourism activities, the protection of the environment, the preservation of culture and national cohesion and pride.

³⁴ Sierra Leone Government (2017) Sierra Leone Tourism Policy Click [here](#)

In addition, the Tourism Policy suggests:

- A focus on encouraging the public and private sector to jointly fund marketing activities
- Collaboration with Sierra Leone Import and Export Promotion Agency (SLIEPA) and Sierra Leone Foreign Missions to promote tourism abroad
- The use of modern information and communication technology to market tourism products
- Participation in regional initiatives to jointly market common tourism products
- Monitoring and evaluation of the effectiveness of promotional expenditures

2.7.2 Organisational capacity

Marketing of Sierra Leone is the mandate of the National Tourism Board (NTB). The NTB was set up as a semi-autonomous body through the enactment of the Tourism Development Act 1990. The aim of the Act is to promote and develop all aspects of tourism in Sierra Leone.

The NTB's mission is to develop and promote quality tourism through the implementation of Government's policies and to encourage the active participation of the private sector with a view to enhance socio-economic development and poverty reduction.³⁵ The NTB is therefore charged with a wide range of responsibilities, including tourism planning and development, investment promotion, maintaining tourism standards, human resources development and destination marketing and branding. The affairs of the organisation are directed by a Board of Directors consisting of nine public and private sector appointees.

NTB's staff establishment provides for 47 posts, excluding staff deployed specifically to maintain and improve the key beaches. Nineteen (19) positions on the core staff establishment are vacant. Of concern is the fact that 10 of these vacant posts are for Tourism Officer and Assistant Officer positions, i.e. technical, qualified staff responsible for driving the execution of tourism development and promotion projects.

The Marketing and Public Relations department currently has a limited staff compliment consisting of the Manager, a Marketing Officer, a Marketing and Publicity Administrative Assistant and 3 Tourist Information Assistants based at the Lumley Beach and Lungi Airport tourist information offices.

Four key operational marketing positions i.e. those of the Communication and PR Officer, Research and Technical Officer, Marketing Assistant Officer and Research and Technical Assistant are vacant.

Regarding marketing finances, NTB has been operating with a marketing budget in the order of US\$500,000 per annum during the period 2017 to 2019. This means that approximately 45% of the total operational expenses have been used for domestic and international marketing activities. While the marketing budget is small in real terms compared to that of Rwanda³⁶, it is similar to that of Ghana³⁷. By all accounts, the tourism marketing budget of the Gambia³⁸ is smaller than that of Sierra Leone. Importantly, the marketing budget per visitor attracted is substantially higher for Sierra Leone compared to these competitors.

³⁵ NTB, 2017. NTB Budget presentation 2018 - 2020

³⁶ <https://www.tourismupdate.co.za/article/rwandas-eu3.3m-tourism-marketing-budget>

³⁷ <https://www.mofep.gov.gh/sites/default/files/pbb-estimates/2019/2019-PBB-MOTAC.pdf>

³⁸ <https://www.mofea.gm/downloads-file/approved-budget-2021>

2.7.3 Marketing activities

The Situation Analysis report³⁹ that preceded this strategy presents a detailed account of marketing activities undertaken by NTB in 2019 and 2020, prior to COVID-19.

Marketing activities and expenditure during the past three years focused mainly on below-the-line, B2B destination awareness. Marketing activities planned for 2020 included:

- International marketing
 - Attending international fairs such as ITB (Germany), Fitur (Spain), Top Resa (France), WTM (UK), Matka (Finland), West African Travel Market
 - Printing of tourism collateral, including brochures, maps, etc.
 - Development and maintenance of a Sierra Leone website
 - Managing social Media Handles: Facebook, Twitter, YouTube, Instagram and LinkedIn
 - Organising familiarisation trips for trade and media
 - Media interviews with international networks
 - Collation of information and statistics for responses to enquiries
 - Appointing PR / Representations agencies in key markets to facilitate media and trade relations and support NTB's presence at trade fairs
- Domestic marketing and sensitisation
 - Organising local farm tours
 - Civil society organisation engagement on community sensitization & awareness raising
 - Prints and electronics media programs
 - Hosting regional tourism festival in country in April/December 2020
 - Hosting of tourism experts (tour operators and journalists) on FAM tours in Sierra Leone and Freetown - April and November 2020

2.7.4 Benchmarking with competitors

The Situation Analysis report⁴⁰ provides a detailed assessment of marketing performance, strategies and tactics employed by the five competitor destinations, as well as lessons for Sierra Leone. An analysis of marketing campaigns, business-to-business marketing initiatives, media engagement and digital marketing initiatives of Sierra Leone and the selected competitors revealed the following:

- *From a positioning perspective*, the competitor destinations have carved clear strategic positions (through both market forces and strategic design), ranging from an invitation to discover the new/undiscovered (Guyana), high value nature and safari tourism (Rwanda and Tanzania), cultural and “roots” discovery (Ghana) and affordable beach holidays (The Gambia). While NTB has used “Sierraously Surprising” as a promotional tagline at more recent tourism exhibitions, it will be important for Sierra Leone to develop and grow a market position that clearly sets it apart from competitors
- All the destinations *focus on business-to-business (B2B) marketing* through selective participation in the main travel fairs, contracting of marketing representation on a project basis and hosting of trade

³⁹ The Journey Tourism and Acorn Tourism Consulting (2021) Sierra Leone Tourism Marketing Strategy and Rebranding, Draft Situation Analysis

⁴⁰ Report 1: Situation Analysis

familiarization trips. The more progressive destinations like Rwanda and Guyana also conduct trade roadshows and have developed online travel trade education programs. It should be noted that attendance of trade fairs is increasingly selective with a key focus on major fairs such as ITB and to some extent WTM; and that DMOs attend trade fairs mainly to provide a participation platform for private sector operators. Given NTB's limited resources, a critical review of B2B marketing activities is required to ensure a proactive, targeted and personalized approach in addressing brand awareness and image challenges highlighted above. While selective attendance of travel fairs may render results, especially if it provides an engagement platform for Sierra Leone's private sector, more personalized and measurable trade interventions such as sales missions, road shows, targeted familiarization visits, online trade education, joint marketing agreements and consistent trade communication should be considered

- *Regarding traditional (non-digital) consumer marketing*, established destinations like Tanzania and Rwanda have initiated various promotional initiatives such as the appointment of tourism ambassadors for the diaspora market (Ghana), participation in nature film festivals (Tanzania), blogging and influencer involvement (Guyana), and capitalizing on consumer sentiments (e.g. gorilla naming and Arsenal football sponsorship, Rwanda). The film made of Jane Goodall's visit to Sierra Leone is a good example of capitalizing on such newsworthy events; however any such celebrity marketing tactics should be accompanied by a holistic PR and online (viral) marketing strategy. Destinations have also recently been focusing more on stimulating domestic tourism through awareness creation in the local media. NTB's recently initiated domestic tourism drive is a good step forward in this regard
- Competitors that are focused on attracting adventurous and non-packaged (independent) travelers, are *investing heavily in digital consumer marketing* with the more successful destinations like Ghana, Rwanda and Tanzania achieving high levels of digital and social media reach compared to Sierra Leone. This component of the marketing mix requires substantial improvement and investment, as indicated in the evaluation in the section below

2.7.5 Digital marketing evaluation

Given the changing environment, with consumers and the travel trade relying increasingly on digital marketing and distribution channels, a key focus of the marketing and branding project is on the development and implementation of digital marketing tools and techniques.

The Situation Analysis report⁴¹ presents the results of a detailed digital marketing assessment and benchmarking study, which can be summarised as follows:

- *Website*: While NTB has recognized the importance of a quality website and has started work on improving its site, various aspects require urgent improvement. These include the need to change the website domain name, addressing various technical meta-tagging and other issues, making the website navigation more consumer friendly, redesigning the homepage to showcase the best of Sierra Leone and answering some critical visitor questions (including a 'COVID-19 update'), undertaking significant in-site linking and optimizing the website content for Search Engine Optimization (SEO) by adding inspiring images and videos
- *Content marketing*: improvements could entail adding well researched and written articles about the destination, involving third parties to produce content, help with the information dissemination

⁴¹ Report 1: Situation Analysis

process, generating more ‘positive chatter’ about the destination and boosting positive TripAdvisor reviews

- *Social media marketing:* Currently NTB is active on Instagram, Facebook, Twitter and YouTube. NTBs social media following is significantly lower than any of their other competitors and improving social media performance will require building up its social media following by implementing a cohesive content plan for strategic and tactical activities, producing and posting compelling videos that are widely viewed by all target market segments and engaging and associating with selected influencers and brands on innovative campaigns to help spread the word

2.8 Summary of findings

2.8.1 Destination analysis of Strengths, Weaknesses, Opportunities and Threats (SWOT)

As a basis for developing a marketing strategy, the following assessment of destination Strengths, Weaknesses, Opportunities and Threats provides an indication of the rich tourism resources and growth opportunities, but also highlights the many gaps that still need to be overcome in pursuit of sustainable tourism growth. It shows the need for a phased and responsible tourism growth strategy and the importance of developing and promoting a brand upon which tourism can be built over time.

Strengths	Weaknesses
<ul style="list-style-type: none"> • Diverse natural, cultural and historic assets • 570km of beautiful Atlantic coastline with islands • Pristine, uncrowded beaches • Rich biodiversity – high eco-tourism potential, especially some rainforest areas, birdlife and rare species such as pigmy hippo, chimpanzees and others • Geographic proximity to market • Temperate climate • Slave history – heritage of freedom of slaves and appeal for diaspora • Unique cultural traditions • Friendly local population and a free-flow and spontaneous lifestyle • Visa on arrival and commitment to improving visa openness 	<ul style="list-style-type: none"> • Destination image tainted by negative past events • Limited and expensive air, water and land transport • Lack of connectivity and accessibility to tourist sites • Gaps in basic infrastructure, including sanitation, water, public transport • Limited and inadequate quality of tourist amenities and visitor infrastructure • Inconvenient airport-to-town transfer, which is currently mostly done by boat • Poorly developed local tourism supply chain and high importation of e.g. quality and affordable food fresh produce, hospitality furnishings, maintenance services, etc. • Weak institutional capacity in policy development and planning • Critical hospitality skills capacity shortages • Perceived as an expensive destination, including high airfare - insufficient value for money • Few destination management companies (DMCs) and ground handlers to facilitate travel planning • Limited number of international operators who sell West Africa, and even fewer who sell Sierra Leone. • Visa fees more expensive than some competitor countries • Environmental challenges in terms of air pollution, deforestation, desertification, encroachment in sensitive areas and dwindling wildlife population – threat to natural tourism assets • Lack of a holistic and visionary tourism strategy

Opportunities

- Global interest in a return to Africa by African Americans interested in discovering their roots
- Saturation of neighbouring tourist destinations, e.g. The Gambia
- Renewed focus on experiential travel and off-the-beaten track destinations, with specialist tour operators actively seeking 'new' destinations
- Increasing demand for sustainable, low volume, high-value destination experiences, especially in the wake of the COVID-19 epidemic
- Potential power of a coordinated, brand focused marketing strategy to attract domestic and international leisure tourists
- Further prioritisation of tourism - whole of government approach needed.
- Potential travel value of expats and domestic tourists – in market already.
- Global trend towards homestays and community tourism
- The proposed development of 'honeypot' sites, such as the Tacugama Chimpanzee Sanctuary and beaches
- Digitisation during COVID: Platforms help consumers plan and enjoy travel before, during and after their trip through reviews and their social media networks
- The trend towards more individual and authentic travel experiences in future turning their backs on artificial "travel worlds"

Threats

- COVID restrictions on international travel – resulting in inconsistent and fluid demand
- Afro-pessimism with reduced risk appetite among travelers for 'unknown' destinations
- Reduced airline schedules making accessibility even more of an issue
- Tourism value chain affected by COVID – furloughed staff, company closures
- Potential pressure to increase volumes and to promote Sierra Leone as a mass-market beach destination as a short-term quick win, but with long-term challenges
- Inability to implement a sustainable tourism policy and practices, resulting in haphazard development and negative environmental and cultural impacts
- Impact to disposable incomes as economies retract and consumers focus on essential goods and services
- Rise of COVID variants
- Roll out of vaccination programs in source markets
- Increased competitive activity in the wake of COVID-19

2.9 Key marketing opportunities and challenges

The following are considered the main opportunities and challenges related to the marketing mix (product, price, place/distribution and promotion) that need to be addressed by the destination branding and marketing strategy.

2.9.1 Product development and packaging

The following aspects present product development opportunities and challenges in support of a branding and marketing strategy:

- Following a path of *sustainable tourism* development and avoidance of mass tourism
- *Building on past and current tourism investments* (e.g. SLEDP project developments and other investments)
- Packaging tourism attractions and experiences as *themes and travel routes*
- Developing *special interest products and services* for niche markets such as sport fishing, birding, water sport, hiking, surfing, botanical tourism and others
- Engaging in well-organized and planned *investment promotion* to attract the right type of tourism investment
- Expanding the variety of *tourist-class accommodation*, especially outside of Freetown e.g. by incentivize accommodation improvements and train up hospitality service providers
- Raising *community awareness and understanding* of the opportunities and responsibilities associated with tourism development
- Expanding *visitor amenities* (banking, internet access, etc.)
- Engaging the health and security authorities to ensure adequate *emergency services, visitor security* and other risk-management measures.

2.9.2 Destination pricing

The following aspects present product development opportunities and challenges in support of a destination price perceptions and reality:

- Communicating a *value-for-money proposition* and offsetting perceptions by some tour operators that the destination is “expensive”.
- *Promoting competition in the sector* to increase competitiveness and ensure fair pricing.
- Improving *flight access* from Europe and the USA, e.g. by reducing landing costs, engaging in joint marketing, etc.
- *Improving service levels* in hospitality establishments and tour companies.

2.9.3 Destination promotion, branding and image management

- Launching and promoting a *differentiated positioning and attractive destination brand* to substantiate the single-minded value proposition
- *Countering lingering market perceptions tied to past war and health risks* and building a positive destination image and negating unwarranted negative perceptions

- *Ensuring synergy in promoting a common brand identity* between NTB and its private sector partners, other government agencies and ministries and regional tourism leaders and tourism bodies
- *Capitalizing on the growing promotional power of digital media* by re-gearing their marketing strategies and mixes towards these new media in a targeted and measurable manner
- *Improving digital marketing tools* such as destination website, social media platforms, distribution databases and newsletters, digital visual marketing collateral, digital advertising systems and CRM systems, which are currently not up to standard
- *Promoting domestic tourism awareness and travel* both as a consistent source of tourism demand and to encourage awareness and appreciation of tourism as a vehicle for local economic development is crucial

2.9.4 Travel channel and distribution system development

- Following a *diversified and targeted business-to-business (B2B) marketing approach* that achieves the best possible return on marketing investment and builds lasting trade relations
- *Strengthening the inbound tour operator network* and growing the capacity and size of the inbound travel operators
- *Expand the range of international travel offers* and partnership in key markets

2.9.5 Human resources and institutional development

- Spearheading a *“whole of government” approach in promoting and delivering tourism* in all relevant government departments including safety and security, conservation, environmental management, transport, foreign affairs, immigration, cultural affairs, finance and others
- *Building public-private marketing partnerships* with the local travel trade in promoting destination Sierra Leone
- Ensuring adequate and *consistent promotional funding*
- Strengthening NTB’s *organizational capacity*
- Improving *performance measurement and market intelligence*, including the timeliness and validity of tourism visitor statistics and market research

3 Marketing and branding strategy

The following section sets out the growth vision, objectives and main marketing foundations that underpin the strategy. These are:

- A differentiated market positioning and destination brand
- High-yielding target source markets and segments
- Products and experiences that match market needs

3.1 Growth Vision

By 2030, with the global tourism industry having fully recovered from the COVID-19 pandemic, Sierra Leone will rate among the fastest-growing tourism destinations in Africa and the world. The efforts of the government, working hand in hand with the private sector to develop a higher value brand of sustainable tourism, will have paid off. Tourism will increasingly be valued by all divisions of Government, the business sector and civil society at large. as a leading vehicle for job creation, economic growth, nature and culture preservation and social harmony

3.2 Objectives

In achieving the vision, by 2030:

- The country will receive at least 111,000 visitors p.a.⁴².
- Tourism will sustain in the order of 1,600 direct and 3,200 indirect jobs across the tourism value chain⁴³.
- The industry will directly generate approximately US\$93 million in foreign exchange per annum⁴⁴.
- Accommodation in Class 1 and 2 establishments will increase from the current 1,180 rooms to 2,088 rooms⁴⁵.

3.3 Market positioning

3.3.1 Selling proposition

Sierra Leone is a largely undiscovered, multi-dimensional destination that offers a range of unique experiences, including having and hosting:

- Some of the most attractive and largely undeveloped beaches and coastline in Africa.
- The territory where freed slaves found a new home with key sites and storylines as a reminder of the slave era and Sierra Leone as a symbol of freedom from slavery.
- A tropical climate with consistent, warm temperatures throughout the year.
- Substantial areas of virgin, tropical Afro-Guinean rainforest.

⁴² Based on visitor arrivals having recovered by the end of 2024 to pre-COVID levels of 63,000, and growing at an average 10% p.a. thereafter

⁴³ Based on 1 direct and 2 indirect jobs being created by every 30 additional visitor arrivals

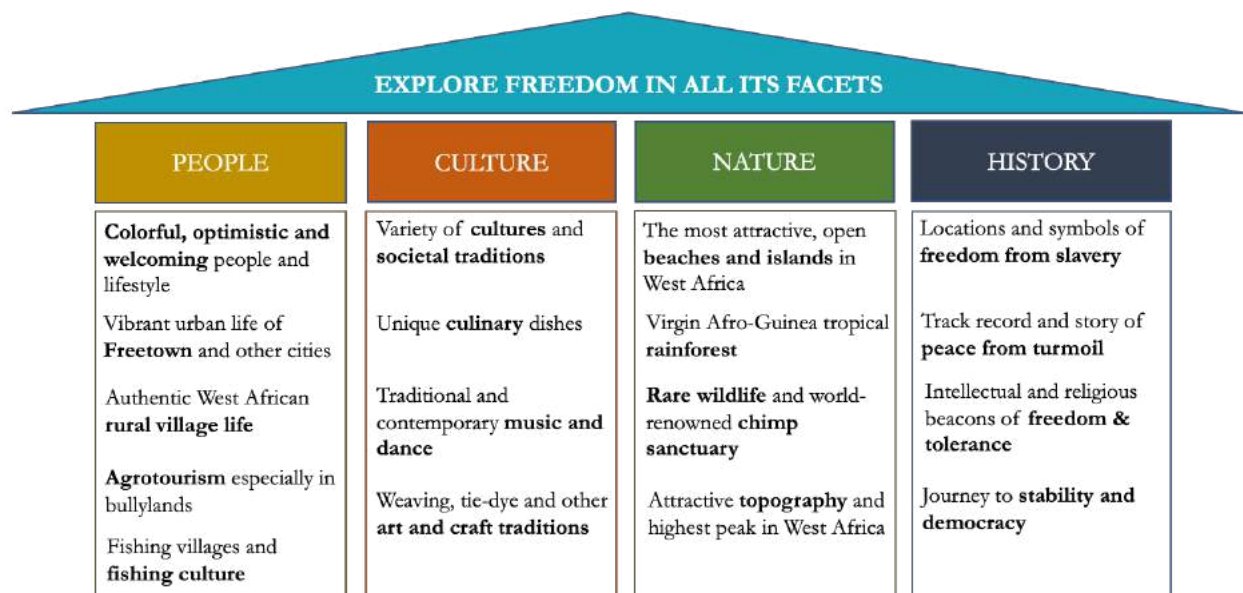
⁴⁴ Calculated as 111,000 arrivals x US\$120 expenditure per day and staying 7 days on average

⁴⁵ Room numbers supplied by NTB

- A very attractive undulating landscape and being home to the highest mountain peak in West Africa, Mt. Bintumani.
- A biosphere for unique West African wildlife, fish and bird species.
- A multi-cultural population with a variety of interesting cultural traditions.
- Most important, a warmly welcoming people, upbeat spirit and a “love of life” lifestyle that shines through in the everyday life and the way visitors are welcomed in the country, despite Sierra Leoneans having faced some trying circumstances and events over the past decades.

As demonstrated in Figure 14 below, visitors are able to explore the true meaning of “Freedom” in all its facets in Sierra Leone, as manifested so boldly in the history, nature, cultural heritage, history and lifestyle of the people and the country.

Figure 14: Pillars of Sierra Leone’s Differentiated Market Positioning



3.3.2 Positioning implications

Some key implications of this positioning for the marketing strategy are:

- *Promote Unique Selling Points:* Sierra Leone has a lot more to offer than what is generally recognized. The marketing strategy should focus on communicating Unique Selling Points related to the positioning pillars, namely:

Natural experiences, with emphasis on:

- The superb beaches and islands of the Sierra Leone coastline.
- Outdoor active opportunities such as surfing, sport fishing and other marine sports.
- The Upper-Guinea rainforest – its biodiversity, characteristics, mystique and solitude.
- Unique wildlife species – especially the chimpanzees, other primates in the wild, the pigmy hippo and the touching heritage of the Tacugama chimp sanctuary.
- Exceptional birdlife – threatened species like the White-throated Bee-eater (national bird) and near endemic species of malimbos, hornbills, cuckoos, parrots, owls, trogons, honeyguides, woodpeckers, warblers, orioles, bush-shrikes, guineafowl, francolins and others.

Cultural experiences with emphasis on:

- The melting pot of indigenous cultures and social traditions.
- The European influences due to the country's history.
- Unique dishes such as cassava leaf and potato leaf stews, gari, superb seafood and others
- Local traditional and contemporary music and associated instruments.
- Special handicraft traditions such as palm-leaf weaving (with iconic the shuku-blai vessel, gara cloth and others).

People and local lifestyle experiences, with emphasis on:

- General upbeat spirit, «love of life», welcoming of visitors, resilience and an attitude living positively irrespective of challenges.
- The vibrancy of Freetown and other cities.
- Rural village life, traditions and living in harmony with nature.
- Agricultural practices, especially tilling and planting methods.
- Fishing communities and fisherman culture.

History, with emphasis on:

- The slavery history and freedom of slaves and the various landmarks in this regard.
 - The process towards peace and stability following times of turmoil.
 - The amazing tolerance of various belief systems and religions living in harmony.
- *Target the adventurous traveler:* Sierra Leone appeals to those who want more out of a trip than only “looking”; those who prefer to touch, taste and engage with the environment, the people and their traditions. A focused marketing strategy that targets such travel segments, based on good market knowledge and intelligence, is an important requirement for achieving rapid and sustainable tourism growth.
 - *Create a suitable environment for experiential travel:* In its current development stage Sierra Leone is primarily an activity-oriented travel destination, rather than a holiday destination for relaxation. This has implications across the entire tourism value chain, especially regarding the provision of visitor facilities, safety and infrastructure, opportunities for interacting with nature and culture, conserving natural and cultural resources, community involvement and participation, etc. These aspects need to be addressed holistically through implementation of an integrated tourism Master Plan.
 - *Ensure safety and well-being of visitors:* The invitation to adventure seekers to explore Freedom in all its facets is accompanied by an element of risk and given lingering negative perceptions in the market, the industry cannot afford to compromise visitor health and safety. Concerted efforts should be made to provide adequate safety, health and emergency services to visitors.
 - *Develop and package experiences and not only attractions:* The various attractions in Sierra Leone are spread across the country and accessibility, availability and quality of visitor services vary considerably among attractions and destinations. Presenting such attractions to visitors as opportunities for engaging with nature and culture, requires a dynamic public-private-community partnership. This should include local communities providing access to their areas and partnering with private investors in providing commercial services and facilities, private tour operators linking experiences and attractions as itineraries that can be sold to visitors, technology being used as tools for enticing and guiding visitors and public tourism bodies promoting travel destinations and routes, providing public visitor services and improving sites.

3.4 Brand Sierra Leone

NOTE: The brand strategy is laid out in detail in *Appendix 2* and the brand identity, visual application and tone of voice are further illustrated in a separate *Sierra Leone Tourism Brand Manual*.

3.4.1 Introduction

The full draft brand strategy attached as *Appendix 2* includes:

- Methodology used.
- Input to this draft brand strategy.
- Detail substantiating the summary contained here.

The purpose of a brand strategy is to describe a brand in terms of this definition:

*A brand is a **badge** of origin, a **promise** of performance and a means of **differentiation** used in pursuit of a defined **purpose**.*

3.4.2 Brand vision

Brand vision is how to position the Sierra Leone destination brand, and this is done by **making a promise** that is arrived at through a process of distillation:

Figure 15: Brand development process

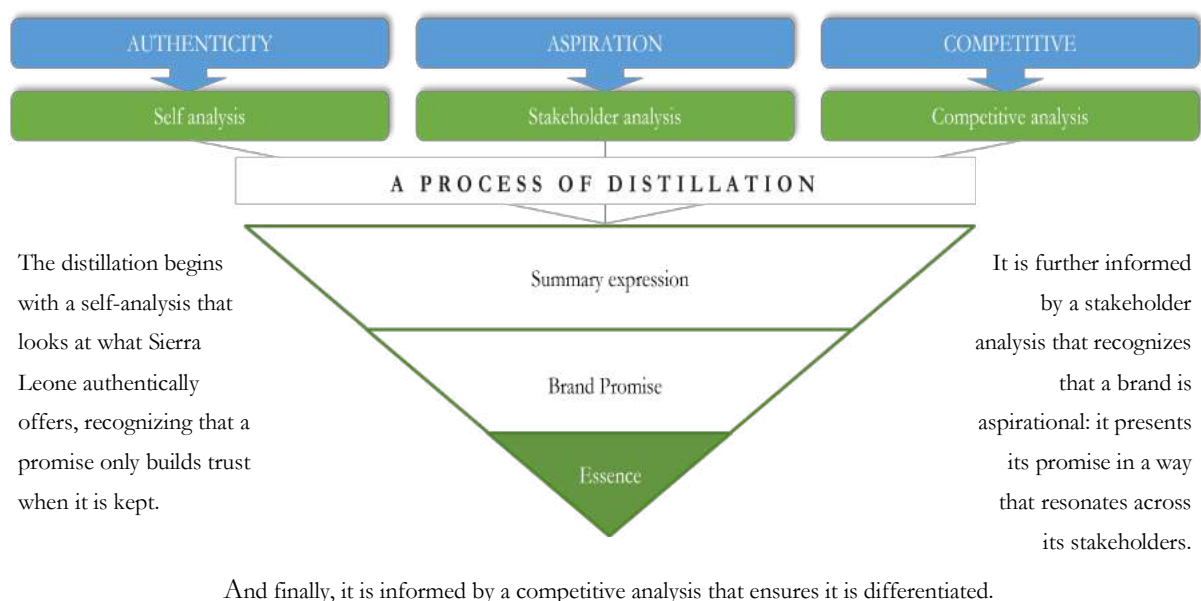
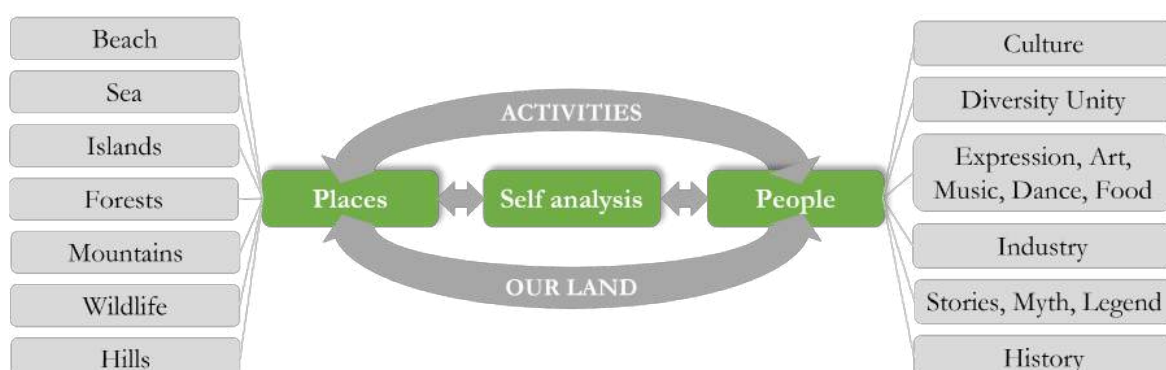


Figure 16: Sierra Leone brand attributes

Sierra Leone can authentically claim to have a great deal to offer the world of tourism:



With so much to attract people to Sierra Leone there is a need to focus on what it is that will attract them most: what do they aspire to.

Travel influencers mention the following:

Beaches: 38 mentions.

Wildlife (15) / Forests & Reserves (12) / Chimps (8): 35 mentions.

Freetown (14) / People & Culture (11) / Food & Music (8): 33 mentions.

History (8) / Slave Trade (13): 21 mentions.

Influencers who have experience of Sierra Leone recognize both the natural attractions and the cultural attractions but there is a marked swing towards a preference for people over place and this is endorsed by **tour operators**.



In terms of West Africa culture is attractive to them and for Sierra Leone history is especially appealing.





This emphasis on people is also the preference expressed by Leoneans themselves and is well enunciated by the Honourable Minister of Tourism and Culture, Dr Memunatu Pratt:

“That woman working the land, that young boy selling fruit on the beach, that man on his akada in Kabala, the musician, the dancer, the town crier, the weaver, it’s a whole song and it needs to be communicated.

“At the end of the day it is about people.”

Based on self-analysis and stakeholder analysis two positioning statements were attractive:

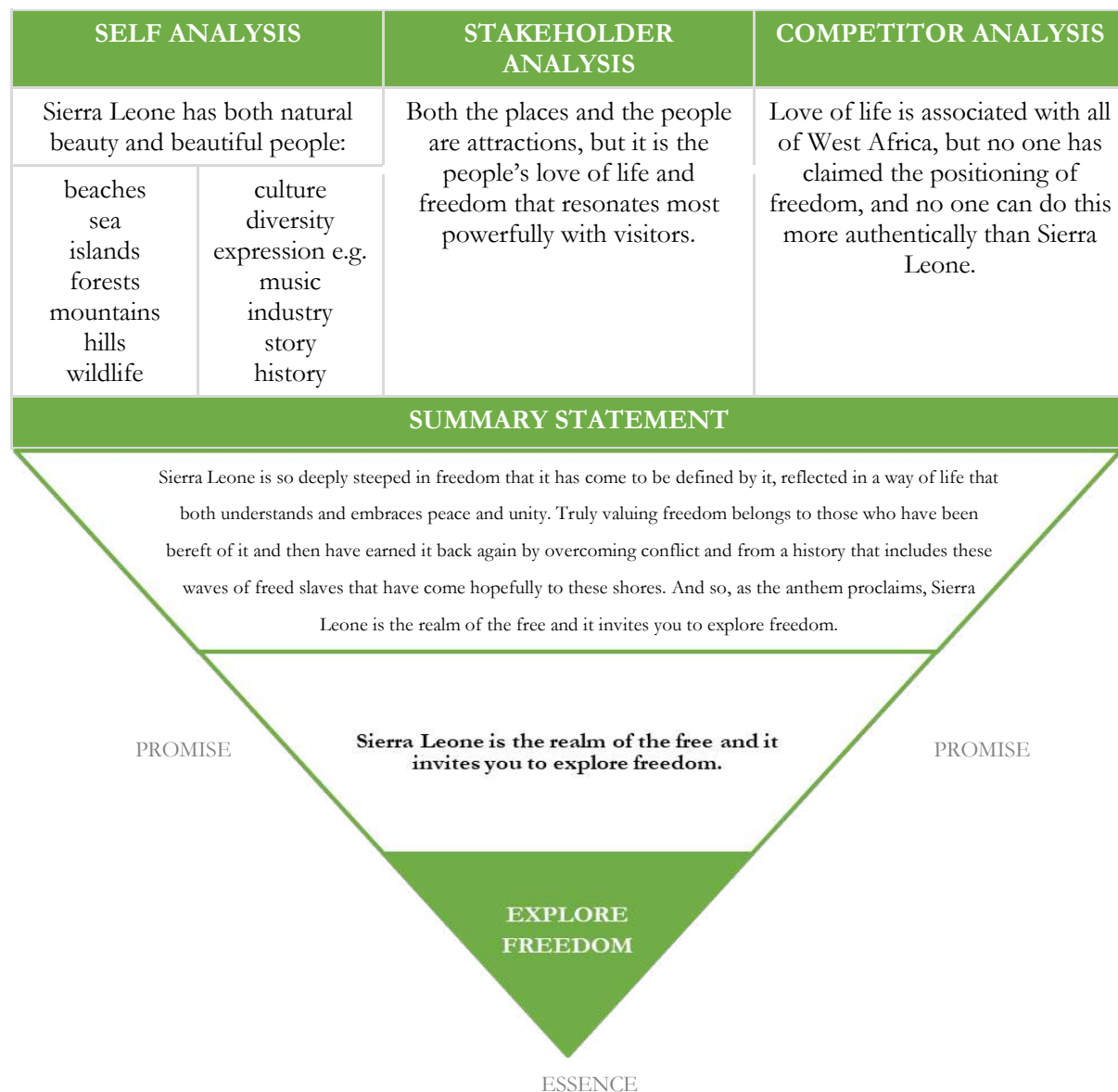
ESSENCE	
Freedom	Love of life
RATIONALE	
<p>Sierra Leone is so deeply steeped in freedom that it has come to be defined by it, reflected in a way of life that both understands and embraces peace and unity.</p> <p>Truly valuing freedom belongs to those who have been bereft of it and then have earned it back again by overcoming conflict and from a history that includes these waves of freed slaves that have come hopefully to these shores.</p> <p>And so, as the anthem proclaims, Sierra Leone is the realm of the free and it invites you to explore freedom.</p>	<p>There is such an exuberant sense of pure joy and happiness that surrounds you in Sierra Leone, in the free and easy warmth, friendliness and helpfulness of its people.</p> <p>The colourful cultural diversity is united in its resilient determination to be genuinely hospitable, kind and protective.</p> <p>Here you will find it easy to leave your troubles behind you and rediscover yourself.</p>

<p>The <i>freedom</i> positioning concept is powerfully authentic to Sierra Leone because of its history, e.g.:</p> <p style="text-align: center;">Bunce Island The Freedom Tree The Maroon Church Thomas Peters Bai Bureh Madam Yoko A capital City called Freetown.</p> <p>It is a positioning concept that also begins to change the negative narrative of the civil war by drawing attention to the positive narrative of Sierra Leone's history.</p> <p>Sierra Leone's history of freedom is fact, the most powerful differentiator possible.</p>	<p>Where the <i>freedom</i> positioning is substantiated by facts of history, this <i>love of life</i> positioning concept is emotionally subjective – it is a feeling rather than a fact.</p> <p>It is also not a differentiator. Both Ghana and The Gambia use a version of it in their positioning:</p> <div style="display: flex; justify-content: space-around; align-items: center;">   </div> <p>If the tour operator research is taken into account what is shown is that culture is the generic positioning for West Africa, so Sierra Leone in effect already have this as a property by virtue of geography.</p>
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So, Sierra Leone's history provides the differentiator of *freedom*.

A brand promise is distilled as follows:

Figure 17: Tourism brand promise distilled



The promise has both stretch and longevity because it accommodates the full range of Sierra Leone's wonderful attractions:

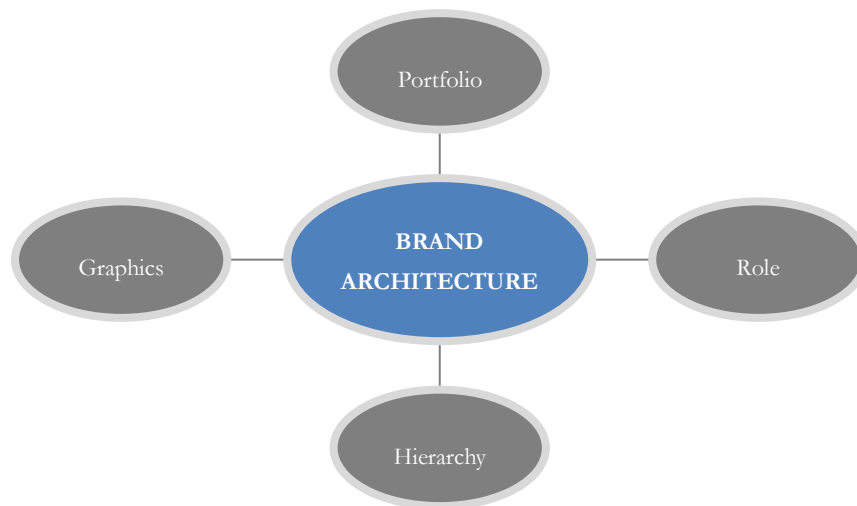
The brand essence becomes the **slogan**:

Explore Freedom

3.4.3 Brand architecture

Brand architecture needs to cover the following:

Figure 18: Components of architecture



- The *portfolio* identifies what brands are required to deliver on the objective.
- The *roles* describe what each brand in the portfolio does strategically and in communication.
- *Hierarchy* dictates how the brands in the portfolio relate to each other.
- And *graphics* is the design of the brand identity.

In terms of *portfolio* the project identified the need for only one brand: Sierra Leone's destination brand.

But in formulating this brand architecture the following has to be taken into account into the future:

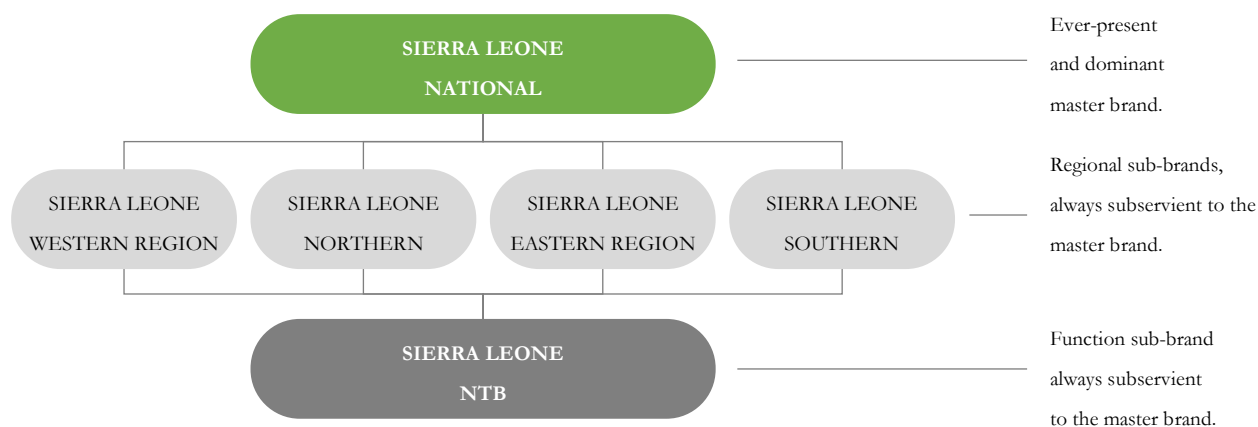
- The four regions may want to develop an evolution of the national brand identity: Western (Freetown), Northern (Makeni), Eastern (Kenema) and Southern (Bo).
- A brand identity for the NTB.

The *roles* that each brand plays are described as:

PORTFOLIO	STRATEGIC ROLE	COMMUNICATION ROLE
SIERRA LEONE NATIONAL	A national destination brand that resonates with tourism stakeholders in the target markets.	Positions Sierra Leone as the realm of the free that invites you to explore freedom.
SIERRA LEONE REGIONS	Regional destination sub-brands that resonate with tourism stakeholders and target markets.	Positions the regions of Sierra Leone as realms of the free that invites you to explore freedom.
SIERRA LEONE NTB	A national destination sub-brand that designates the NTB as responsible for promoting Sierra Leone as a destination.	Positions the NTB as responsible for promoting tourism to Sierra Leone.

In terms of *hierarchy* the portfolio relates as follows:

Figure 19: Tourism brand hierarchy



In terms of *graphics* the following is Sierra Leone's brand identity, explained in terms of its iconography (why it has been designed the way it has):

Figure 20: Tourism destination brand identity (logo)

It incorporates icons and colours that represent attractions:

- Beach
- Sea
- Forest
- Culture



It is inspired by the Sierra Leone National Flag which positions it as a national asset.



A typeface which is unique to Sierra Leone

And our slogan which is the essence of our positioning

The following is the NTB brand identity which incorporates the national tourism brand identity but ensures that the NTB is given the gravitas and status it deserves:

Figure 21: National Tourism Board brand identity (logo)

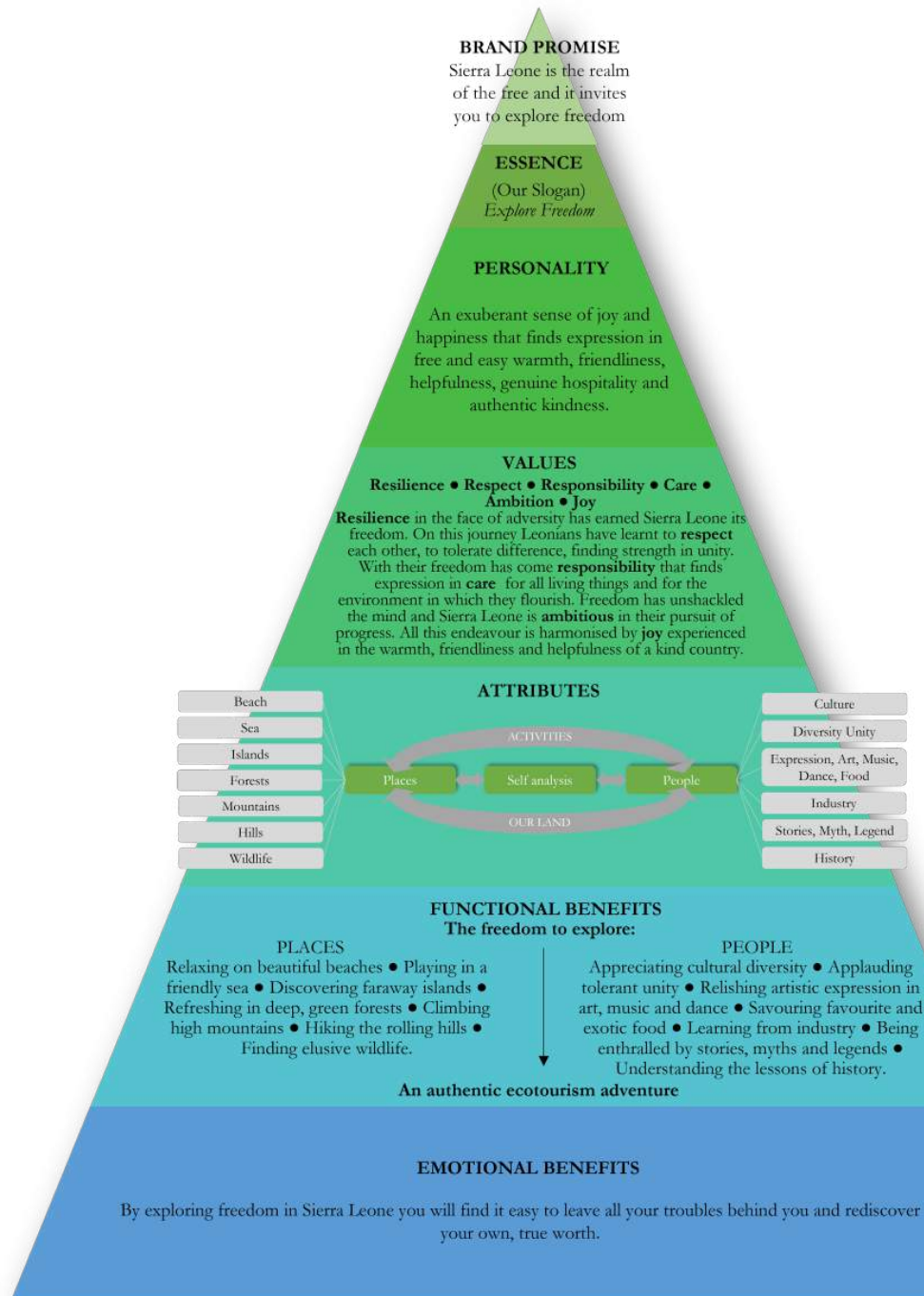


For versatility in applying a horizontal and stacked version have been prepared.

3.4.4 Brand expression

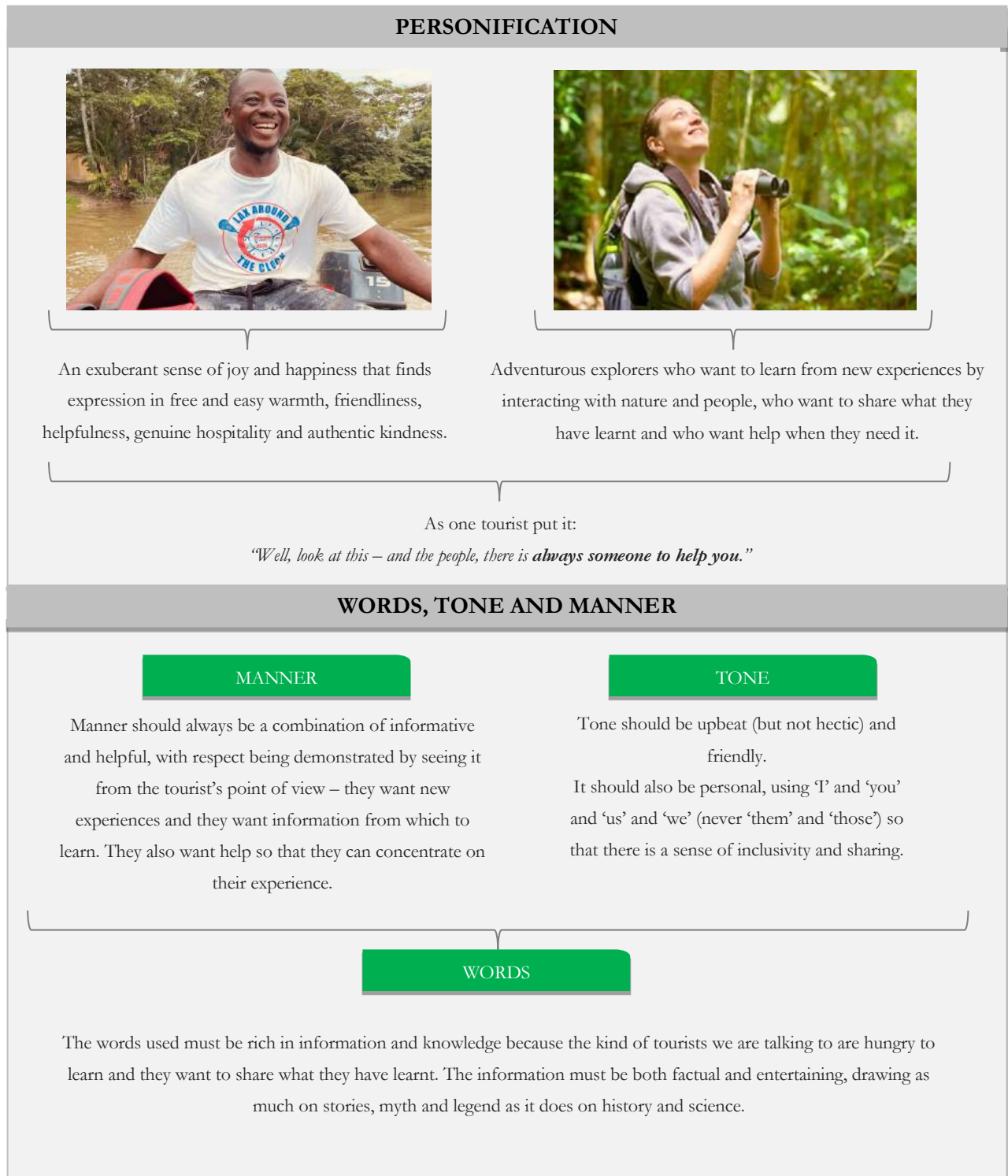
The *formal brand expression* is extrapolated from the brand vision and draws on both the *freedom* and *love of life* positioning concepts:

Figure 22: Brand pyramid summarized



Where the formal brand expression established roles these *creative guidelines* purposefully establish consistency of in brand communication, which is important because consistency advances visibility, recall and trust.

Figure 23: Key elements of brand expression



VISUAL LANGUAGE

- In terms of **color** the green, white and blue of the Sierra Leone national flag must dominate, but Sierra Leone is a colorful place so there must be accent colors.
- In terms of **graphics** we need to take our lead from the finally selected brand identity (the free-flowing feel of the flag and the graphic treatment of the icons and the natural authenticity of the typeface.)
- **Photographic** treatment must show the natural beauty and the beautiful people and there needs to be a careful balance between places and people.

Wherever possible the picture should include both place and people but this must not be forced.

Instead of this..... this.



CREATIVE PLATFORM

The **creative platform** should be Leoneans **sharing** their history, stories, myths and legends, their arts, their music, their crafts and the love they feel for their land, recalling the Honorable Minister of Tourism and Culture's words:

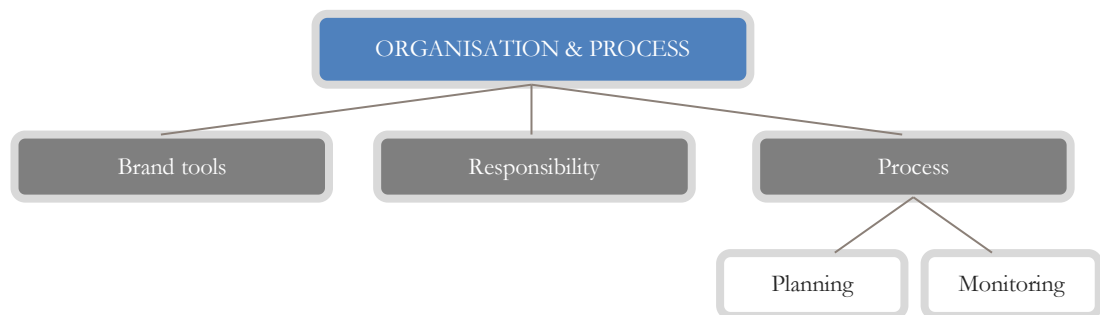
"That woman working the land, that young boy selling fruit on the beach, that man on his akada in Kabala, the musician, the dancer, the town crier, the weaver, it's a whole song and it needs to be communicated."



3.4.5 Brand organization

Ensuring that the brand is protected and built requires organization and process:

Figure 24: Brand organizational elements

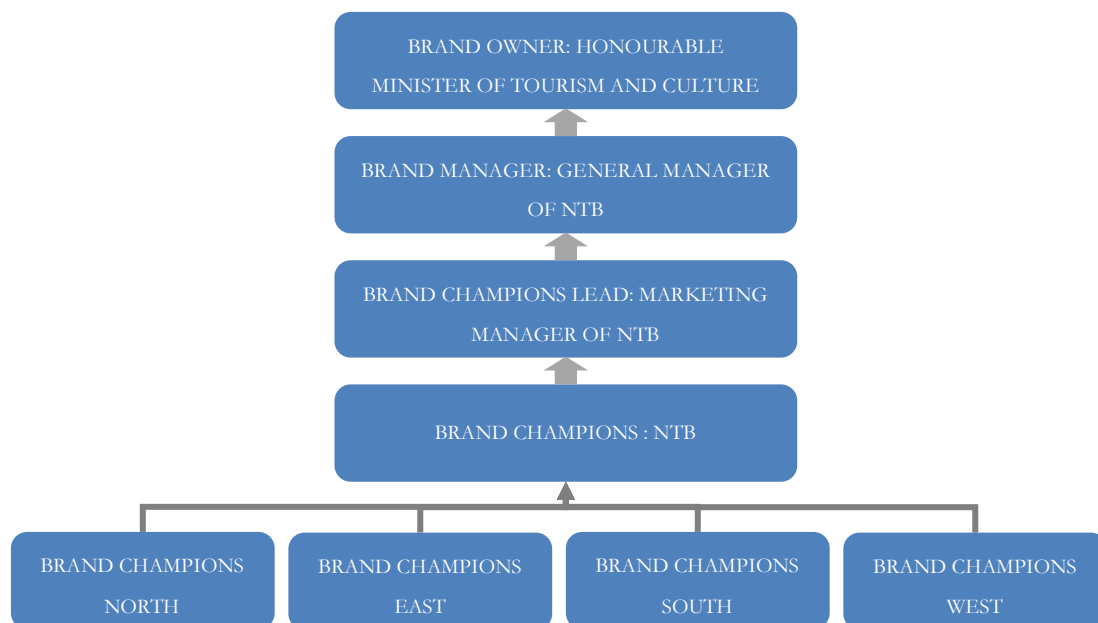


The following *brand tools* need to be developed:

- A *brand manual* is part of this project.
- In addition it would be useful to have a *quick reference brand identity application guide*.
- A *Brand Kit* should be created. This is essentially a dynamic filing and reference system for all brand collateral.

As regards *responsibility* the following is recommended:

Figure 25: Proposed brand organizational structure



- It is essential that the Brand Champions receive *training*. The first phase of this is included as part of this project and it will concentrate on how to properly use the brand manual. In addition:
 - A *brand induction* presentation and process needs to be built and implemented to ensure any newcomers to the NTB Brand Champion team are properly onboarded in brand terms.
 - On an annual basis all NTB Brand Champions should take part in a *Brand Refreshment Conference* with one of the deliverables being an update to the brand strategy and the brand manual.

3.5 Target markets

The following section set out the target market strategy in terms of both source markets and market segments.

NOTE: *A detailed overview of targeted source markets and market segments is attached as Appendix 1, indicating market profiles of such target markets and a range of practical and contact information relating to relevant tour operator partners, online forums and associations, trade shows and other distribution and promotion channels.*

3.5.1 Targeted source markets

In developing a target market strategy, potential source markets were analysed in terms of both:

- Their tourism value potential (outbound market size, extent and growth of holiday travel, demand for experiential travel and new destinations, travel expenditure per day and per trip) and
- The relative ease of attracting and converting travelers to Sierra Leone (proximity and travel time to Sierra Leone, language compatibility, air access, affinity for and ties to Sierra Leone).

The conclusion is as follows, as presented in Figure 26 below.

Source markets to focus on in the short term

During the next *five years*, NTB will focus its resources on attracting tourists from those markets that:

- Fulfil both the criteria of having higher tourism value potential *and* are easier to covert. They are Sierra Leone's *Core Source Markets*.
- Have more limited value potential but are easier to covert. They are Sierra Leone's *Captive Source Markets*.

The following markets fall in these two target market categories:

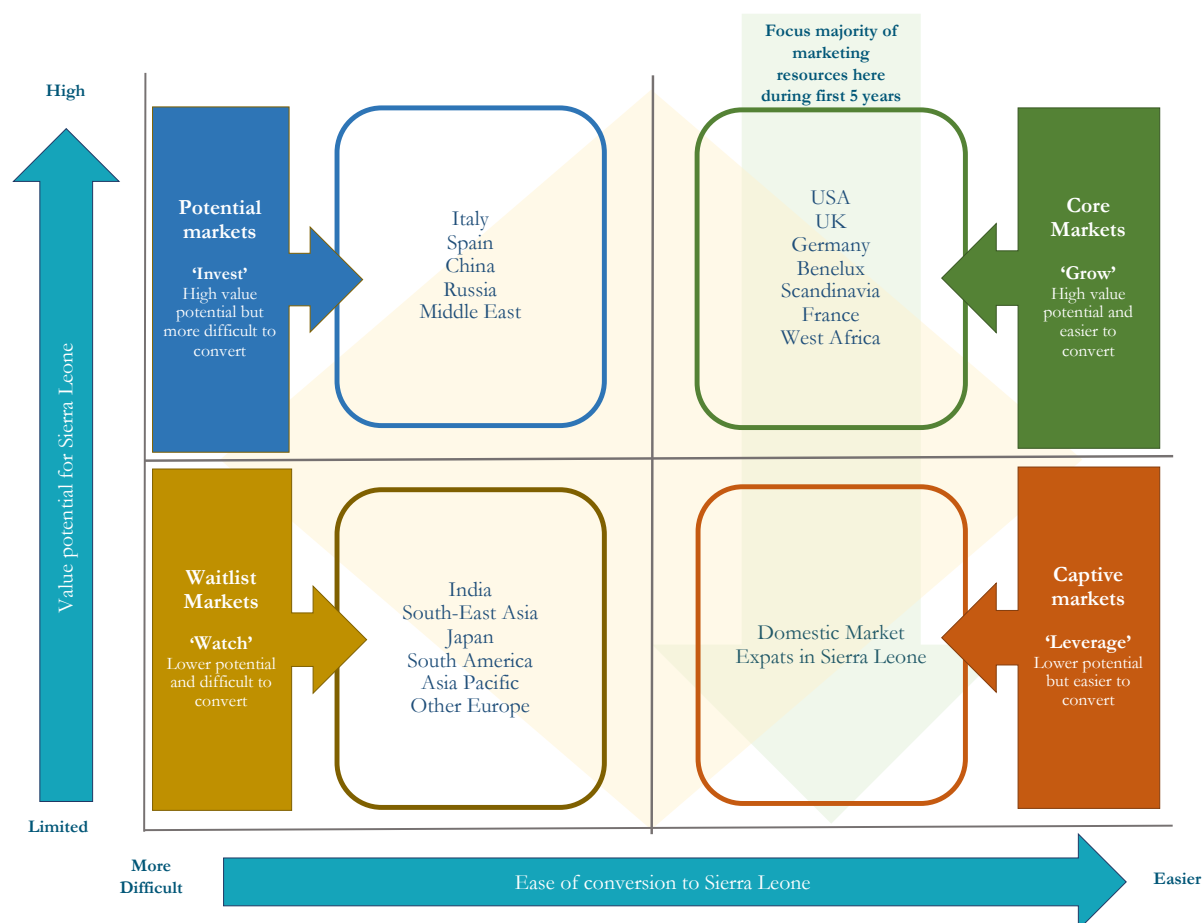
- **Core source markets:** Easier to convert (although not as easy as Captive markets), but with higher growth potential.
 - Americas: USA and Canada (especially capitalizing on Sierra Leone diaspora, historical ties and networks).
 - Europe: UK, Germany, France, Benelux (capitalizing on market size, affinity for experiential travel, air connections and language affinity and ability) and Scandinavia (mainly Sweden).
 - West Africa: Ghana, Nigeria and neighboring countries (capitalizing on market proximity).

Core Markets Strategy: The marketing strategy will focus on growing these markets as fast as possible to achieve consistent flow of higher value foreign travelers, as a basis for expanding to other potential source markets.

- **Captive source markets:** Easier to convert but with more limited growth potential.
 - Sierra Leone domestic market, with a focus on middle to upper-income households.
 - Foreign expats in Sierra Leone, with a focus on foreign diplomatic corps, NGO staff, staff of International Cooperating Partners and international staff of foreign corporations.

Captive source markets strategy: The marketing strategy will focus on leveraging value from these markets, as an easy way of generating demand and “firing up” the industry with limited marketing spend, especially while international tourism recovers from COVID-19.

Figure 26: Target Source Markets and Approaches for the next five years



Source Markets to focus on in the medium term

From year six onwards, NTB will consider expanding its market reach and, in addition to the core and captive markets, focusing resources on attracting tourists from those markets that:

- Have higher tourism value potential *but* are more difficult to convert. They are Sierra Leone's *Potential Source Markets*
- Have more limited value potential and are more difficult to convert. They are Sierra Leone's *Waitlisted Source Markets*

The following markets fall in these two target market categories:

- **Potential source markets:** Higher growth potential but more difficult to convert, due to language differences, poorer flight connections and longer flying times
 - Europe: France, Italy and Spain, markets with substantial appetite for experiential travel, but with a traditionally small footprint in West Africa, some language challenges
 - Russia, based on the bilateral agreement between the GoSL and GoR to promote trade and tourism between the two countries and to waive visa requirements
 - China, where the demand for adventurous travel is growing, but with poor flight connections, long flying times, language challenges and very low market awareness.

- Middle Eastern countries (mainly Saudi Arabia), due to religious tolerance/affinity and appetite for tropical environments

Potential source market strategy: The marketing strategy will focus on growing these markets, only once the core markets and captive markets have been fully entered and covered.

- **Waitlisted source markets:** Limited growth potential and more difficult to convert, due to limited appetite for experiential travel, longer flying times
 - India, Southeast Asia (Korea, Japan), Asia Pacific (Australia), South America (Argentina, Brazil)

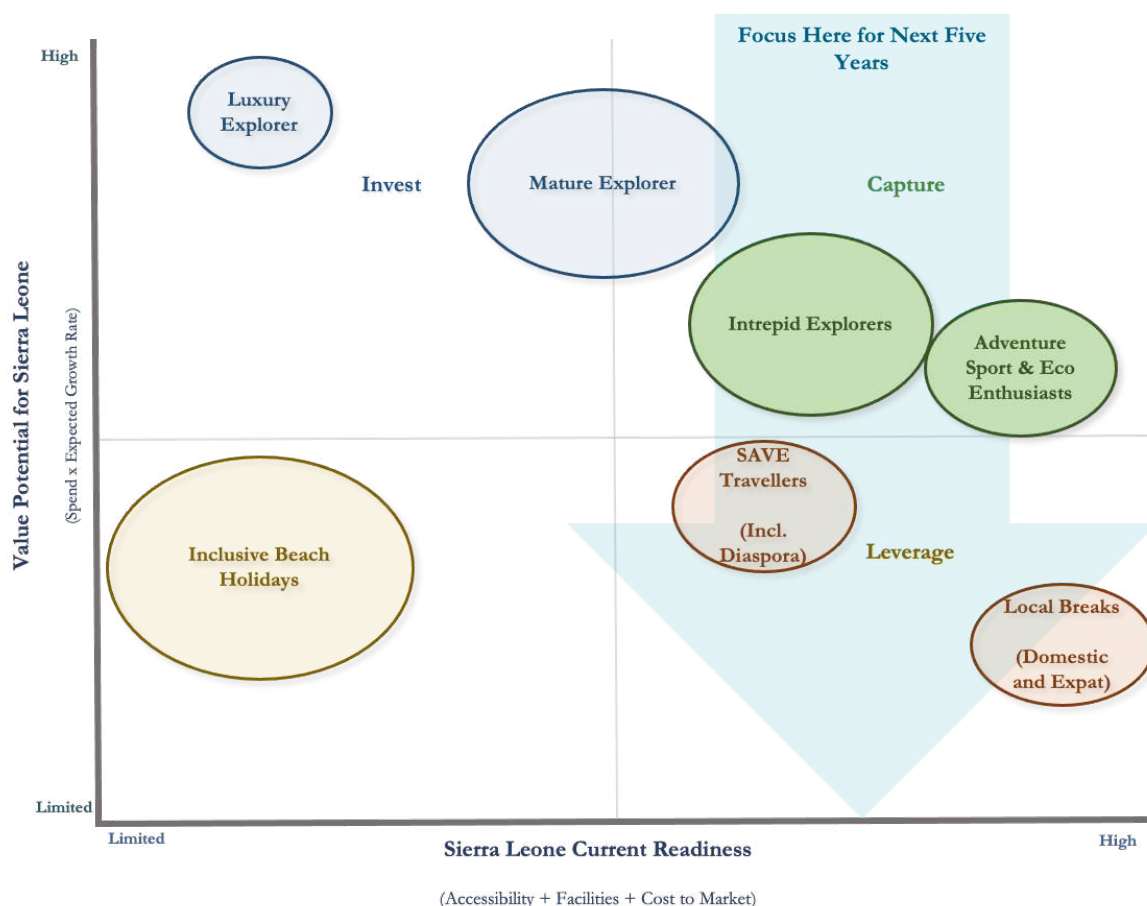
Waitlisted source market strategy: The marketing strategy will keep an eye on these markets and wait for potentially highly targeted, tactical marketing opportunities.

3.5.2 Targeted market segments

The following market segments will be targeted and promotional methods, product development and packaging, distribution channels and pricing will be geared at reaching and attracting these traveler types.

NOTE: See Appendix 1 for detailed description and practical promotional contact details.

Figure 27: Summarised target segment strategy



Short-term segments (to be targeted during the next five years)

1. Intrepid Explorer	
	
Overall description	General adventurous touring and exploration by couples and small groups. While independently organised travel is popular among this segment, pre-arranged reception, guiding and ground arrangements in Sierra Leone will be important for many. Confident “hard” exploration - looking for the “real” Africa, in search of extraordinary experiences and will be prepared to go the extra mile, go to less visited places and sacrifice comforts to do so.
Targeted source markets	<p>Short term: Domestic and Expat breaks. Core markets in Europe.</p> <p>Medium term: All Europe source markets and expand to other promising markets.</p>
Typical profile	<ul style="list-style-type: none"> • Budget to mid-priced. • 25-50 years. • Male and female. • Booking lead times (pre-COVID): 3 to 6 months. • Adventure, adrenaline, wildlife, cultural and environmental interaction (in its broadest sense). Community-based experiences (food, attending local ceremonies, etc.) a major advantage. • Sustainable management of tourism experiences is very important.
Accommodation	<ul style="list-style-type: none"> • Typically Class 2-4. • Quality and nature of hotels and catering not a particular priority, prepared to have basic service levels if the experience is special. • Hygiene and safety standards remain important.
Distribution channels	<ul style="list-style-type: none"> • Leaning heavily towards online channels - online reservations, information from websites, social media and forum groups. • Guidance by Sierra Leonian inbound operators and knowledgeable friends and relatives important.
Product development opportunities	<ul style="list-style-type: none"> • Engaging local product owners and communities in packaging and developing circuits including accommodation, cultural interaction, eco experiences, rest points, camp sites, etc. • Local operators to provide essential transportation and guiding arrangements and work towards independent travel being easy and popular within next 10 years. • Develop trails and activities in National Parks, at lakes, etc. Ensure visitor safety e.g. walkways, viewing platforms, safety railings, etc. • Working with local communities in developing thematic tourism e.g. tracking endemic bird, animal and plant species, indigenous canoe rides, cycling in the community, staying with a local community, exploring local food. • Promote investment in tourist class hotels, guest houses and other facilities. • Improve visitor facilities at key sites (toilets, curio shops, shaded seating, etc.). • Improve visitor management e.g. information, ticketing, capacity management, etc. • Major focus on improved interpretation and guiding.

2. Outdoor Adventure and Eco Enthusiasts



Overall description	<p>A collective segment of adventurous outdoor activity and sport interests. There is often a significant element of skill and risk involved. Always looking for new experiences and locations.</p> <p>Key niches to consider are marine activities like sport fishing, kayaking, diving, surfing and windsurfing, etc. and terrestrial activities like adventure cycling, motorbiking, triathlon/endurance racing, long-distance trekking, etc.</p>
Targeted source markets	<p>Short term: Bird watching, forest and mountain hiking/trekking/running and sport fishing.</p> <p>Medium term: Surfing and other water sports.</p> <p>Short-term focus:</p>
Typical profile	<ul style="list-style-type: none"> • Budget to mid-priced (US\$30 to US\$120 per room night), accommodation preference will depend on traveler profile. • 25-55 years. • Key motivation will be the particular activity and they will travel mainly for purposes of practicing the activity they are passionate about. • The appeal is often about discovering “the best” opportunities and species (e.g. new endemic bird species, largest fish species) and ticking them off on the “list”. • Depending on planning involved, lead times could be 3 months to a year. • They are often accompanied by spouses and/or family members and for some sightseeing, cultural experiences and relaxation will be important additions. • Travel could form part of charity and teambuilding events.
Accommodation	Ranges from Class 1 to Class 3, depending on profile of the participant.
Distribution channels:	Self-organised by friendship/interest groups, clubs/associations or individually; in Sierra Leone they will depend on arrangements by local contacts, hotels or through a specialist local operator.
Product development opportunities	<ul style="list-style-type: none"> • Provision of public amenities and facilities at key attraction spots. • Step up protective measures/barriers/law enforcement where necessary to keep resources intact. • For birders and ecotourists, develop visitor facilities e.g. pathways, viewing platforms, hides, signage. • Work with local tourism stakeholders and local communities in mapping and layout of hiking, running and biking trails at more accessible heritage sites and forest areas, develop a marine adventure circuit. • Work with communities in developing camping, local lodging, guiding services. • Capacity building of adventure sport and other specialist guides, especially techniques and safety requirements. • Provision of ground-handling arrangements and support. • Arrangements for emergency and medical services. • Anchor events strategy to partner 2-3 major event organisers, focusing on adventure sport and living culture.

3. SAVE Travellers



Overall description	<p>SAVE tourism comprises Scientific, Academic, Volunteer and Education tourism, with the two latter types comprising the largest segments within this niche market.</p> <p>These are visitors who use travel to learn, explore, help and grow cultural and natural heritage preservation efforts and contribute to the improvement of local communities.</p> <p>For the purposes of this strategy the Sierra Leonian Diaspora is included here.</p>
Targeted source markets	<p>Short term: Sierra Leonian Diaspora in USA.</p> <p>Voluntourists in Europe and USA.</p> <p>Medium term: Student exchange programs from all markets.</p>
Typical profile	<ul style="list-style-type: none"> • Diaspora of all age groups. • Voluntourism leaning towards Millennials and Generation Z travelers, keen to try new things and engage in skills-based learning while travelling. • In search of self-actualising encounters that will enrich their lives and those of others. • Well educated. • Driven by the desire to engage in travel experiences involving close interaction with the nature, culture and people of the destination in ways that advance knowledge (their own or that of others) or that involves contribution to the enhancement of the destination. • Place high value on the natural, social and cultural assets of the place they visit and adhere to the principles of sustainable tourism. A lack of development can be an attraction in itself as they enjoy off-the-beaten-track unique experiences where infrastructure is lacking. • Can play an important role in nurturing tourism development. They tend to travel to places that others avoid, tolerate and even enjoy rustic conditions, and don't mind delays and inconveniences; the experience is what matters.
Accommodation	<p>Class 1 to 4, depending on the niche. Volunteers and educational exchange students usually prefer community-based accommodation; Sierra Leonian diaspora usually require higher quality accommodation.</p>
Distribution channels	<p>Word-of-mouth and social media are very powerful in raising awareness.</p> <p>Booking and conversions through specialist operators.</p>
Product development opportunities	<ul style="list-style-type: none"> • The various culture and nature conservation authorities to provide opportunities for volunteer support in nature conservation, wildlife protection, wildlife monitoring, mapping and zoning, etc. • Arrange for participation opportunities in community-based tourism. • Development of student exchanges.

4. Mature Explorers



Overall description	<p>Cautious “soft” exploration – lured by mystique of Sierra Leone’s variety of unique natural and cultural heritage. Well-travelled, environmentally and culturally conscious and always looking for new places to explore.</p> <p>Fulfilling the explorer spirit; looking for somewhere different while considering risks– it’s partly about sharing the story.</p>
Targeted source markets	<p>Short term: Domestic and Expat breaks. Core markets in Europe and USA.</p> <p>Medium term: All Europe source markets and new emerging markets.</p>
Typical profile	<ul style="list-style-type: none"> • Large potential growth segment. • Medium to higher volume, mid to higher priced (US\$80 to US\$150 per room night). • Booking lead time around 6 months. • 35-70 years, some families but mostly traveling without children. • Primary interests are the virgin beaches coupled with key national parks and wildlife highlights as a “bucket list” experience. • Secondary interests are local culture, history and heritage and soft adventure (e.g. marine and trekking activities, helicopter flights, etc.), scenery. • Sustainable management is increasingly important.
Accommodation	<ul style="list-style-type: none"> • Mainly Class 1 and 2 hotels. • Value for money expected at hotels, with good food, catering, guiding, etc. important.
Distribution channels	<ul style="list-style-type: none"> • Awareness through traditional press, social media and word of mouth. • Research the destination on internet. • booking packages through tour operators and travel agents.
Product development opportunities	<ul style="list-style-type: none"> • Small and medium-sized, mid-range, eco-sensitively designed hotels and lodges in and around National Parks and on sensitive island areas. • Human resources development, especially language and guiding capabilities. • Expanded range of bookable “soft adventure” activities guided in English e.g. forest walks, horse-riding, cycling, quad biking, sea kayaking, etc. • Authentic cultural interaction, especially “living” cultural experiences: Sierra Leonian music, art, culinary experiences, agro-tourism, etc. • Experiencing town life in Freetown and other key cities – tourist information, pedestrianizing, seating, etc.

5. Luxury Explorers



Overall description	Low volume, high value tourists who require exclusive and personalised experiences, stay in luxury and often unique accommodation and often fly-in to remote locations.
Targeted source markets	Short term: USA and Europe as core markets. Medium term: Expand to other markets as the segment develops.
Typical profile	<ul style="list-style-type: none"> • Low volume, high priced. • Mostly 50 -70 years. • Lead times: 3 to 6 months. • Expect exclusivity of experience and personal service and prepared to pay for it. Well-travelled and expect a high-quality, exclusive wildlife viewing and beach experience in pristine environment with unique species to be seen. • Helicopter or light aircraft trips from base destination or on a circuit of lodges to experience the best diversity on offer. • Walking and driving safaris in safari vehicles. • Keen on other activities such as guided canoeing/kayaking, game fishing, etc. • Sustainability is increasingly important.
Accommodation	<ul style="list-style-type: none"> • Pampered forest and beach luxury with excellent food and extraordinary room designs, finishes and amenities. Personal service such as highly knowledgeable ranger assigned to each group.
Distribution channels	<ul style="list-style-type: none"> • Mostly direct with luxury lodge management companies or through high-end travel agencies.
Product development opportunities	<ul style="list-style-type: none"> • Opening up new concession areas in parks and conservation areas through proper research and transparent concession. • Engaging local communities in awareness regarding requirements of luxury investors and land tenure. • Leveraging value from, high value locations under less-productive leasehold conditions.

6. Inclusive beach holidaymakers



Overall description	Desire to completely relax with all services provide, including some fun water and social activities. Excellent food choices, clean beaches, pool and spa are expected.
Targeted source markets	Core markets in Europe and USA. Enter new markets as the segment develops.
Typical profile	<ul style="list-style-type: none"> Usually to higher volume, price range from budget to mid to higher priced (\$50 to US\$200 per room night) – Sierra Leone should focus on smaller/medium volume and mid-to higher price ranges. Booking lead time from 2 weeks to months. All age groups, with peak 40-60 years economically active , some families but mostly traveling without children. Primary interests are the tropical beaches and soothing climate. Secondary interests are shopping, soft activities.
Accommodation	<ul style="list-style-type: none"> Mainly Class 1 hotels Value for money expected at hotels, with good food, catering, guiding, etc. important.
Distribution channels	<ul style="list-style-type: none"> Mainly wholesale tour operators in key markets with customer conversion through online booking, OTAs or travel agencies Marketing through electronic and mainstream media
Product development opportunities	<ul style="list-style-type: none"> For Sierra Leone, the focus should be on developing a higher value proposition, with smaller and more intimate resorts, hotels and beach lodges. Investment promotion should focus on attracting smaller, boutique style resort developments with eco-sensitive designs, in line with the sustainable tourism value proposition. Identifying key sites and secure land tenure systems will be key. Human resources development, to ensure excellent service, culinary experiences, guiding, spa experiences will be key. Expanded range of add-on activities, for the guided in English e.g. forest walks, horse-riding, sea kayaking, stand up paddling, snorkelling, etc. Shopping for handicrafts, etc. will be important.

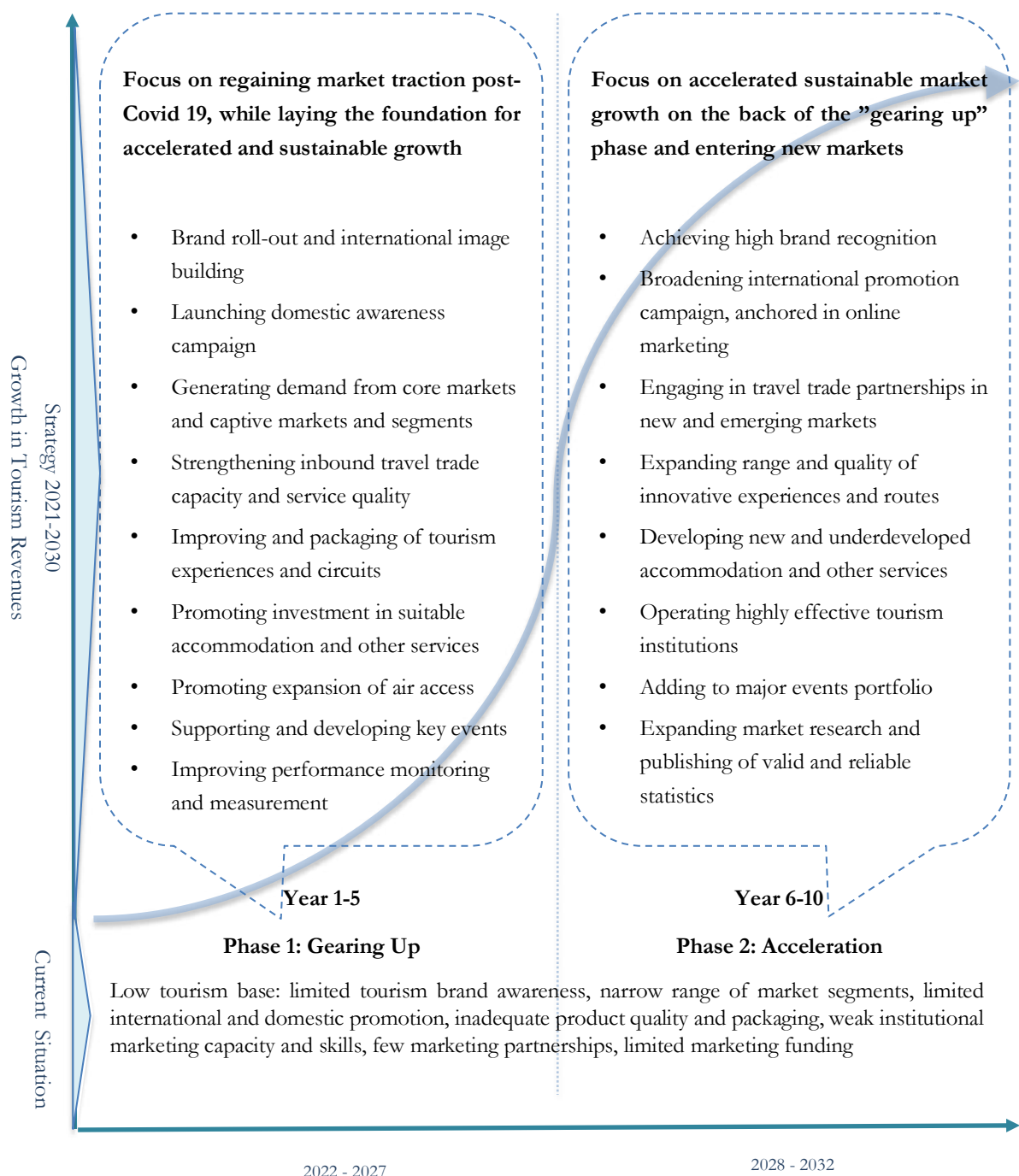
4 Implementation

The following section sets out the phasing and key initiatives for implementing the strategy.

4.1 Implementation phasing

Given the fact that Sierra Leone has entered the early stages of the tourism destination life cycle, a phased approach is envisaged for building up tourism over the next 10 years, as presented in Figure 28 below.

Figure 28: Phased implementation of Sierra Leone tourism branding and marketing strategy



4.2 Implementation thrusts and strategies

Marketing implementation in the two phases will address improvement of the entire destination marketing mix (promotion, product, place [distribution channel] and price [value]), and will entail the following thrusts and strategies:

Figure 29: Implementation thrusts and strategies

Thrust 1: Destination branding and promotion	Thrust 2: Product development & packaging	Thrust 3: Effective delivery and value improvement
<p>Strategies</p> <ol style="list-style-type: none"> Ensure well-branded and maintained marketing and information collateral <ul style="list-style-type: none"> Phase 1: Rebrand existing print materials and improve digital media Phase 2: Refine digital technologies and platforms Implement a domestic travel and awareness campaign <ul style="list-style-type: none"> Phase 1: Launch domestic tourism travel and awareness campaign Phase 2: Renew and adapt domestic tourism campaign in accordance with results of Phase 1 Implement an integrated international brand and image campaign <ul style="list-style-type: none"> Phase 1: Focus on: <ul style="list-style-type: none"> Explorer, Adventure and Sport Enthusiasts and SAVE segments Core Source Markets Phase 2: Focus on conversion in Core markets and segments and awareness in <ul style="list-style-type: none"> Beach Holidays Investment Source Markets 	<p>Strategies</p> <ol style="list-style-type: none"> Package, develop and promote suitable tourism circuits <ul style="list-style-type: none"> Phase 1: Scope , develop and promote main circuits Phase 2: Expand to include local circuits Package and promote suitable investment opportunities <ul style="list-style-type: none"> Phase 1: Accommodation improvement and expansion in prime tourism areas aimed at Explorer, Outdoor Adventure and Eco Enthusiasts and SAVE segments Phase 2: Expand to additional areas, Luxury and Beach Holiday segments Launch a suitable tourism events program <ul style="list-style-type: none"> Phase 1: Set up events program and launch the International Freedom Festival as anchor event with international and domestic appeal Phase 2: Expand events portfolio 	<p>Strategies</p> <ol style="list-style-type: none"> Strengthen private sector tourism delivery capacity <ul style="list-style-type: none"> Phase 1: Institute a training, coaching and capacity building program for inbound tour operators Phase 2: Expand capacity building to include other industry sectors Strengthen tourism statistics, research and performance measurement <ul style="list-style-type: none"> Phase 1: Collect, analyze and publish regular, valid and reliable tourism statistics and results of a tourism exit survey Phase 2: Expand information management and investigate feasibility of a Tourism Satellite Account

4.3 Implementation activities

The following activities will be undertaken to implement the strategies outlines above.

4.3.1 Thrust 1: Destination branding and promotion

Strategy 1.1: Ensure well-branded and maintained marketing and information collateral

Element	Actions
Phase 1: Rebrand existing print materials and improve digital media	
Brochures	<ul style="list-style-type: none">• Visitor guide: Rebrand and redesign the Official Visitors Guide for limited B2B distribution and print 500 copies• Visitor Map: Print additional 10,000 copies of the Official Visitor Map• Poster series: Design a series of five to ten posters for hanging in NTB and MoCTA offices, foreign affairs missions, airport, other government offices and private establishments to showcase the iconic sites of Sierra Leone <p><i>NOTE: A rebranded visitor map has been designed and 500 copies printed under this marketing strategy and rebranding project</i></p>
Website	<ul style="list-style-type: none">• Website and blog: Establish, maintain and promote a high quality NTB “Explore Freedom” website and blog <p><i>NOTE: The destination website has been fully developed and populated under the SLEDP tourism project</i></p>
Social media	<ul style="list-style-type: none">• Social Media platforms: Maintain “Explore Freedom” social media platforms in support of the destination marketing campaign:<ul style="list-style-type: none">○ Facebook Page○ Instagram account○ YouTube account <p><i>NOTE: Destination social media pages have been set up and populated under the SLEDP tourism project.</i></p>
Video	<ul style="list-style-type: none">• Produce a portfolio of exciting short videos, using where possible NTB’s existing video footage:<ul style="list-style-type: none">○ Hero video: 5 min○ Short videos: 2 min
Stakeholder database	<ul style="list-style-type: none">• Stakeholder database: Establish and maintain a destination stakeholder database including:<ul style="list-style-type: none">○ International travel trade (traditional and online trade)○ Sierra Leone travel trade○ Target market associations, clubs and interest groups○ Other Sierra Leone tourism-related stakeholders <p><i>NOTE: A list of suggested tour operators and social media groups pertaining the various target markets is attached as Appendix 1</i></p>
Newsletter	<ul style="list-style-type: none">• Newsletter template: Design and produce an email newsletter template for distribution to stakeholder database

Element	Actions
Image Library	<ul style="list-style-type: none"> • Organize library of existing images and videos: Create an organized image library by categorizing, tagging, organizing and storing in Cloud the current portfolio of still images and video footage for use in digital media (website, electronic brochure, social media channels) as well as print and outdoor branding • Add Images and footage: Identify and fill key gaps in images and footage

Phase 2: Refine digital technologies and platforms

Brochures	<ul style="list-style-type: none"> • Digital brochure: Develop digital destination brochure covering product and target market experiences • Adapt collateral portfolio: Assess the need for printed marketing collateral and adapt portfolio and print run in accordance with market needs
Website	<ul style="list-style-type: none"> • Improve website: Improve website capabilities and contents, especially w.r.t. mobile friendliness, accessing maps for travel circuits and attraction locations, adding new contents and update with new plug-in WordPress features • Expand blog: Involve industry partners in publishing regular blog posts, repurpose blog articles for social and mainstream media use
Social media platforms	<ul style="list-style-type: none"> • Adapt social media presence: Based on the following built up in Phase 1, upgrade where necessary to capitalize on new technology development and trends • Broaden social media following: through consistently implementing a clearly formulated social media communication plan in support overall marketing campaign • Track expansion: Track brand presence and market awareness on social media and adapt implementation accordingly
Stakeholder database	<ul style="list-style-type: none"> • Standardize data procedures: Standardize systems for staff and stakeholders to provide and add contact in stakeholder database • Expand and maintain the stakeholder database: Ensure that the database is up-to-date and is searchable and provides for targeted stakeholder communication
Newsletter	<ul style="list-style-type: none"> • Media toolkit: Set up a travel trade and media toolkit with relevant information (Q&As), publish of the website and distribute to relevant
Video	<ul style="list-style-type: none"> • Expand portfolio of exciting short videos: <ul style="list-style-type: none"> ○ Short videos: 2 min ○ Live Local Travel' Video production and promotion
Image library	<ul style="list-style-type: none"> • Expand the image library and focus on exceptional footage and images pertaining to the positioning and branding elements

Strategy 1.2: Implement a domestic travel and awareness campaign

Concept

NOTE: A detailed campaign plan has been approved and key elements of the campaign have been launched by NTB under the SLEDP tourism project

To mitigate the ongoing risk to Sierra Leone's tourism sector and build a strong base for international tourism, it is necessary to implement a robust domestic tourism marketing strategy and campaign, which will foster a vibrant culture of travel amongst Sierra Leonean residents and help to position tourism as a vehicle for economic diversification and sustainable source of revenue generation. The campaign is underpinned by two main goals, namely:

- *Domestic Travel Stimulation:* Which entails marketing tourism experiences and destinations, as well as packaged travel opportunities, to the domestic market – measured by number of people that travel and spend
- *Domestic Tourism Awareness Raising:* Which entails communicating opportunities and benefits of tourism for all Sierra Leoneans, the importance of excellent service delivery and the responsibility of all citizens to ensure a vibrant and successful tourism sector

Based on the objectives of the campaign, the following core narrative and content pillars have been identified for PR, Content Marketing and Social Media content creation.

Domestic Tourism Awareness		Domestic Travel Stimulation	
Importance of Tourism Service Delivery	Economic Benefits & Value Chain	Local Pride – I am Salone	Tourism Experiences & Destinations

Campaign audiences include:

- Parliamentarians, Ministries, traditional leaders
- Local communities in tourism areas
- Domestic families (Including Expats)
- Tourism value chain stakeholders
- Corporates not in tourism value chain
- School and university students
- Youth and other clubs and organizations –

Since the core goals of domestic travel stimulation and domestic tourism awareness raising, the campaign will be run under the banner of “Tourism is Everybody's Business”.

The following campaign slogan will be used:

Torizm Na All Man Bizness

Sub line: Sierraously Surprising (to be used as and when appropriate)

A campaign mascot will be produced, to be used on all visual materials and promotions

The “Torizm Na All Man Bizness” campaign will be executed across Paid, Earned, Social and Owned platforms, with the mutual goals of creating awareness of the benefits of tourism to local communities and the national economy, as well as the variety of tourism experiences on offer for selected domestic market segments.

In preparing for the campaign NTB will produce the following supportive materials and content:

- Industry Special Offers travel packages, which can be incorporated on printed and electronic materials owned by the NTB and private sector tourism stakeholders and promoted through social media, websites and media
- Pop-up stands for promotions, deployed to government offices, embassies, events and large corporates to promote the travel packages
- Print collateral, including a campaign flyer for distribution and outdoor billboards
- Campaign promotional wear and special children's giveaways
- Digital media including "*Torizm Na All Man Bizness*" domestic tourism website landing page, Facebook and Instagram accounts
- Radio and television advertisements and editorial materials

Elements and actions

Element	Actions
Phase 1: Campaign launch	
Planning and preparation	<ul style="list-style-type: none"> • Campaign concept and implementation plan: Formulate and approve a campaign implementation plan and budget
	<ul style="list-style-type: none"> • Outsourced services: Formulate TORs and RFP, invite tenders, evaluate and appoint service providers for outsourced campaign elements
	<ul style="list-style-type: none"> • Special offers deals: Arrange a meeting in Freetown of private sector to explain concept and solicit participation; venue and refreshments (including hall hiring, AV equipment, refreshments, meals). Create database of special offers and publish on website and in flyer (see below)
Campaign collateral production	<ul style="list-style-type: none"> • Campaign identity and mascot: Appoint agency to prepare examples of campaign logos and mascot and select a final
	<ul style="list-style-type: none"> • Pop-up stands: Design, manufacture and deliver mobile pop-up stand carrying campaign logo, messages and pictures including cut out of campaign mascot for photo posing
	<ul style="list-style-type: none"> • Campaign jingle: Copywrite, compose, produce and record campaign song (in 4 major dialects)
	<ul style="list-style-type: none"> • Campaign audio messages: Production and recording of five, 30-45 second radio messages in 3 languages to communicate campaign messages
	<ul style="list-style-type: none"> • Website: Develop and integrate a campaign landing page on NTB website, including provision for campaign messages, visual and audio collateral, special offers lists and content writing for approval

Element	Actions
Campaign collateral production (cont.)	<ul style="list-style-type: none"> • Videos: Produce a five-minute destination video and broken into 4 vignettes (1 minute each) to showcase the regions Plan, using existing video footage
	<ul style="list-style-type: none"> • Social media platforms: Establish Facebook and Instagram campaign pages with relevant hashtags and campaign designs and identity incorporated and populate with launch images and text
	<ul style="list-style-type: none"> • Promotional leaflet: Design and produce a 2-page campaign flyer, incorporating campaign identity and offers for approval (Krio & English only)
	<ul style="list-style-type: none"> • Billboards: Design, produce and erect five giant billboards incorporating campaign identity at key tourism points
	<ul style="list-style-type: none"> • Campaign wear and giveaways: Design and produce T-Shirts, Caps and Pencils/rulers as campaign wear and giveaways
Campaign implementation	<ul style="list-style-type: none"> • Campaign support: Appoint a suitable PR agency on a monthly retainer to work with NTB in rolling out the campaign tactics and maximize PR around campaign
	<ul style="list-style-type: none"> • Editorial print, radio and TV coverage: Leverage printed media editorial opportunities and arrange weekly radio and TV program discussions, Minister, GM, PS, staff and private sector stakeholders on 3 radio stations
	<ul style="list-style-type: none"> • Radio promotions: Flight radio messages with jingles on selected radio stations
	<ul style="list-style-type: none"> • Outdoor billboards: Print, erect, display and remove billboards
	<ul style="list-style-type: none"> • Social media contents: Formulate social media campaign plan and messaging strategy and post campaign messages alternating on Facebook and Instagram, and social media engagement
	<ul style="list-style-type: none"> • Social media competitions: Publicize 2 competitions a) Name the Mascot and b) Best tourism picture posting on Facebook and Instagram with Hashtag #Torizm4allman and award weekly prizes
	<ul style="list-style-type: none"> • Schools Tourism competition : Formulate competition structure and rules, invite entries through Department Education, select participating schools, receive and accept entries, evaluate and award prizes to top 5 winning entries
	<ul style="list-style-type: none"> • Community-based « best tourism village » competition: Formulate competition structure and rules, communicate campaign messages and explain competition to chiefs and headmen of tourism-interested villages, receive and evaluate entries, award prizes to top 5 winning entries
	<ul style="list-style-type: none"> • Pop-up stand promotions : Appoint youth ambassadors to staff pop-up stands and arrange weekly pop-up exhibits at key government, corporate offices and special events to promote special offers and awareness messages

Element	Actions
	<ul style="list-style-type: none"> • Annual President's Tourism Awards: Appoint Awards organizing team and judging panel, formulate and agree format, entry and evaluation process, invite and receive nominations, evaluate and announce winners at annual awards ceremony
Phase 2: Campaign review and renewal	
Planning and preparation	<ul style="list-style-type: none"> • Campaign concept and implementation plan: Assess the results achieved in Phase and adapt the campaign concept, theme, target audiences, messages and implementation plan for Phase 2 accordingly
	<ul style="list-style-type: none"> • Outsourced services: Assess outsourced services and service providers and adjust and adapt for Phase 2 accordingly
	<ul style="list-style-type: none"> • Private sector involvement: Expand industry involvement, sponsorships and special offers in accordance with Phase 2 concept and implementation plan
Campaign collateral production	<ul style="list-style-type: none"> • Review and revise campaign collateral: Based on the revised campaign concept, review campaign collateral and revised where appropriate, necessary and affordable
Campaign implementation	<ul style="list-style-type: none"> • Campaign support: Review performance of campaign outsourced support agencies in Phase 1, revise terms and appoint new outsourced campaign executing partners where necessary
	<ul style="list-style-type: none"> • Campaign media mix: Review performance and results of editorial coverage, radio advertising, outdoor advertising, social media communication and competitions and pop-up stand promotions and adapt media mix to suit the campaign plan
	<ul style="list-style-type: none"> • Competitions and awards: Review performance and results of schools competition, village tourism competition and Annual Tourism Awards and adapt to suit the campaign plan
	<ul style="list-style-type: none"> • Annual President's Tourism Awards: Appoint Awards organizing team and judging panel, formulate and agree format, entry and evaluation process, invite and receive nominations, evaluate and announce winners at annual awards ceremony

Strategy 1.3: Implement #ExploreFreedom, a coordinated and integrated international brand and image promotion campaign


Concept

The concept involves rolling out the ‘Explore Freedom’ brand through a multi-year, multi-channel international promotional campaign, using #ExploreFreedom as an umbrella call to action and a communication theme for all tourism promotion activities.

Key overriding campaign messages, to be included in communications and promotions are:

- Sierra Leone welcomes all visitors with open arms and warm smiles.
- Travelling in Sierra Leone is safe, the country is stable and the tourism industry takes special care of visitors.
- The local people are keen to receive and host visitors from all over the world with a special brand of hospitality.
- The country is largely unexplored by tourism and offers visitors a rich and rewarding natural and cultural experience

Campaign target market-specific messages

					
Explorers	Outdoor adventure and eco enthusiasts			SAVE – Scientific, Academic, Volunteer, Educational	
Intrepid and Mature Explorers	Hikers	Birders	Sport Fishing Enthusiasts	Volunteers and exchange students	Diaspora
UK, Germany and USA	Europe	UK, Germany and USA	Global	UK, Germany and USA	USA
Messages: <ul style="list-style-type: none"> • Explore untouched Afro-Guinea rainforests • Unique cultural traditions and opportunities for interaction • Unique botanical and wildlife habitats such as primates, pygmy hippo, tropical bird species, etc. • Many potential nature-based activities such as forest exploration, wildlife safaris, trekking and hiking • The best, uncrowded and remote powdery white beaches in West Africa to complement ecotourism • Be the first to explore this largely undiscovered destination 	Messages: <ul style="list-style-type: none"> • Hike the highest mountain in West Africa • Sierra Leone has many opportunities for wild hiking • Forest hiking allows for seeing unique species • Various unique mountain areas with cultural experiences 	Messages: <ul style="list-style-type: none"> • 583 bird species, many endemic to the Upper Guinea rain-forest • Varied habitats from coast to rainforest - rewarding and diverse bird-watching experience • Many other complementary nature-based activities such as trekking and hiking 	Messages: <ul style="list-style-type: none"> • Sierra Leone's a sport fisherman's paradise and a hidden gem • Opportunities for catching record-sized tarpon and other species • Remote and uncrowded fishing spots • Professional and knowledgeable operators • Safe and well-maintained boats and modern equipment 	Messages: <ul style="list-style-type: none"> • You can make a difference • Many opportunities to <ul style="list-style-type: none"> ○ learn ○ teach ○ volunteer • Rich natural ecosystem to study • Dynamic local population • Openness and hospitality 	Messages: <ul style="list-style-type: none"> • Discover your roots • Salone is one of the key points from where people left Africa as slaves • At the same time Salone is a beacon of hope and freedom from slavery • GoSL welcomes you with open arms to trace your ancestry and historical ties

Elements and actions

Element	Actions
Phase 1: Focus on awareness in Core source markets and segments	
<i>NOTE: Appendix 1 provides a profile of targeted source markets and segments, as well as a detailed list of potential tour operators, social media groups, associations and media contacts for NTB to use in executing the elements and activities listed below</i>	
Campaign coordination and management	<ul style="list-style-type: none"> • Campaign planning and coordination: NTB to work with a selected task team of public and private sector representatives in drafting a detailed campaign plan and coordinating execution of all activities in plan • Campaign execution: NTB to appoint a suitable marketing/PR agency(s) to work with the NTB team for coordinating the execution of the campaign as outlined below. Such appointments may best be done a) at global level for servicing activities that cut across various source markets and b) at source market level in core markets such as the UK, USA and Europe, for market-specific activities. Mandate to include: <ul style="list-style-type: none"> ○ Research, advise and identify suitable promotional partners, channels and opportunities ○ Finalize agreements with promotional partners and media channels ○ Write and promote destination-owned contents and copy ○ Coordinate all arrangements associated with familiarization visits, media trips, online advertising, participation in travel shows and other activities
International travel trade marketing	<ul style="list-style-type: none"> • Due diligence and trade research: Contact targeted tour operators in strategic source markets that specialize in travel arrangements for targeted segments and provide them with information to assess their interest, abilities, procedures and requirements for conducting joint travel promotions in support of the campaign • Joint marketing agreements: Conclude Joint Marketing Agreements (JMAs) with selected international operators for promoting Sierra Leone to their clientele. Such JMAs could include: <ul style="list-style-type: none"> ○ Special focus on Sierra Leone on operator websites, on social media channels and in communication with traveler databases ○ Special deal promotions to traveler databases of priced packaged travel opportunities to Sierra Leone ○ In store window displays and other advertising ○ Webinars with travel clients set up by trade partners to promote Sierra Leone • Trade partner capacity building: Conduct various interactions to empower selected international operators with information to get them acquainted with Sierra Leone, including: <ul style="list-style-type: none"> ○ Online discussions and information exchanges ○ Agent familiarization (FAM) tours with carefully selected high quality international tour operators in key target markets ○ Online interactions between local Sierra Leone hospitality and tour operators and international tour operators, with a view to develop travel offers and packages that could appeal to their markets • Trade fair participation: Promote brand Sierra Leone at: <ul style="list-style-type: none"> ○ ITB Berlin, covering the European and other global markets

Element	Actions
International travel trade marketing (cont.)	<ul style="list-style-type: none"> ○ WTM London, covering UK, Europe and other global markets ○ A selected trade fair in the USA, with specific focus on the diaspora market e.g. in Atlanta or southern coast states ○ Should funds allow attendance of Top Resa (France) and/or FITUR (Spain) could be considered <p>Should COVID-19 or other events prevent travel, participation in virtual trade fairs is recommended</p> <p>NOTE: It is highly recommended that NTB should be accompanied by at least five private Sierra Leone tourism operators when engaging in trade fairs or trade roadshows. While NTB news coverage at such events may raise some level trade awareness, new international travel trade contacts would require one-on-one engagement with local operators before</p>
	<ul style="list-style-type: none"> • Trade roadshows: Arrange a roadshow in at least one core source market per annum, starting with the UK. Roadshow would entail a core team of Sierra Leone tourism stakeholders (e.g. MoCTA, NTB, and at least four to five private sector operators) visiting key cities in source countries to have face-to-face meetings with interested international tour operators and the travel agency networks, to promote brand Sierra Leone and to set up specific offers and sales initiatives in such markets. <p>Should COVID-19 or other events prevent travel, roadshows could be organized virtually</p>
Website traffic generation	<ul style="list-style-type: none"> • Search Engine Optimization: SEO through appropriate meta-tagging and other technical SEO method and building internal and external links
	<ul style="list-style-type: none"> • PPC Advertising: Produce various advertising variants and promote to target segments in core markets, through Pay-per-Click advertising to drive traffic to the NTB Website, with the aim of attaining travel conversion through local operators
Social Media Marketing	<ul style="list-style-type: none"> • Content calendar: Develop and implement a detailed social media communication plan and content calendar including messages, images, frequency of posting, links to website and other platforms, etc.
	<ul style="list-style-type: none"> • Social media posts: Based on the social media plan, make regular posting of unique and visually attractive copy, images and videos and reels that showcase Sierra Leone's top attractions and human interest stories on NTB's social media platforms, including Facebook, Twitter, Instagram, Pinterest, YouTube
	<ul style="list-style-type: none"> • Social media advertising: Conduct advertising on Facebook and Instagram targeted at selected market segments and source markets to a) boost post awareness and b) increase following on social media platforms
Digital content marketing	<ul style="list-style-type: none"> • NTB Blog Management: Create and publish SEO optimized blog posts for the Sierra Leone website with strong page interlinkages to other pages on the website.
	<ul style="list-style-type: none"> • Newsletter Management: Compile newsworthy stories and publish and distribute a quarterly newsletter to the stakeholder database
	<ul style="list-style-type: none"> • Advertorial: Commission regular articles to be written and published on popular online travel publications & content portals

Element	Actions
Digital content marketing (cont.)	<ul style="list-style-type: none"> • Content Seeding: Commission repurposing of blog posts and articles and publish on Wiki Travel along with appropriate images and website links
Influencer marketing	<ul style="list-style-type: none"> • Influencer familiarization trips: Arrange FAM trips for bloggers to generate and promote daily social media coverage during the trip on Instagram, Instagram Stories, Twitter and Facebook • Influencer-produced video content: As part of Fam trips, influencers to produce short (60 sec.) duration that are suitable for generating engagement on YouTube, Instagram and Facebook
Special interest association partnerships	<ul style="list-style-type: none"> • Special interest partnership agreements: Contact targeted organizations, provide them with website and brochure information, assess their interest, abilities, procedures and requirements for conducting joint travel promotions and conclude joint marketing agreements with suitable partners • Sierra Leone special interest offers: Identify Sierra Leone tourism operators who are interested and equipped, to develop travel offers to suit association requirements (including airlines, local tour and accommodation operators, experience providers and other relevant parties) • Special interest promotions: In partnership with associations, promote special interest offers to association members and affinity groups
Media and PR coverage	<ul style="list-style-type: none"> • Editorial coverage: Identify and evaluate potential journalists/writers in key source markets, for compiling contributions on Sierra Leone and work with targeted publications and contributors to produce high-quality Sierra Leone editorial content for publication in targeted publications and sites • Media familiarization: Conduct media visits for carefully selected journalists, based on their interest in and knowledge of West African travel and the targeted market segments
Partnerships with Diplomatic Corps	<ul style="list-style-type: none"> • Capacity building: In collaboration with Ministry of Foreign Affairs, conduct online seminar(s) with relevant staff of diplomatic missions to communicate and empower them and brainstorm with them regarding: <ul style="list-style-type: none"> ○ The brand strategy, brand identity, brand manual and brand communication ○ The marketing strategy and execution ○ Opportunities for their support in communicating the brand ○ Opportunities for their support in rolling out the brand and marketing campaigns • Office dressing: Provide missions with branded posters to showcase the iconic sites of Sierra Leone, for them to have them mounted in visa offices and other locations where the public can see them • Regular communication: Communicate on a monthly basis with diplomatic missions abroad regarding campaign progress, new products and other newsworthy events of relevance, which can be communicated in their host countries

Element	Actions
Market research and monitoring	<ul style="list-style-type: none"> • Performance tracking: Track the results of the various initiatives and estimate return on investment (ROI) in media and trade value, including: <ul style="list-style-type: none"> ○ social media following and conversion to website following posts and influencer engagements ○ conversion to website following digital advertising ○ media value generated through media Fam trips ○ travel trade value generated through tour operator engagements
	<ul style="list-style-type: none"> • Media monitoring: Monitor and moderate market response in foreign media and on various social media platforms and respond effectively to all reactions and queries and adapt accordingly
	<ul style="list-style-type: none"> • Campaign research: Conduct research among trade, influencer and media partners to assess the campaign tactics and impact and adapt campaign mix accordingly

Phase 2: Focus on conversion in Core source and awareness raising in new growth markets and segments

Campaign coordination and management	<ul style="list-style-type: none"> • Campaign theme and tactics: Assess the campaign theme and the tactical mix of activities and adapt in accordance with findings and available budget
	<ul style="list-style-type: none"> • Representation: Assess campaign performance in various markets and adapt outsourced representation accordingly
International travel trade marketing	<ul style="list-style-type: none"> • Due diligence and trade research: Expand knowledge and database to include trade partners in new markets and segments and assess their interest and potential participation
	<ul style="list-style-type: none"> • Joint marketing agreements: Conclude Joint Marketing Agreements (JMAs) partners in new markets and segments
	<ul style="list-style-type: none"> • Trade partner capacity building: Conduct various interactions to empower selected international operators in new markets and segments with information to get them acquainted with Sierra Leone
	<ul style="list-style-type: none"> • Establish an online trade education and affiliation program : Set up a knowledge test system on the website where trade partners can log in, obtain all trade knowledge of Sierra Leone and affiliate as trade partners
	<ul style="list-style-type: none"> • Trade fair participation: It is unclear what the status of major trade fairs will be in 2026/27, given the move towards virtual trade engagements. Assess trade fair participation, ROI and value of participation and adapt accordingly <p><i>NOTE: It is expected that the number of tourism operators in Sierra Leone with an international footprint will have increased substantially in Phase 1 and that NTB should be accompanied by a substantial number of private Sierra Leone tourism operators when engaging in trade fairs or trade roadshows.</i></p>
	<ul style="list-style-type: none"> • Trade roadshows: Conduct suitable trade roadshows in new source markets and segments

Element	Actions
Website traffic generation	<ul style="list-style-type: none"> • Search Engine Optimization: Continue improving SEO through appropriate meta-tagging and other technical SEO method and building internal and external links
	<ul style="list-style-type: none"> • PPC Advertising in core markets: Produce various advertising variants and expand reach to Investment source markets and segments, through Pay-per-Click advertising to drive traffic to the NTB Website, with the aim of attaining travel conversion
	<ul style="list-style-type: none"> • Targeted native advertising in USA market: Place experiential digital destination advertisements in suitable, high volume mainstream publication in specific locations the US for high visibility among the key market segments, to drive traffic to the NTB Website, with the aim of attaining travel conversion through local operators
Social Media Marketing	<ul style="list-style-type: none"> • Content calendar: Expand content planning to include a focus on new market segments
	<ul style="list-style-type: none"> • Social media posts: Based on the social media plan, expand frequency of regular posting of unique and visually attractive copy, images and videos and reels that showcase Sierra Leone's top attractions and human interest stories on NTB's social media platforms, including Facebook, Twitter, Instagram, Pinterest, YouTube
	<ul style="list-style-type: none"> • Social media advertising: Conduct advertising on Facebook and Instagram targeted at selected new market segments and source markets to a) boost post awareness and b) increase following on social media platforms
Digital content marketing	<ul style="list-style-type: none"> • NTB Blog Management: Create and publish SEO optimized blog posts for the Sierra Leone website with strong page interlinkages to other pages on the website. Focus specifically on new source markets and segments
	<ul style="list-style-type: none"> • Newsletter Management: Compile newsworthy stories and publish and distribute a quarterly newsletter to the stakeholder database, including new market segments and source markets
	<ul style="list-style-type: none"> • Post Syndication: Commission regular blog posts from seasoned digital writers and influencers on key topics in Sierra Leone that would appeal to targeted markets
	<ul style="list-style-type: none"> • Advertorial: Expand commission articles to include new markets and segments
	<ul style="list-style-type: none"> • Content Seeding and Partnerships: Expand third party partnerships to include marketing agreements with Online Travel Agencies (OTAs) such as Expedia, Booking.com, Airbnb and others
	<ul style="list-style-type: none"> • Webinars for trade and media: Set up StreamYard online broadcast platform for NTB and integrate the feed with NTB's YouTube channel. This broadcast would be used to interview relevant stakeholders and domain expert
Influencer marketing	<ul style="list-style-type: none"> • Influencer familiarization trips: Arrange FAM trips for bloggers with focus on new markets and segments

Element	Actions
Influencer marketing (cont.)	<ul style="list-style-type: none"> • Influencer-produced video content: As part of Fam trips, influencers to produce video contents for generating engagement on YouTube, Instagram and Facebook to expose new products to new markets and segments • Social Media Shout-Out: Commission Instagram posts highlighting key attractions in Sierra Leone from popular travel and lifestyle influencers
Special interest association partnerships	<ul style="list-style-type: none"> • Special interest partnership agreements: Expand partnerships to include more special interest segments e.g. surfing and other watersports, long distance swimming, extreme running and cycling, photography, etc. • Sierra Leone special interest offers: Identify and equip Sierra Leone tourism operators to develop travel offers to suit association requirements • Special interest promotions: In partnership with associations, promote special interest offers to association members and affinity groups • Quality assurance: Monitor local travel trade delivery quality and efficiency in association with partners and address gaps and shortcomings
Media and PR coverage	<ul style="list-style-type: none"> • Editorial coverage: Identify and evaluate potential journalists/writers in current and new source markets, to produce high-quality Sierra Leone editorial content for publication in targeted publications and sites • Media familiarization: Conduct media visits for carefully selected journalists, with focus on both current and new source markets and segments
Partnerships with Diplomatic Corp	<ul style="list-style-type: none"> • Capacity building: In collaboration with Ministry of Foreign Affairs, conduct online seminar(s) with relevant staff of diplomatic missions in new source market areas, to communicate and empower them and brainstorm with them regarding tourism promotional opportunities • Office dressing: Expand exposure of branded materials to showcase the iconic sites of Sierra Leone in foreign mission offices • Regular communication: Continue regular communication with diplomatic missions abroad regarding campaign progress, new products and other newsworthy events of relevance, which can be communicated in their host countries • Marketing engagement: Solicit the support of diplomatic missions to identify additional online and partnership marketing opportunities in their host countries
Market research and monitoring	<ul style="list-style-type: none"> • Performance tracking: Continue tracking the results of the various initiatives and estimate return on investment (ROI) in media (both digital and traditional) and trade value • Media monitoring: Continue monitoring, moderating and responding to market response in foreign media and on various social media platforms • Campaign research: Expand and deepen research among trade, influencer and media partners to assess the campaign tactics and impact and adapt campaign mix accordingly

4.3.2 Thrust 2: Product development and packaging

Strategy 2.1: Package, develop and promote suitable “Explore Freedom” circuits

Concept

This concept entails development and packaging of proposed travel circuits that appeal to the target market segments, based on the main tourist sites along the coast and the inland areas. The circuits will serve as the main destination product portfolio for inclusion in destination marketing collateral and local and foreign tour operators will be encouraged to package their offers in accordance with the circuits.

The circuits will also be the basis for prioritizing product development initiatives and for capacity development along the tourism value chain in the various destinations along the circuits routes

The following circuits and sites will be prioritized for packaging and development:

Sites development and packaging	Cultural development and packaging
Circuit 1: Mountains and Villages Route <i>Route Spine: Freetown, Makeni, Kabala, Kono</i>	
Forest <ul style="list-style-type: none"> Outamba Kilimi National Park and associated wildlife Tacugama Chimpanzee Sanctuary Mountains <ul style="list-style-type: none"> Bintumani Mountain: (highest in West Africa, hiking, stories about mountain) Loma Mountains Wara Mountain (hiking, stories about mountain) Camel Back Mountain (Birwa Kingdom) Wara Wara Bafodia Hill Kangari Hills Kunsho Hills Ferengbeia Hill Wusum (husband) and Mena (wife) Hills – legends Sarkachemeh Hill Rivers, waterfalls and lakes <ul style="list-style-type: none"> Mambo Waterfall - Freetown Hydro Waterfall – Gbonguna Bankasoka Waterfall Lake Sonfon (mystical powers/landmarks) Bintumani Waterfall Binkolo Hydro Bumbuna Hydro Waterfalls Maroto Waterfalls Roland beach Manungor Beach Heritage <ul style="list-style-type: none"> Grave of Bai Bureh – Hut Tax War – Kasseh Village Grave of Foday Sankoh at Robenlay British War Graves at Kasseh Village 	Agriculture & Industry <ul style="list-style-type: none"> Agritourism and Bully Lands in Bombali Rice (Wala Rice) – more than any other regions Palm Wine (Omolay) Gbindi for cattle rearing Tourism industrial mining & Pepel Port Senekedugu Agricultural Village – Kabala Cow Ranches – Koinadugu District diamond mines areas in Kono & environs (alluvial/artisanal and Kimberlite mining) Arts <ul style="list-style-type: none"> Bubu, Mada, Kondi (Traditional instrument, dance and music). Gara tie dying. Ronko & Lankonoh Cloth. Rafia Bags Weaving Culture <ul style="list-style-type: none"> Village tourism e.g. Rogbonkoh The Tamaboro Fighters Gbangbani -, Matorma -, Poro -, Ojeh -, Bundo Secret Societies Bolobineh – Devil Port Loko Celebration annually Town celebrations annually in various towns Centre of Sierra Leone - Yele

Sites development and packaging	Cultural development and packaging
Circuit 2: Rainforest and Culture Route <i>Route Spine: Freetown, Bo, Kenema, Kailahun</i>	
<p>Forests and nature</p> <ul style="list-style-type: none"> • Tacugama Chimpanzee Sanctuary • The Gola Rain Forest (National Park) pygmy hippo and other animals • Tiwai Island - Different species of fauna and flora • Gola Malimbe, Picathartes and other bird species <p>Mountains</p> <ul style="list-style-type: none"> • The Kangari Hill Reserve • Mokañji Hills – Rutile; Kunor Hills at Mongere (Kpowabu Village) • Candy Mountain • Kambui Hills – hiking • Mamba Hills – Kailahun • Tingi Hills (2nd highest mountain) <p>Rivers and lakes</p> <ul style="list-style-type: none"> • Rivers and streams Sowa, Jong, Wanjei, Moa, etc. • Congor Waterfalls (3rd highest falls) • Guma Dam • Inland beaches: Miami Beach, Kailondo Beach, Makona Beach, Aqua Beach Tongo <p>Heritage</p> <ul style="list-style-type: none"> • Tiwai Island and 8 host communities • The Caulker’s Shrine at Bumpeh – Ribbi Chiefdom • Tombs of great warriors • The mass grave in Tihun Sogbini – hundreds of people buried • Heritage writing (first Mende alphabet by Kisimi Kama in the Pujehun District) • The great Bo School – est. 1906 • MRU Bridge – Gendema – Border Crossing Point • Georgian style buildings • Statues of Salia Koroma (accordion player) • Five-finger print on a stone: Malegoth • War monuments • Kailahun Court Barrie – Kailahun 	<p>Agriculture and industry</p> <ul style="list-style-type: none"> • Palm Oil Plantations - Socfin Pujehun • Agriculture: Turmabum bully lands • Rice Farm • Sierra Tropical • Samalane • Industrial Tourism : Mining sites, Gold and diamond mines • Cocoa and coffee: 1920 origins (Chocolate consumed in England) <p>Arts</p> <ul style="list-style-type: none"> • Arts and Crafts Centre • Dying, weaving, carving • Gara Tie Dying Centre • Traditional Musicians e.g. Amie Kallon • Indigenous artists renowned all over the country <p>Culture</p> <ul style="list-style-type: none"> • Cultural Foods: <ul style="list-style-type: none"> ○ Pemahun (rice & potato leaves steamed) Typically southern region ○ Cassada (cassava) and burnt fish – staple food for riverine areas ○ Peila ○ Bo Gari ○ Lafidi (rice, palm oil, okra) • Cultural Groups <ul style="list-style-type: none"> ○ Kposowai Dance group ○ Alema dancers – Pujehun ○ Hassan Jallah • Alhaji Tokowa – The famous cannibal • Cultural legends / Heroes and heroine gravesites, e.g. Madam Ella Kablo Gulama, Sengbei Pich, etc • Clothes locally made in region) -Condi Glei • Mascarades: Jawe Mask, Fobu-Landa

Sites development and packaging	Cultural development and packaging
Circuit 3: Oceans, Islands and Beaches Route <i>Route spine: Freetown, Moyamba, Bonthe</i>	
Beaches and islands <ul style="list-style-type: none"> • Freetown Peninsula beaches (see Freedom Route) • Banana Islands • Turtle Island • Bonthe Island • Turner's Peninsula • Sulima Beach • Mahera Beach • Tobanda Beach Heritage <ul style="list-style-type: none"> • Madam Yoko's gravesite: the first female PC (paramount chief) – Moyamba • The Caulker's Shrine at Bumpeh – Ribbi Chiefdom (Moyamba District) • Bumpeh River Cruise Mangrove Swamps – Rotifunk Ribbi Chiefdom (Moyamba District) 	Watersport <ul style="list-style-type: none"> • Scuba Diving at Bonthe • Sport fishing • Surfing Culture <ul style="list-style-type: none"> • Fishing villages and fishing culture
Circuit 4: Freedom Route <i>Freetown, Western Peninsula and Bunce Island</i>	
Beaches and islands <ul style="list-style-type: none"> • Lumley beach • Tokeh beach • Sussex beach • Bureh beach • Levuma beach • River 1 & 2 beaches • Banana Islands • Tasso Island Heritage <ul style="list-style-type: none"> • Tacugama Chimpanzee Sanctuary • Bunce Island • Gateway to old King's Yard • Fort Thornton • Lakah wetlands • Leicester peak • Wanpole market • Freetown cotton tree • Freedom churches • National Museum • Railway Museum 	Culture <ul style="list-style-type: none"> • Freetown nightlife • City market • York and other fishing village

Elements and actions

Element	Actions
Phase 1: Scope, develop and promote main circuits	
<i>NOTE: Appendix 4 provides the results of regional workshops conducted, where regional stakeholders identified key attractions and experiences</i>	
Circuit Planning	<ul style="list-style-type: none"> Conceptualizing: The #Explore Freedom circuit identification and mapping will be conducted in partnership with the private sector and regional stakeholder. The core of the #Explore Freedom Circuits will be the four circuits highlighted above, including the main historical, cultural and environmental sites It is envisaged that each region will eventually identify a number of sub-circuits to contribute to these main circuits. The sub-circuits could be general touring routes or could appeal to specific interest groups. Importantly, sub-routes should not be constrained by regional boundaries and regional stakeholders will collaborate when routes cross regional boundaries Circuit forums: Circuit forums will be set up for each of the identified routes to coordinate activities of various role players involved in the development and promotion of the various routes. The forums will be led by NTB staff and will be comprised of the relevant regional authorities (as main champions), selected community representatives and interested and affected private stakeholders. Each route should have a 'route champion' who will chair the route forum and be the main liaison channel with the NTB Inventory and auditing: An inventory will be made of attractions, experiences, facilities and services on each route and these will be evaluated in terms of facilities quality, safety, human resources capacity, etc. A plan of action will be drafted for enhancement of experiences and facilities on the various routes
Circuit mapping and promotion	<ul style="list-style-type: none"> Mapping: The circuits will be mapped out in detail on suitable mapping/GIS software, with waypoints and coordinates of all attractions, activities, facilities and experiences recorded and a database compiled of the standard and readiness of attractions and experiences to receive visitors Digitalization: Circuits will also be mapped on the destination website using interactive mapping functionality (e.g. www.namibiatourism.com; www.openafrica.org) and possibly on a printed #Explore Freedom Routes Map, highlighting the experiences, facilities, services and activities available on each route. Printed route maps will also be downloadable from the NTB website Promotion: The routes will be promoted through the #Explore Freedom promotional campaign, including through travel trade and media familiarization visits and through all elements of the digital promotion strategy
Circuit development and improvement based on circuit audits	<ul style="list-style-type: none"> "Hardware" improvements: physical works to improve tourism areas and experiences, such as access routes, parking, trails (for vehicles, pedestrians, bikes, etc.), tourist signage, observation platforms, safety railings, rest and shade areas, signposting, etc.

Element	Actions
Circuit development and improvement based on circuit audits (cont.)	<ul style="list-style-type: none"> • “Software” improvements: improving, training and putting in place organizational structures, cultural services (performers, hosts, etc.), interpretive guiding, porters, etc. that can change a place into a package of experiences. This often requires engagement and stakeholder collaboration rather than capital investment, however the positive impacts can be significant
	<ul style="list-style-type: none"> • Maximizing market ready products: packaging and branding attractions and experiences so that a value can be attached to them and they can be promoted commercially

Phase 2: Expand the network to include local sub-routes

During this phase, the circuit network will be expanded through development of sub-circuits or extensions of the main circuits. As local communities develop additional experiences and access routes improve, thematic or geographic additions could be made to the main circuits.

Such sub- circuits could:

- Vary in duration (e.g. from an hour to a few days)
- Be walking/hiking/biking trails or vehicular travel routes/loops
- Could be thematic or geographic or both, e.g. the Outamba-Kilimi Hippo Hiking trail; the Kambui Hills Cultural Hiking trail; the bullylands route, etc.

The same steps as in Step 1 should be followed:

- Route planning
- Route mapping and promotion
- Route development and improvement

Strategy 2.2: Package and promote suitable hospitality investment opportunities

Concept

Development and improvement of the hospitality offer (hotels and catering) is a major key to unlocking Sierra Leone’s tourism potential. While hospitality facilities in Freetown have improved significantly during recent years, the quality, variety, service standards and value for money in the city could be improved significantly.

Outside of Freetown hospitality facilities and services are very limited and mostly of limited standards and quality. Tour operators will remain cautious of promoting the country until the range and quality of facilities and services have improved.

A concerted strategy is required for promoting and securing additional investment in the hospitality sector in particular

Elements and actions

Element	Actions
Phase 1: Accommodation improvement and expansion in prime tourism areas aimed the Explorer, Outdoor Adventure and Sport Enthusiasts and SAVE market segments	
Investment planning	<ul style="list-style-type: none"> • Destination master plan: A holistic planning study should be undertaken to formulate an overall 20-year tourism strategy including a spatial plan with priority tourism development areas, guidelines for sustainable tourism development, investment and business development support framework and incentives, human resources development plan, tourism regulatory framework and other elements of importance for balanced and sustainable tourism development <p>Such a master plan should build on the positioning and target market strategy that has been defined in this marketing and branding strategy</p>
	<ul style="list-style-type: none"> • Potential investment portfolio: Based on the master plan, a portfolio of potential investment sites and opportunities will be identified, by applying an agreed list of selection criteria, including accessibility, security of tenure and other factors
	<ul style="list-style-type: none"> • Pre-feasibility studies: The long-list portfolio of investment opportunities will be subjected to more outline feasibility studies as a basis for final selection of investment-ready portfolio of opportunities. Factors to consider would include an analysis and projections of market demand, site physical suitability, land ownership and tenure conditions, infrastructure and services availability, available contracting skills and services, etc.
	<ul style="list-style-type: none"> • Investment conditions: Clarify, stipulate and formalize internally investment conditions pertaining to the investment opportunities, including foreign and local ownership, land tenure/concession stipulations, investment guidelines, EIA guidelines, incentives, etc.
Investment packaging and promotion	<ul style="list-style-type: none"> • Investment profiles and prospectus: Draft and design investment profiles for promotion purposes, including background to the country, rationale for investing in tourism, description and imagery of investment opportunities and transparent outline of the investment application and evaluation process, both for solicited and unsolicited proposals
	<ul style="list-style-type: none"> • Investment promotion plan: Draft promotion plan including target audiences, promotional media, trade engagement opportunities and phase the plan in accordance with the investment process and realities
	<ul style="list-style-type: none"> • Investment promotion execution: Launch high-profile investment drive and execute the marketing mix as planned, through focused and targeted invitations, B2B engagements, digital media and other marketing channels
Investment proposal evaluation and award	<ul style="list-style-type: none"> • Receive and evaluate proposals: Conduct due diligence of investment proposals received, including financial standing, credibility and track record of potential investors, alignment of proposals with investment vision, financing proposals and feasibility, environmental considerations, etc. Where more than one proposal are received, score the proposals based on a suitable set of criteria pertaining to the key investment feasibility factors
	<ul style="list-style-type: none"> • Negotiations, award and contracting: Conduct negotiations with the preferred investor and agree all aspects of the investment agreements and contracting

Element	Actions
	<ul style="list-style-type: none"> • Monitoring: Set in place a clear process of monitoring investment progress, challenges, delivery and performance and facilitate where required

Phase 2: Expand to additional sites, aimed at luxury and beach holiday segments

During this phase, based on the lessons learnt during phase 1, investment promotion could be expanded to include sites and areas not included in Phase 1 and targeted at additional market segments.

The same steps as in Step 1 should be followed:

- Investment planning
- Investment packaging and promotion
- Investment proposal evaluation and award

Strategy 2.3: Launch a suitable tourism flagship events program

Concept

The “Explore Freedom” brand promise could be substantially strengthened through staging of suitable cultural and/or sport flagship events. While current local events and festivals in Sierra Leone will remain important, especially for community cohesion and domestic tourism, they should be largely self-sufficient and their challenges are of a management rather than a marketing nature.

It is recommended that a flagship events program be established and that NTB should focus of supporting a series of cultural and/or sport events that have the potential to generate measurable and impactful:

- Domestic and international tourism participation and expenditure
- Tourism growth potential
- News and media exposure for the destination

As a catalyst for a flagship events program it is proposed that a Sierra Leone International Freedom Festival (SLIFF) be launched and staged during Phase 1 of the marketing implementation program. The SLIFF could, for example, stage various themes events to celebrate the slogan “Explore Freedom”, e.g.:

- Explore Roots – festival of Sierra Leone music, poetry, art and other links with the Sierra Leonian diaspora
- Explore Rainforest – ecotourism celebration in national parks with specialist guided birding, primate viewing, etc.
- Explore Oceans – marine tourism initiative including e.g. sport fishing, surfing/paddle boarding, open ocean swimming, etc.

Elements and actions

Element	Actions
Phase 1: Set up events program and launch the International Freedom Festival as anchor event	
Events support program set-up	<ul style="list-style-type: none"> • Program development: NTB to provide event organizers who arrange innovative events with in-kind support, such as endorsement for sponsorships, permission to use the destination branding, public relations and media coverage and advice regarding local conditions that may affect the event. As the program develops NTB may be in a position to provide brand-friendly events a 'flagship' status and some financial assistance. Priority will be given to events that have the potential to grow as flagship events with national and international status and that: • Calendar of events: NTB will produce and update a calendar of all events taking place throughout the year. This calendar will be part of the Sierra Leone Tourism website and will be communicated through media releases, the destination blog, social media and other promotional channels
Staging the International Freedom Festival as start-up anchor event	<ul style="list-style-type: none"> • Conceptualize Festival: NTB to arrange a founding stakeholder meeting to: <ul style="list-style-type: none"> ○ Appoint an event steering committee ○ Brainstorm and conceptualize the event strategy, including: <ul style="list-style-type: none"> ▪ Objectives ▪ Location ▪ Name and branding ▪ Elements ▪ Target audiences ▪ Business model and financing ▪ Partners ▪ Operational management and governance ○ Agree next steps • Feasibility study: Appoint a service provider to conduct a feasibility study including: <ul style="list-style-type: none"> ○ Business plan and budget ○ Financial viability and returns ○ Seed funding and sponsorships required ○ Action Plan ○ Draft a funding prospectus • Founding partners and funders: Steering committee to approach Government of Sierra Leone and other suitable event funders and organizers and reach in-principle agreement on staging the planned events including: <ul style="list-style-type: none"> ○ Approach potential funders and secure seed funding for starting the event ○ Possibly evolve Steering Committee to non-profit event company with board and advisory committee ○ Appoint event executive and make logistics arrangements

Element	Actions
Staging the International Freedom Festival as start-up anchor event (cont.)	<ul style="list-style-type: none"> • Festival organizing: Appoint a suitable professional event organizer for all event logistics, with the following actions: <ul style="list-style-type: none"> ○ Draft a TOR for an event organizer/manager ○ Put out call for proposals for event organizers/event manager to work with event company in staging event ○ Based on proposals, appoint a suitable company or person as event organizer
	<ul style="list-style-type: none"> • Festival planning and staging: The event manager and advisory committee to develop detailed event plan, including a marketing and financial management plan, including: <ul style="list-style-type: none"> ○ Secure further financial and in-kind sponsorships ○ Arrange event marketing, reservations, ticketing, etc. ○ Arrange event logistics ○ Stage event
	<ul style="list-style-type: none"> • Festival promotion: Promote the event as an integral part of the #ExploreFreedom campaign Include the event as a key “hook” in the surf promotional pilot campaign
	<ul style="list-style-type: none"> • Impact monitoring: Track event attendance and evaluate event impact and return on investment

Phase 2: Expand events portfolio

It is expected that the SLIFF will be fully functional and will have gained substantial tourism traction at the end of Phase 1. During Phase 2, the focus will be on During this phase, based on the lessons learnt during phase 1, investment promotion could be expanded to include sites and areas not included in Phase 1 and targeted at additional market segments.

The same steps as in Step 1 should be followed:

- Investment planning
- Investment packaging and promotion
- Investment proposal evaluation and award

4.3.3 Thrust 3: Effective delivery and value improvement

Strategy 3.1: Strengthen private sector tourism delivery capacity

Concept

The success of the thrusts 1 and 2 (promotion and product development) will depend on the extent to which visitor travel and expenditure occurs along the tourism value chain.

Tourists and tourism intermediaries (tour operators and travel agents) do not transact with destination tourism organizations like NTB. Conversion from destination brand and product awareness to actual travel purchases can only be fulfilled through a transaction between the potential traveler and the providers of products and services in Sierra Leone.

Such transactions can occur directly with local providers (hotels, lodges, transport operators, guides, etc.) or through intermediaries who will package experiences on behalf of providers and sell them on to end-

users (travelers). These intermediaries could include international travel agents in source markets, international tour operators in source markets, online travel agency platforms (booking.com, Airbnb and others) and inbound tour operators and ground handlers in Sierra Leone.

Given the early stages of tourism development in Sierra Leone and the various uncertainties in organizing a trip to the land of #ExploreFreedom, e.g. road access conditions, quality of hospitality operations, road and vehicle safety and other factors, it is expected that the majority of visitors will arrange their visits to Sierra Leone through a specialized international tour operator or travel agency. The research undertaken among international tour operators to inform this strategy clearly demonstrates the lack of knowledge among the international tourism trade regarding tourism products and services in Sierra Leone.

As a result the role and efficiency of local (inbound) tour operators, ground handlers and service providers in Sierra Leone is of utmost importance to the successful expansion of the tourism sector. Similarly, accommodation providers need to be equipped in dealing with the international travel trade.

Currently, very few inbound tour operators and independent accommodation providers are capable of fulfilling the requirements of the international market, especially in respect of:

- Their ability to engage with and promote their services to the international trade
- Guaranteed quality and efficiency of services offered
- Knowledge of consumer protection of international travelers and risks in this regard
- Focus on sustainability and sustainable tourism practices

It is proposed that a tourism operator development and coaching program be established to build capacity of the inbound tourism sector in Sierra Leone, possibly in partnership with a suitable International Cooperating Partner (ICP) i.e. the donor community. Organizations like Centre for the Promotion of Imports (CBI) of the Dutch Government, the International Trade Centre (ITC) and others provide such programs to developing countries and could be approached in this regard.

The program should prepare such tourism operators for effectively participating with NTB in business-to-business marketing initiatives such as roadshows, trade fairs, etc.

Depending on the nature of participants, the program could provide training and coaching services in among others, in the following topics:

- Business strategy and competitiveness
- Business operations and quality standards expected
- Market knowledge and understanding of requirements
- The tourism value chain and how it works
- Market access opportunities
- Digital marketing
- Sustainable tourism operations
- Visitor management and care
- Eco and adventure guiding and interpretation
- General health and hygiene standards
- Hospitality (accommodation and catering) standards
- Visitor information management
- Tourism statistics and research
- And other suitable topics

Elements and actions

Element	Actions
Phase 1: Institute a capacity building and mentorship program for the inbound tourism operators	
Program establishment	<ul style="list-style-type: none"> • Needs assessment: NTB to conduct a needs assessment among existing and potential tour operators and agents to determine the potential extent of the inbound travel trade community and their capacity building gaps
	<ul style="list-style-type: none"> • Program donors: Based on the needs analysis findings, engage the international donor community to establish potential partners for hosting the capacity building program
	<ul style="list-style-type: none"> • Agreement: Formalize an agreement with a suitable partner to execute the program
	<ul style="list-style-type: none"> • Participant selection: Work with the partner organization in identifying and selecting participants in the program. Screen, select and include qualifying enterprises and persons in the program database, based on their capacity and ability to participate in the program, including: <ul style="list-style-type: none"> ○ Must be part of an existing, formally operating entity or organization with full time capacity ○ Must sign an agreement to commit time and effort to the standards and requirements of the program, without direct compensation
Program execution	<ul style="list-style-type: none"> • Training: Formulate a training program and schedule and deliver formal short training sessions on an ongoing basis, covering some or all the above-mentioned topics
	<ul style="list-style-type: none"> • Mentoring and coaching: Appointed business trainers and coaches should be available on a regular basis to engage with individual operators and to guide them in their business growth and practices
	<ul style="list-style-type: none"> • Market access opportunities: Provide and facilitate market access opportunities for entrepreneurs through e.g. <ul style="list-style-type: none"> ○ Online marketing ○ Trade fair participation ○ Tour operator workshops, etc.
Program monitoring	<ul style="list-style-type: none"> • Performance monitoring: Set in place performance measurement and monitoring indicators monitoring growth in marketing engagements, customers and revenue monitored and measuring visitor numbers handled, expenditure achieved, etc.
	<ul style="list-style-type: none"> • Quality assurance: Monitor local travel trade delivery quality and efficiency in association with partners and address gaps and shortcomings
Phase 2: Expand the capacity building and mentorship program to include:	
<ul style="list-style-type: none"> • Attraction providers • Accommodation providers • Tour and activity guides • Community-based enterprises • Public sector tourism authorities and others e.g. immigration, conservation, etc. 	

Strategy 3.2: Strengthen tourism statistics, research and performance measurement

Concept

Implementing the various strategies and activities outlined above will require substantial investment in financial and human resources. The expectation should be to achieve a healthy return on such investment, as projected in the vision and objectives (sections 3.1 and 3.2).

Peter Drucker (the famous strategy guru) is renowned for his saying “if you can’t measure it, you can’t manage it”; a rule that is of particular relevance to destination marketing. While it is not easy to measure the results and return on investment of every individual tourism marketing activity given the many factors that weigh in on such performance, the ultimate aim of the strategy is to achieve the vision and growth objectives set in sections 3.1 and 3.2. These are indeed measurable, among others, through:

- Collecting and analyzing high quality and detail of visitor arrival statistics
- Conducting regular tourism exit surveys
- Setting up a Tourism Satellite Account (TSA), which extracts the contribution of tourism from the national economic accounts. This is the ultimate step in calculating the direct, indirect and induced impacts of tourism, as the “tourism dollar” permeates through the Sierra Leone economy, with its value chains extending to all sectors of the economy

Elements and actions

Element	Actions
Phase 1: Collect, analyze and publish regular, valid and reliable tourism statistics and results of a tourism exit survey	
Tourism arrival statistics	<ul style="list-style-type: none"> • Assessment and gap analysis: Appoint a service provider to assess the current status of visitor arrival statistics and gaps in this regard, including: <ul style="list-style-type: none"> ○ Reliability of the collection method and process ○ Comprehensiveness of statistics collected ○ Data capturing system ○ Time lags and reasons ○ Data analysis – refinement, alignment with UNWTO guidelines, etc.
	<ul style="list-style-type: none"> • Working group: Set up a working group with Statistics Sierra Leone, immigration authorities, possibly academics and other relevant parties to address any gaps identified and to ensure that valid, reliable and detailed arrival statistics are published on a monthly basis
	<ul style="list-style-type: none"> • Barometer: Publish a quarterly or bi-annual barometer of tourism performance, based on the arrival statistics, which should be accessible on the NTB website and per email exchange
Tourism exit survey	<ul style="list-style-type: none"> • Service provider: Draft a TOR and appoint a suitable service provider (expert in market research) for implementing and delivering the survey
	<ul style="list-style-type: none"> • Survey planning and set-up: The appointed service provider will work closely with NTB in setting up a tourism exit survey, to be conducted on an annual basis with data collection

Element	Actions
	<p>at regular intervals throughout the year to ensure representative sampling. In setting up the survey, attention should, amongst others, be given to:</p> <ul style="list-style-type: none"> ○ <i>Sampling and recruitment of survey respondents:</i> Methodology should ensure a probability method that allows for testing sampling error and confidence intervals for the results ○ <i>Locations of data collection:</i> The arrival and departure process from the ferry terminal to Lungi Airport should be thoroughly assessed to ensure data collection at the most optimal locations, when potential respondents will have adequate time and conditions are suitable for interviewing ○ <i>Method of data collection:</i> If online applications are used to collect data, care should be taken to ensure compatibility of software and internet connectivity. Similarly, interviewers should be carefully selected and language abilities should be considered ○ <i>Data content and analysis:</i> Thorough thought should be given to the type and detail of data to be collected from respondents to ensure applicability to destination management and marketing, and to inform performance management
Tourism exit survey (cont.)	<ul style="list-style-type: none"> • Survey execution: The exit survey will be executed in accordance with the survey plan outlined above • Survey reporting and communication: The results of the survey will inform NTB activities and should be published or made available to the broader tourism industry. A series of information sessions could be held with industry partners, to communicate the survey results and implications for future tourism planning
Phase 2: Further improve information and knowledge management	
Tourism Satellite Account (TSA) feasibility	<ul style="list-style-type: none"> • Expertise: Since tourism satellite accounting is a complex process, it requires excellent skills and understanding of statistical calculations like input-output analysis as well as the technical definitions of tourism aspects to include in the accounts. Internal expertise should be recruited and developed through engagement with UNWTO. Such expertise should ideally be located and developed in Statistics Sierra Leone (SSL). In addition, a TSA workgroup could be established between NTB, SSL, the central bank and other suitable bodies and individuals • Due diligence assessment and planning: A thorough assessment of data requirements and gaps relating to a TSA will be made and based on the findings a detailed workplan will be developed for addressing data gaps and constructing the TSA. • Execution and publishing: Should the establishment of a TSA be deemed feasible, results will be computed and the key findings will be published and communicated on a regular basis
Tourism Compendium	<ul style="list-style-type: none"> • Compilation: The tourism arrivals statistics, results of the tourism exit survey and other relevant tourism statistics, e.g. entrances to National Parks, museums and other facilities will be compiled and published as an annual tourism statistical compendium, which will be made available to investors and used as source for tracking tourism performance

4.4 Conclusion

4.4.1 Strategy success factors

This Sierra Leone tourism branding and marketing strategy charts the way for long-term sustainable growth in tourist arrivals to the country. The strategy recognizes the fact that Sierra Leone is at the early stages of the tourism destination life-cycle and adopts a phased marketing approach, aimed at building up Sierra Leone's brand reputation and tourism economy in a responsible and sustainable manner.

It should be emphasized that the success of the marketing and branding strategy is dependent on a number of critical success factors including:

- *Continued peace and stability:* Sierra Leoneans have made great strides during the past 15 years in ensuring and maintaining political peace and stability. However, past negative perceptions among potential international travelers still exist and while the marketing and branding strategy will go a long way at addressing these, continued peace and stability is a pre-requisite for success in this regard.
- *Effective tourism institutions and capacity:* While implementation support for various of the activities proposed could be outsourced, dedicated tourism institutional capacity in the public sector will be required to manage the overall program. Marketing capacity in NTB capacity should continuously be strengthened and staff trained up, especially in skills and tactics relating to digital marketing.
- *Adequate funding:* Estimated costs of implementing the strategy will be indicated in the implementation actions plan, which will be included in the final strategy and action plan document. Without such funding it will not be possible to conduct the basic marketing activities presented in this document. Then Government, in association with International Cooperating Partners should provide NTB with adequate funding to ensure consistent implementation of the strategy.
- *Vibrant public-private partnership:* The marketing and branding strategy was formulated through active involvement of public and private sector stakeholders. Sustaining this partnership will be of critical importance to the successful implementation of the strategy.
- *Suitable monitoring and reporting:* The activities and impacts of the proposed marketing activities should be monitored closely and reported regularly and transparently to stakeholders. This is necessary to both retain stakeholder confidence and adapt activities timeously, where required.

4.4.2 Institutional recommendations

The implementation of this comprehensive marketing and branding strategy will rest squarely on the shoulders of the Sierra Leone National Tourism Board.

As found during the situation analysis stages of the strategy development, NTB's marketing department is thinly staffed. While the organisation as had some experience in implementing traditional business-to-business (B2B) marketing initiatives, especially participation in trade shows, knowledge and capacity in the area of digital, business-to-consumer (B2C) marketing is very limited.

For reasons explained, this strategy proposes a shift from primarily traditional B2B marketing channels to a suitable mix of traditional and digital marketing. The strategy development project has established a sound launchpad for a digital marketing growth path, through development of a high-quality website, establishment of social media platforms on Facebook, Instagram, YouTube and Twitter and populating these with foundational contents created by the consultant team and a team of influencers (bloggers) who visited Sierra Leone during the course of the strategy development project.

The five-year costed action plan below makes provision for a digital marketing agency to support NTB in implementing the strategy during the next five years.

However, such outsourced services alone will not be able to do justice to the strategy and to ensure a sustained digital marketing drive, it is recommended:

- *That a dedicated digital market specialist* be appointed on the permanent staff establishment of NTB, to lead and coordinate digital marketing aspects of the marketing and branding strategy, and to train up and empower the marketing team in the area of digital marketing
- That the NTB marketing team engage in an *ongoing capacity building (training) program* on the topic of digital marketing to ensure that they fully grasp the principles and practices of digital marketing and are able to maximise digital marketing opportunities, in collaboration with the proposed market-based representatives.

5 Five-year Costed Action Plan

The following section contains a costed action plan for implementing the activities outlined in Section 4 above during the first five years (2022-20226).

The implementation action plan should be used as a financial planning and performance monitoring tool, as it contains indicative costs for the executing the various activities, as well as indicators of their successful implementation.

5.1 Thrust 1: Destination branding and promotion

Strategy 1.1: Ensure well-branded and maintained marketing and information collateral

Phase 1: Rebrand existing print materials and improve digital media

Elements	Actions	Notes	Budget (USD)					Success Indicators
			Y1	Y2	Y3	Y4	Y5	
Official Visitor Guide	<ul style="list-style-type: none"> Rebrand and redesign the Official Visitors Guide for limited B2B distribution and print copies 	1,000 guides every 2 years	4 000	-	4 000	-	4 000	Rebranded guide produced and printed, 500 copies p.a. distributed to trade, missions, etc.
Visitor Map	<ul style="list-style-type: none"> Print additional 10,000 copies of the Official Visitor Map 	10,000 maps every 3 years	2 500	-	-	2 500	-	Rebranded map printed, 5,000 copies distributed to business and consumer contact p.a.
Poster Series	<ul style="list-style-type: none"> Print 1,000 promotional posters for hanging in NTB and MoCTA offices, foreign affairs missions, airport, other government offices and private establishments 	1,000 copies representing 4 different posters every 2 years	1 500	-	1 500	-	1 500	1,000 branded posters printed and distributed to public and private sector partners every 2 years
	<ul style="list-style-type: none"> Distribute posters and other materials to foreign missions and relevant points of interest in Sierra Leone 	Distribution costs	200	200	200	200	200	Posters effectively distributed and confirmed that they have been put up
Destination website and blog	<ul style="list-style-type: none"> Maintain and promote the NTB “Explore Freedom” website and blog, including subscription plug-ins for website, Mailchimp and Gmail accounts 	Cost of subscriptions and plugins	500	500	500	500	500	Website up to date with latest WordPress upgrades and plugins
Destination social media platforms	<ul style="list-style-type: none"> Maintain “Explore Freedom” social media platforms in support of the destination marketing campaign <ul style="list-style-type: none"> Facebook Page Instagram account YouTube account 	Included in digital support agency costs	Content management see 1.2 and 1.3 below	Content management see 1.2 and 1.3 below	Content management see 1.2 and 1.3 below	Content management see 1.2 and 1.3 below	Content management see 1.2 and 1.3 below	Social media platforms all operational and up to date

Elements	Actions	Notes	Budget (USD)					Success Indicators
			Y1	Y2	Y3	Y4	Y5	
Destination video material	<ul style="list-style-type: none"> Produce a portfolio of exciting short videos, using where possible NTB's existing video footage: <ul style="list-style-type: none"> Hero video: 5 min Short videos: 2 min 	High quality "Explore Freedom" Hero video 7 day shoot; short additional videos thereafter	30 000	10 000	10 000	10 000	10 000	High quality video material available for multiple use, specifically produced to communicate the new brand to targeted market segments
Stakeholder database	<ul style="list-style-type: none"> Establish and maintain a destination stakeholder database 	Database software, Mailchimp account, communication costs	2 000	2 000	2 000	2 000	2 000	Stakeholder database well-structured and constantly updated and expanded, especially following marketing engagements such as trade shows, etc.
Digital newsletter	<ul style="list-style-type: none"> Design and produce an email newsletter template for distribution to stakeholder database 	Outsourced production of 6 annual newsletters	3 000	3 000	3 000	3 000	3 000	6 Annual Newsletters produced and distributed
Destination image library	<ul style="list-style-type: none"> Create an organized image library by categorizing, tagging, organizing and storing in Cloud the current portfolio of still images and video footage for use in digital media (website, electronic brochure, social media channels) as well as print and outdoor branding 		2 000	2 000	2 000	2 000	2 000	A structured image library created
	<ul style="list-style-type: none"> Appoint a suitable professional photographer under a clear TOR to shoot and provide images owned by NTB, based on a "shot list" of images to fill key gaps in photographic library and 	Y1&2, Professional Photographer on 7 day shoot, 200-300 high quality picture, top up thereafter	10 000	10 000	5 000	5 000	5 000	Image bank expanded to 500 professionally produced images, representing all aspects of the brand
Total Strategy 1.1: Ensure well-branded and maintained marketing and information collateral			55 700	27 700	28 200	25 200	28 200	

Strategy 1.2: Implement a domestic travel and awareness campaign

Phase 1: Launch domestic tourism travel and awareness campaign

Elements	Actions	Notes	Budget (USD)					Success Indicators
			Y1	Y2	Y3	Y4	Y5	
Collateral production								
Planning and preparation	<ul style="list-style-type: none">TOR formulation, RFP, evaluation and appointment of service provider							TORs produced and issued
Development of special offers deals	<ul style="list-style-type: none">Meeting in Freetown of private sector to explain concept and solicit participation; receive and database special offers; format and populate offers for website and campaign leaflet	Venue and refreshments	1 400	1 400	1 400	1 400	1 400	At least 10 private sector special campaign offers submitted
Art work for campaign identity and mascot	<ul style="list-style-type: none">3 examples of campaign logos and mascot for final selection	Outsourced design costs	800	-	-	-	-	Campaign logo produced and approved
	<ul style="list-style-type: none">Print ready artwork for the selected campaign logo and messages for use on campaign print and digital collateral in colour and B&W		500	-	-	-	-	
Pop-up stands	<ul style="list-style-type: none">Design, manufacture and deliver mobile pop up stand, carrying campaign logo, messages and pictures including cut out of campaign mascot for photo posing	Biennial production and delivery costs of stands	6 500	-	6 500	-	-	Pop-up stands produced and delivered
Audio campaign song	<ul style="list-style-type: none">Copywrite, compose, produce and record campaign song (in 4 major dialects)	Biennial outsourced production costs	5 000	-	5 000	-	-	Campaign jingle produced and ready for broadcasting
Breaking campaign song into 3, 40 second radio messages in 3 languages to communicate	<ul style="list-style-type: none">Copywriting and approval of messages in Krio, Mende and Themne		2 250	-	2 250	-	-	Short messages produced and ready for broadcasting
	<ul style="list-style-type: none">Recording of campaign messages in broadcast format		2 250	-	2 250	-	-	
Campaign website and landing page	<ul style="list-style-type: none">Wireframe, including provision for campaign messages, visual and audio collateral, special offers lists and content writing for approval		500	-	500	-	-	Campaign landing page added to website
	<ul style="list-style-type: none">Build, design, populate and launch landing page		600	-	600	-	-	
4 video clips	<ul style="list-style-type: none">Plan, copywrite and edit video clips using existing video footage (no new video footage to be produced) and applying the short campaign message jingles as background audio	Y2 onwards costs for additional domestic video production	1 400	3 000	3 000	3 000	3 000	Video clips produced and ready for application

Elements	Actions	Notes	Budget (USD)					Success Indicators
			Y1	Y2	Y3	Y4	Y5	
Campaign social media pages	<ul style="list-style-type: none"> Establish Facebook and Instagram campaign pages with relevant hashtags and campaign designs and identity incorporated 	PR agency budget	-	-	-	-	-	Social media pages set up and content added
	<ul style="list-style-type: none"> Populate with launch images and text 	PR agency budget	-	-	-	-	-	
Campaign promotional leaflet	<ul style="list-style-type: none"> Design leaflet incorporating campaign identity and offers for approval (Krio & English only) - 2 page flyer 	Design costs	275	275	275	275	275	50000 campaign leaflets printed and delivered to NTB
	<ul style="list-style-type: none"> Print leaflets for distribution at information offices, accommodation and at special events and promotions 	50,000 leaflets @ 5 cents	2 500	2 500	2 500	2 500	2 500	
Campaign billboards	<ul style="list-style-type: none"> Design billboards incorporating campaign identity for approval 	Biennial design costs	500		500			Campaign billboards designed and erected
Campaign wear and giveaways	<ul style="list-style-type: none"> Design T-Shirts, Caps and Pencil Bags for approval 	Design costs	500	500	500	500	500	Items designed and approved
	<ul style="list-style-type: none"> Manufacture and deliver T-shirts 	1,000 T-shirts @ \$5	5 000	500	500	500	500	1,000 T shirts produced and delivered to NTB
	<ul style="list-style-type: none"> Manufacture and deliver Caps 	1,000 caps @ \$3	3 000	500	500	500	500	1,000 caps produced and delivered to NTB
	<ul style="list-style-type: none"> Manufacture and deliver branded stationary 	5,000 items @ \$1	5 000	500	500	500	500	5,000 give-aways produced and delivered to NTB
Campaign tactical implementation								
Appoint campaign PR management agency	<ul style="list-style-type: none"> Agency appointed on a monthly retainer to work with NTB in rolling out the campaign tactics and maximise PR around campaign 	Retainer fee of US\$5,000 per month for 6 months	30 000	30 000	30 000	30 000	30 000	Appointed Jan '22
Editorial radio and TV discussion programmes	<ul style="list-style-type: none"> Arrange weekly radio programme discussions, Minister, GM, PS, staff and private sector stakeholders on 3 radio stations 	PR agency budget	-	-	-	-	-	A regular, weekly slot for 6 months
	<ul style="list-style-type: none"> Arrange TV programme discussions, Minister, GM, PS and private sector stakeholders 	PR agency budget	-	-	-	-	-	Suitable discussions arranged
Media campaign	<ul style="list-style-type: none"> Flight radio advertising: messages with jingles 	As per NTB cost indication	32 400	30 000	30 000	30 000	30 000	90 Radio advertisements broadcast per month for 6 months
Billboards	<ul style="list-style-type: none"> Print, erect, display and remove giant billboards 	Annual costs	37 500	37 500	37 500	37 500	37 500	5 billboards designed and installed

Elements	Actions	Notes	Budget (USD)					Success Indicators
			Y1	Y2	Y3	Y4	Y5	
Social media campaign	• Formulate social media campaign plan and messaging strategy	PR agency budget	-	-	-	-	-	- Clear social media plan with messages and audience canvassing outlined
	• Post campaign messages alternating on Facebook and Instagram, and social media engagement	PR agency budget	-	-	-	-	-	- 2 x specific campaign posts per week
Social media competitions	• Publicise 2 competitions a) Name the Mascot and b) Best tourism picture posting on Facebook and Instagram with Hashtag #Torizm4allman	PR agency budget	-	-	-	-	-	- At least 50 entries per week
	• Evaluate weekly and award weekly prize	2 weekly prizes worth \$50 each for 25 weeks	2 500	2 500	2 500	2 500	2 500	At least 50 entries per week
Schools Tourism competition	• Formulate competition structure and rules	PR agency budget	-	-	-	-	-	- Clear competition rules outlined and documented
	• Invite schools through Dept Education and select participating schools	PR agency budget	-	-	-	-	-	- Agreement with Dept Education
	• Receive and accept entries	PR agency budget	-	-	-	-	-	- At least 50 school entries and 10,000 learners
	• Award for top 5 and winner prizes	5 Prizes: Winning school -\$5000; 2 nd - \$2500; 3 rd \$1500; 4 th \$1000; 5 th \$500	10 500	10 500	10 500	10 500	10 500	By mid '22
Community tourism awareness competition - best village tourism concept. Engagements to communicate campaign messages and explain competition to leaders of key tourism villages	• Formulate competition structure and rules							Clear competition rules formulated
	• Communicate campaign messages and explain competition to chiefs and headmen of tourism-interested villages	Communication method to be defined in consultation with relevant authorities						Concept communicated and interest gained from at least 20 villages
	• Venue hire	Costs as per NTB Domestic Budget Analysis	1 050	1 050	1 050	1 050	1 050	
	• Refreshments and Meals		3 360	3 360	3 360	3 360	3 360	
	• Per Diem: Minister and Dep Minister, Attendees, CSOs, media, private sector, Tourism officials		11 570	11 570	11 570	11 570	11 570	
	• Transport costs NTB & MTCA Teams, Media, & Local Authorities		12 155	12 155	12 155	12 155	12 155	
	• Receive and evaluate entries	PR agency budget	-	-	-	-	-	
	• Award for top 5 and winner prizes	5 Prizes:	18 500	18 500	18 500	18 500	18 500	During President's Tourism Awards

Elements	Actions	Notes	Budget (USD)					Success Indicators
			Y1	Y2	Y3	Y4	Y5	
		Winning village - \$10,000 ; 2 nd - \$5,000; 3 rd \$2,000; 4 th \$1,000; 5 th \$500						
Exposure trips to key sites and launch project interventions	• Invite relevant leaders	Costs as per NTB Domestic Budget Analysis						20 political leaders exposed to key tourism development projects [NTB advises that this has already been budgeted for elsewhere]
	• Refreshments and Meals		-	1 800	1 800	1 800	1 800	
	• Per Diem: Minister and Dep Minister, Attendees, CSOs, media, private sector, Tourism officials		-	5 000	5 000	5 000	5 000	
	• Transport costs NTB & MTCA Teams, Media, & Parliamentarians		-	6 000	6 000	6 000	6 000	
Pop-up stand promotions	• Formulate and approve pop-up stand promotion program	PR agency budget	-	-	-	-	-	- At least one promotion per week
	• Appoint campaign youth ambassadors in each region to staff pop up promotions	Payment of 3 youth ambassadors for 26 promotions @ \$50	3 900	4 500	5 000	5 000	5 000	30 Youth Ambassadors trained and participating
	• Arrange weekly pop-up exhibits at key government, corporate offices and special events to promote special offers and awareness messages	PR agency budget	-	-	-	-	-	- At least one promotion per week
	• Appoint Awards organising team and judging panel	PR agency budget	-	-	-	-	-	- Organising team and judging panel appointed
Annual President's Tourism Awards	• Formulate and agree format, entry and evaluation process	PR agency budget	-	-	-	-	-	- By January '22, Closing April '22
	• Formulate and agree format, entry and evaluation process	PR agency budget	-	-	-	-	-	- By mid '22
	• Invite nominations	PR agency budget	-	-	-	-	-	- By January '22, Closing April '22
	• Evaluate and decide on awards	PR agency budget	-	-	-	-	-	- Evaluation conducted by mid '22
	• Arrange ceremony, tickets, invitations	Cost of event - 200 guests Y1 and 300 guests thereafter	20 000	30 000	30 000	30 000	30 000	Awards ceremony by mid '22
Total Strategy 1.2: Implement a domestic travel and awareness campaign			221 410	213 610	231 710	214 110	214 110	

Strategy 1.3: Implement #ExploreFreedom, a coordinated and integrated international brand and image promotion campaign

Phase 1: Focus on Explorer, Adventure and Sport Enthusiasts and SAVE segments Core Source Markets

Elements	Actions	Notes	Budget (USD)					Success Indicators
			Y1	Y2	Y3	Y4	Y5	
Campaign coordination and management	Draft a detailed campaign plan and coordinate execution of all activities in plan	Provision for consultant support	10 000	-	-	-	-	- Campaign plan produced and signed off by all key stakeholders
Campaign execution support	Appoint a suitable marketing/PR agency(s) to work with the NTB team for coordinating the execution of the campaign as outlined below. Such appointments may best be done:							
	<ul style="list-style-type: none"> a) digital marketing support: at global level for servicing activities that cut across various source markets and segments 	\$4,000 p.m.	48 000	48 000	48 000	48 000	48 000	Digital support agency appointed through open bidding on 12-month retainer, renewable
	<ul style="list-style-type: none"> b) at source market level in core markets such as the UK, USA and Europe, for market-specific activities. 	Y1&2 2 Reps: UK & Europe; Y3 onwards add USA. \$2,000 p.m.	48 000	48 000	72 000	72 000	72 000	Market based representatives appointed through open bidding on 12-month retainer, renewable for 3 years
International travel trade due diligence and trade research	Contact targeted tour operators in strategic source markets that specialize in travel arrangements for targeted segments and provide them with information to assess their interest, abilities, procedures and requirements for conducting joint travel promotions in support of the campaign	Included in market-based representatives retainer	-	-	-	-	-	- Interest and probability of promoting travel to Sierra Leone established and documented among a targeted group of international operators
Joint Marketing Agreements (JMAs)	<ul style="list-style-type: none"> Conclude Joint Marketing Agreements (JMAs) with selected international operators for promoting Sierra Leone to their clientele. 	Y1: 2 JMA's; Y2: add 2 JMA's; Y3-5: 4 JMA's/Year. @\$10000/JMA	20 000	40 000	40 000	40 000	40 000	JMA's concluded as per budget and targets in Notes column
International travel trade education	<ul style="list-style-type: none"> Conduct various interactions to empower selected international operators with information to get them acquainted with Sierra Leone, including: <ul style="list-style-type: none"> Online discussions and information exchanges Agent familiarization (FAM) tours with carefully selected high quality international tour operators in key target markets Online interactions between local Sierra Leone hospitality and tour operators and international tour operators 	For market-based representatives						
		Included in market-based representatives retainer						At least 12 organized online engagements with key operators p.a.
		4 trips of 2 agents \$3000/pp	24 000	32 000	32 000	32 000	32 000	At least 8 key contract managers hosted per year
		Cost of Suitable Online Platforms	3 000	3 000	3 000	3 000	3 000	At least 1 virtual group event organized
Trade fairs	Promote brand Sierra Leone at selected trade fairs including:							

Elements	Actions	Notes	Budget (USD)					Success Indicators
			Y1	Y2	Y3	Y4	Y5	
	• ITB Berlin, covering the European and other global markets							At least 3 firm commitments for new programs to Sierra Leone concluded per attendance, with tour operators who are able to bring more than 100 leisure travelers p.a. to Sierra Leone
	○ Stand Payment	40sqm stand space and other charges	12 075	12 650	13 800	14 950	14 950	
	○ Designing, Building and Furnishing		23 575	25 875	27 600	28 750	28 750	
	○ Flights		12 000	12 000	12 000	12 000	12 000	
	○ DSA, Minister and 4 officials, 10 days + terminal expenses		28 968	28 968	28 968	28 968	28 968	
	• WTM London, covering UK, Europe and other global markets							At least 3 firm commitments for new programs to Sierra Leone concluded per attendance, with tour operators who are able to bring more than 100 leisure travelers p.a. to Sierra Leone
	○ Stand Payment	40 sqm stand space and other charges	32 911	37 251	41 592	45 932	45 932	
	○ Designing, Building and Furnishing		31 360	35 700	40 180	44 520	44 520	
	○ Flights		12 000	12 000	12 000	12 000	12 000	
	○ DSAs, Minister and 4 officials, 7 days + terminal expenses		21 067	21 702	21 702	21 702	21 702	
	• FITUR, Madrid (Optional, not included in total budget)							At least 2 firm commitments for new programs to Sierra Leone concluded per attendance
	○ Stand Payment	30sqm stand space and other charges	6 850	7 300	7 900	8 200	8 500	
	○ Designing, Building and Furnishing 30sqm		20 000	22 000	24 000	26 000	28 000	
	○ Flights		12 000	12 000	12 000	12 000	12 000	
	○ DSAs, Minister and 4 officials, 7 days + terminal expenses		28 968	28 968	28 968	28 968	28 968	
	• A selected trade fair in the USA, with specific focus on the diaspora market e.g. in Atlanta or southern coast states							At least 2 firm commitments concluded for diaspora groups to visit Sierra Leone, per attendance
	○ Stand Payment	20sqm stand space and other charges	10 000	10 000	10 000	10 000	10 000	
	○ Designing, Building and Furnishing 40sqm		15 000	15 000	15 000	15 000	15 000	
	○ Flights		12 000	12 000	12 000	12 000	12 000	
	○ DSAs, Minister and 4 officials, 7 days + terminal expenses		28 968	28 968	28 968	28 968	28 968	
	○ Should COVID-19 or other events prevent travel, participation in virtual trade fairs is recommended							
	NOTE: It is highly recommended that NTB should be accompanied by at least five private Sierra Leone tourism operators when engaging in trade fairs or trade roadshows.							Minimum 2 private sector products/service providers to accompany NTB to trade fairs in Y1 &2, minimum 4 from Y3 onwards

Elements	Actions	Notes	Budget (USD)					Success Indicators
			Y1	Y2	Y3	Y4	Y5	
Trade sales trips and workshops	<ul style="list-style-type: none"> Arrange a sales roadshow in at least two core source markets per annum. <ul style="list-style-type: none"> Flights Internal transport DSA officials DSA subsidy for 4 private sector participants <p><i>Note:</i> Should COVID-19 or other events prevent travel, roadshows could be organized virtually</p>	p/sector to pay own flights						2 sales trips conducted per annum in core source markets to engage directly with selected operators and their travel agency networks; at least 3 private sector representatives to accompany NTB
			4 000	4 000	4 000	4 000	4 000	
			8 000	8 000	8 000	8 000	8 000	
			11 800	11 800	11 800	11 800	11 800	
			12 000	12 000	12 000	12 000	12 000	
Website optimization	<ul style="list-style-type: none"> SEO through appropriate meta-tagging and other technical SEO method and building internal and external links 	Covered by digital marketing support agency	-	-	-	-	-	Consistent improvement in website SEO score
PPC Campaign Advertising	<ul style="list-style-type: none"> Produce various advertising variants and promote to target segments in core markets, through Pay-per-Click advertising 	Advertising costs	30 000	30 000	30 000	30 000	30 000	Consistent improvement in website SEO score By year 4 35% of website traffic should be from organic sources
Social Media Marketing	<ul style="list-style-type: none"> Develop and implement a detailed social media communication plan and content calendar including messages, images, frequency of posting, links to website and other platforms, etc. 	Covered by digital marketing support agency	-	-	-	-	-	Monthly paid traffic to the website: 2,000
	<ul style="list-style-type: none"> Make regular posting on NTB's social media platforms, including Facebook, Twitter, Instagram, Pinterest, YouTube 	Digital content writing support	15 000	15 000	15 000	15 000	15 000	Development of content calendar 12 – 16 posts per month on each channel barring YouTube Average cross platform engagement of 1.25%
	<ul style="list-style-type: none"> Conduct advertising on Facebook and Instagram targeted at selected market segments and source markets 	Advertising costs	20 000	20 000	20 000	20 000	20 000	Generate 400,000 impressions for the posts each month
Blog coverage	<ul style="list-style-type: none"> Create and publish SEO optimized #ExploreFreedom campaign blog posts. 	As per digital content writing support	-	-	-	-	-	Grow followers each year by: Facebook: 10,000 Instagram: 5,000 Twitter: 2,000
#ExploreFreedom Newsletter	<ul style="list-style-type: none"> Compile newsworthy #ExploreFreedom stories and publish and distribute a quarterly newsletter to the stakeholder database 	Costs for support in producing newsletter	6 000	6 000	6 000	6 000	6 000	6-8 Newsletters produced and distributed per annum
#ExploreFreedom advertorial coverage	<ul style="list-style-type: none"> Commission regular articles to be written and published on popular online travel publications & content portals 	Costs for advertorial placement. As per digital content writing support	5 000	5 000	5 000	5 000	5 000	At least advertorial placements in key business and consumer travel publications per annum
Third party platforms	<ul style="list-style-type: none"> Commission repurposing of blog posts and articles and publish on Wiki Travel along with appropriate images and website links 	Covered by digital marketing support agency	-	-	-	-	-	All blog and other articles distributed through all available channels

Elements	Actions	Notes	Budget (USD)					Success Indicators
			Y1	Y2	Y3	Y4	Y5	
Influencer marketing	<ul style="list-style-type: none"> Influencer familiarization trips: Arrange FAM trips for bloggers to generate and promote daily social media coverage during the trip on Instagram, Instagram Stories, Twitter and Facebook 	Travel costs and influencer payments 4 influencers p.a.	8 000	8 000	8 000	8 000	8 000	Four selected influencers invited to visit Sierra Leone with
	<ul style="list-style-type: none"> Influencer-produced video content: As part of Fam trips 	12 videos @ \$500	6 000	6 000	6 000	6 000	6 000	12 short video clips of 2-3 minutes produced by influencers with copyright to NTB
#ExploreFreedom special interest marketing	<ul style="list-style-type: none"> Contact and engage targeted special interest organizations (see Appendix 1) 	Included in market-based representatives retainer	-	-	-	-	-	- At least one partnership with a special interest group/association agreed, for a
	<ul style="list-style-type: none"> Identify Sierra Leone tourism operators who are interested and equipped, to develop travel offers to suit special interest association requirements 	Included in market-based representatives retainer	-	-	-	-	-	- specific engagement with NTB and SL operators
	<ul style="list-style-type: none"> In partnership with associations, promote special interest offers to association members and affinity groups 	Included in market-based representatives retainer	-	-	-	-	-	- At least one special interest promotion p.a.
#ExploreFreedom media and PR coverage	<ul style="list-style-type: none"> Editorial coverage: Identify and evaluate potential journalists/writers in key source markets 	Included in market-based representatives retainer	-	-	-	-	-	- Editorial coverage of Sierra Leone tourism tracked and quantified
	<ul style="list-style-type: none"> Media familiarization: Conduct media visits for carefully selected journalists 	6 journalist trips p.a.	18 000	18 000	18 000	18 000	18 000	Six journalists hosted p.a. resulting in at least 10 articles in influential travel publications (digital and print)
Partnerships with Diplomatic Corps to promote the campaign	<ul style="list-style-type: none"> Capacity building: In collaboration with Ministry of Foreign Affairs, conduct online seminar(s) with relevant staff of diplomatic missions to communicate and empower them and brainstorm with them regarding tourism promotion 	NTB team with support of MoTCA, MoFAIC and market-based reps	-	-	-	-	-	- At least one online engagement and training session conducted with relevant staff of missions, in core and growth markets
	<ul style="list-style-type: none"> Office dressing: Provide missions with branded posters to showcase the iconic sites of Sierra Leone 	MoFAIC to distribute and monitor	-	-	-	-	-	- Posters displayed in key Sierra Leone Embassies
	<ul style="list-style-type: none"> Regular communication: Communicate on a monthly basis with diplomatic missions abroad regarding campaign progress 	Repurpose campaign newsletter above	-	-	-	-	-	- Campaign newsletter sent to all foreign offices
Total Strategy 1.3 Implement #ExploreFreedom, a coordinated and integrated international brand and image promotion campaign			536 724	566 914	602 610	613 590	613 590	

5.2 Thrust 2: Product development and packaging

Strategy 2.1: Package, develop and promote suitable “Explore Freedom” circuits

Phase 1: Scope , develop and promote main circuits

Elements	Actions	Notes	Budget (USD)					Success Indicators
			Y1	Y2	Y3	Y4	Y5	
Circuits conceptualizing	Conduct #Explore Freedom circuit identification and mapping in partnership with the private sector and regional stakeholder.	See as per Section 4.3.2 above						Circuits clearly prioritized
Circuit forums	Set up circuit forums will be set up for each of the identified routes to coordinate activities of various role players involved in the development and promotion of the various routes.	Provision for transport allowance, DSA for officials,. 2 circuit forums Y1, 4 forums from Y 2 onwards	10 000	20 000	20 000	20 000	20 000	Representative circuit forums set up and functions
Circuits inventory and auditing	Make an inventory of attractions, experiences, facilities and services on each route, evaluate these in terms of facilities quality, safety, human resources capacity, etc. and draft a plan of action for enhancement of experiences and facilities on the various routes	Cost of consultancy services	25 000	25 000	-	-	-	Comprehensive inventory of attractions, experiences and services documented and evaluated
Circuits mapping and digitizing	Mapping: Map the circuits out in detail on suitable mapping/GIS software	Included in consultancy services	-	-	-	-	-	Circuits digitized and mapped on website
	Digitalization: Map circuits on the destination website using interactive mapping functionality	Website plugin and functionality development	15 000	15 000				
Circuits promotion	Promote the routes through the #Explore Freedom promotional campaign, including through travel trade and media familiarization visits and through all elements of the digital promotion strategy	Included in campaign execution costs	-	-	-	-	-	Circuits integrated in all campaign promotions
Visitor circuits development and improvement	“Hardware” improvements: physical works to improve tourism areas and experiences, such as access routes, parking, trails (for vehicles, pedestrians, bikes, etc.), tourist signage, observation platforms, safety railings, rest and shade areas, signposting, etc.	Provision of for "light" visitor improvements scheduled from Y2 onwards	-	50 000	50 000	50 000	50 000	Key gaps in visitor facilities and experiences on circuits addressed
	“Software” improvements: improving, training and putting in place organizational structures, cultural services (performers, hosts, etc.), interpretive guiding, porters, etc. that can change a place into a package of experiences.	Provision for training to be outsourced	20 000	30 000	30 000	30 000	30 000	Frontline staff and service providers on circuits trained up and marked improvement in visitor satisfaction
	Product packaging: packaging and branding attractions and experiences so that a value can be attached to them and they can be promoted commercially	Included in campaign execution costs	-	-	-	-	-	Consistent improvements in how circuits are captured and presented
Total Strategy 2.1: Package, develop and promote suitable “Explore Freedom” circuits			70 000	140 000	100 000	100 000	100 000	

Strategy 2.2: Package and promote suitable hospitality investment opportunities

Phase 1: Accommodation improvement and expansion in prime tourism areas aimed the Explorer, Outdoor Adventure and Sport Enthusiasts and SAVE market segments

Element	Actions	Notes	Budget (USD)					Success Indicators
			Y1	Y2	Y3	Y4	Y5	
Destination master plan	<ul style="list-style-type: none"> Undertake a holistic planning study to formulate an overall 20-year tourism strategy and master plan 	Under separate budget provision	-	-	-	-	-	20-year tourism Master Plan drafted
Investment portfolio	<ul style="list-style-type: none"> Based on the master plan, identify a portfolio of potential investment sites and opportunities 	As part of Master Plan development	-	-	-	-	-	Portfolio of 10-15 priority investment sites and opportunities identified
Pre-feasibility studies	<ul style="list-style-type: none"> Conduct pre-feasibility studies as a basis for final selection of investment-ready portfolio of opportunities. 	Provision for 4 pre-feasibility studies from Y2 to Y 4	-	40 000	40 000	40 000	40 000	Scope out opportunities and conduct pre-feasibility studies
Investment conditions	<ul style="list-style-type: none"> Clarify, stipulate and formalize internally investment conditions pertaining to the investment opportunities. 	Outsource Fact Paper on tourism investment conditions in SL	5 000	-	-	-	-	Fact Paper outlining investment conditions produced
Investment promotion	<ul style="list-style-type: none"> Draft and design investment profiles, investment prospectus and promotion plan and phasing 	Consultancy support for tourism investment promotion plan and prospectus, with support of SLIEPA Included in above	20 000	20 000	-	-	-	Investment profiles, prospectus and promotion plan produced and printed
	<ul style="list-style-type: none"> Investment promotion execution 	Provision for execution of investment marketing plan, in partnership with SLIEPA		20 000	35 000	35 000	35 000	Significant investor interest in tourism opportunities captured and at least 10 investment proposals received over the period
Proposals evaluation	<ul style="list-style-type: none"> Conduct due diligence of investment proposals received 	With SLIEPA	-	-	-	-	-	Due diligence of investment proposals conducted and key
Contract negotiation and award	<ul style="list-style-type: none"> Conduct negotiations with the preferred investor and award opportunities 	With SLIEPA	-	-	-	-	-	investment opportunities awarded and formal agreements signed with investors
Progress monitoring	<ul style="list-style-type: none"> Set in place a clear process of monitoring investment progress, 	With SLIEPA	-	-	-	-	-	Investment progress monitored
Total Strategy 2.2: Package and promote suitable hospitality investment opportunities			25 000	80 000	75 000	75 000	75 000	

Strategy 2.3: Launch a suitable tourism flagship events program

Phase 1: Set up events program and launch the International Freedom Festival as anchor event

Element	Actions	Notes	Budget (USD)					Success Indicators
			Y1	Y2	Y3	Y4	Y5	
Events support program	• Develop event support program	Cost of limited consultant support	5 000	-	-	-	-	Event support program formulated and approved
	• Provide financial support for flagship events	Support to be based on programme	25 000	25 000	25 000	25 000	25 000	Financial and technical support for 3-5 flagship events
Calendar of events	• Produce and update a calendar of all events taking place throughout the year	In website events calendar	-	-	-	-	-	Calendar of events populated and updated
International Freedom Festival as start-up anchor event	• Conceptualize Festival and arrange a founding stakeholder meeting	Venue and refreshment costs	1 000	1 000	1 000	1 000	1 000	Concept document produced and stakeholder meeting held
	• Appoint a service provider to conduct a feasibility study of Freedom Festival	Consulting services	15 000	-	-	-	-	Service provider appointed, feasibility study conducted
	• Steering committee to approach GoSL and other suitable event funders for event endorsement	Legal costs for agreement	2 000	-	-	-	-	Formal Government support and endorsement of Freedom Festival
	• Appoint a suitable professional event organizer for all event logistics, through the following actions:							Event organiser appointed
	○ Draft a TOR for an event organizer/manager	Consultant costs	1 000	-	-	-	-	
	○ Put out call for proposals	Advertising costs	500	-	-	-	-	
	○ Based on proposals, appoint a suitable company or person as event organizer	Outsourcing costs	-	100 000	100 000	100 000	100 000	
	• Attract suitable sponsors and funders for staging event	Seed funding; additional funds from sponsors		30 000	2 5000	20 000	20 000	Adequate sponsorships and co-funding attracted for staging event
	• Festival planning and staging	Event organizer	-	-	-	-	-	Festival effectively staged
	• Festival promotion	Included in Strategy 1.2 and 1.3 costs	-	-	-	-	-	Event attendance growing
	• Track event attendance and evaluate event impact and return on investment	Partnership with local university		3 000	3 000	3 000	3 000	Basic impact study conducted and reported by local university
Total Strategy 2.3: Launch a suitable tourism flagship events program			49 500	159 000	154 000	149 000	149 000	

5.3 Thrust 3: Effective delivery and value improvement

Strategy 3.1: Strengthen private sector tourism delivery capacity

Phase 1: Institute a capacity building and mentorship program for the inbound tourism operators

Element	Actions	Notes	Budget (USD)					Success Indicators
			Y1	Y2	Y3	Y4	Y5	
Program establishment	• Conduct needs assessment among existing and potential tour operators and agents	NTB team to do	-	-	-	-	-	- Needs assessment conducted and participating enterprises identified
	• Engage the international donor community to establish potential partners	NTB team to approach EU and country ICPs	-	-	-	-	-	- Other donors (ITC, CBI, GIZ, etc.) engaged
	• Formalize an agreement with a suitable partner to execute the program	NTB team to do	-	-	-	-	-	- Partnership agreement formalized
	• Appoint business trainers and coaches to engage with individual operators and to guide them	Mentors and coaches co-funded by participating donors	-	40 000	40 000	40 000	40 000	- Business trainer(s)/coach(es) appointed
	• Participant selection: Work with the partner organization in identifying and selecting participants in the program.	Mentors/coaches and NTB team to do	-	-	-	-	-	- 5-10 entrepreneurs selected
Program execution	• Formulate a training program and schedule and deliver formal short training sessions on an ongoing basis	Mentors/coaches to do	-	-	-	-	-	- Training program formulated and delivered throughout period
Market access opportunities for participants	• Provide and facilitate market access opportunities for entrepreneurs through e.g. <ul style="list-style-type: none"> ○ Online marketing ○ Trade fair participation ○ Tour operator workshops, etc. ○ Online marketing 	Based on support for 10 companies from Y2 onwards	-	40 000	40 000	40 000	40 000	- Selected enterprises given access to and supported to access marketing opportunities
Program monitoring	• Set in place performance measurement and monitoring indicators	Conducted by appointed coaches and mentors	-	-	-	-	-	- Performance indicators set tracked throughout the period
	• Monitor local travel trade delivery quality and efficiency in association with partners and address gaps and shortcomings	NTB as part of research programme	-	-	-	-	-	- Regular surveys and engagements conducted to monitor
Total Strategy 3.1: Strengthen private sector tourism delivery capacity			0	80 000	80 000	80 000	80 000	

Strategy 3.2: Strengthen tourism statistics, research and performance measurement

Phase 1: Collect, analyze and publish regular, valid and reliable tourism statistics and results of a tourism exit survey

Element	Actions	Notes	Budget SL					Success Indicators
			Y1	Y2	Y3	Y4	Y5	
Tourism arrival statistics	<ul style="list-style-type: none"> Appoint a service provider to assess the current status of visitor arrival statistics and gaps in this regard 	Consultant costs, working with SSL	25 000	-	-	-	-	Current status, gaps and opportunities I tourism information management identified
	<ul style="list-style-type: none"> Set up a working group with Statistics Sierra Leone, immigration authorities, possibly academics and other relevant parties to address any gaps identified 	Costs of working group meetings; SSL to chair	500	500	500	500	500	Tourism statistics working group set up and actions agreed
	<ul style="list-style-type: none"> Publish a quarterly or bi-annual barometer of tourism performance 	SSL to compile stats; cost of design and layout	-	1 000	1 000	1 000	1 000	Barometer of key tourism statistics published
Tourism exit survey	<ul style="list-style-type: none"> Appoint a suitable service provider (expert in market research) for implementing and delivering the survey 	Y1 Costs TOR & appointment; Y2 onwards outsourced	1 500	-	-	-	-	Service provider appointed
	<ul style="list-style-type: none"> Plan, set up and execute Annual Tourism Exit Survey 		-	30 000	30 000	30 000	30 000	Valid and reliable tourism survey executed
	<ul style="list-style-type: none"> Survey reporting and communication 	As part of Barometer	-	-	-	-	-	Survey results documented and published
Total 3.2: Strengthen tourism statistics, research and performance measurement			27 000	31 500	31 500	31 500	31 500	

Appendix 1: Profiles and contact list of source markets and segments

Source Markets

Domestic Tourism

Estimating the Size of Sierra Leone's Domestic Tourism market

Currently there are no official statistics that measure the size of Sierra Leone's domestic tourism market for overnight tourism visits or same day excursions. In fact, across sub-Saharan Africa only two countries, South African and Zimbabwe, have consistently reported domestic tourism statistics to the UNWTO over the past five years. Seven other countries have reported data for one or two years, of which three are in West Africa: Cameroon, Nigeria and Senegal.

From this data it can be estimated that 0.03% of Nigeria and Senegal's population take domestic overnight visits each year. If this is equated to Sierra Leone's population of 7.9 million, it can be estimated that 234,000 overnight visits are taken each year.

Types of Domestic Tourists

The majority of domestic tourism can be expected to involve Visiting Friends and Relatives (VFR tourism) which can serve to redistribute expenditure across the country, stimulating additional spend on food and restaurants, activities and some accommodation. Business travel for meeting and conferences will also involve expenditure on overnight accommodation, food and drink.

Leisure travel will comprise primarily middle-income locals and the expat community in Sierra Leone who have medium to high purchasing power. Strategic focus on these travelers will serve to educate locals about Sierra Leone's wealth of tourism assets while helping operators gain experience and develop skills, as well as raising awareness about the benefits of tourism. Focusing on domestic tourism will also help build greater resilience in the country's tourism industry, particularly during the Covid-19 pandemic, while creating a revenue base from which operational and capital investments can be made. Potential domestic tourists are likely to be living in the urban areas and Western region, where households spend more than the national average on goods and services, including on restaurants and hotels. These items are also more likely to be purchased by households headed by women.

However, the potential size of the domestic market is currently small, with only 83,500 households (6.5% of all households) generating an annual income in excess of US \$5,000.⁴⁶

Expatriate Community

There are estimated to be around 10,000 – 12,000 expats living in Sierra Leone with the main nationalities being Lebanese (approximately 5,000), European (about 5,000) and Indians (about 1,000) and a growing Chinese community.⁴⁷

⁴⁶ Sierra Leone Integrated Household Survey (SLIHS) Report, 2018

⁴⁷ Demographics of Sierra Leone, Wikipedia

International Source Markets

The most prolific European travelers to developing countries such as Sierra Leone come from Germany, the United Kingdom and France. Together, they account for almost 50% of European trips to developing countries.

However, it is essential to highlight that European tourism to Africa depends greatly on the political stability of the area, as well as market access. Further, even before COVID-19 lockdowns, demand from Europe was slowing, most notably due to uncertainty surrounding Brexit, geopolitical and trade tensions and the global economic slowdown⁴⁸.

For European travelers particularly, sun and beach holidays are the most sought-after experiences and activities, although niche interests, such as adventure and nature tourism are growing. According to CBI, out of all European tour operators selling nature holidays, almost three quarters (65.6%) offer sun and beach. Wildlife watching, walking, ecotourism and bird watching are also important holiday types.

As the second-largest outbound tourism market in the world, and due to its historic links with Sierra Leone, the USA is an attractive source market for the destination. In 2019, outbound tourists from the US totalled 99.74 million⁴⁹, spending US\$119 billion on international travel in 2017⁵⁰.

A considerable constraint to long-haul travel for the US market, however, is the limited number of vacation days (an average of 10 days annually) and strong work culture. Over half of US citizens' outbound travel is to neighbouring countries, followed by the UK, Dominican Republic, France, Italy and Germany⁵¹.

The US outbound market is also heavily influenced by the country's economic performance, which in turn affects the level of disposable income and affordability of overseas travel. Prior to COVID-19, outbound trips taken by Americans were on the increase thanks to the strong dollar⁵².

The next sections provide detailed profiles and marketing links for Sierra Leone's three priority geographical source markets of Germany, United Kingdom and the United States. They also provide details of the market segments that have the most potential for Sierra Leone in the immediate future.

⁴⁸ UNWTO (2020) World Tourism Barometer 2019. Click [here](#)

⁴⁹ Statista – Number of Outbound Tourists from the US (2021). Click [here](#)

⁵⁰ European Commission (2017) USA: The main traditional international market. Click [here](#)

⁵¹ Ibid

⁵² Skift (2020) Will American Outbound Travel ever be the same? Click [here](#)

Table 1: Percentage of European Tour Operators Active in Nature Tourism Niche Market

Niche market	Definition	Percentage of European tour operators active in this niche
Sun & Beach	Sun and Beach tourism refers to holidays taken for the purpose of staying at or near beaches.	65.6%
Wildlife Watching	Wildlife watching involves viewing wildlife in their natural habitat. It includes different types of safari such as 4x4, walking, fly-in, river/canoe and safaris on horseback. The niche also includes trips to view marine life.	57.7%
Walking	Walking tourism refers to trips in which Walking in the natural environment forms a significant part of the trip. It includes Hiking and Trekking, Long Distance Walking and specialist techniques such as Nordic Walking.	49.8%
Ecotourism	Ecotourism refers to an environmentally based tourism experience that is sustainable, has low impact on the natural environment and helps to preserve the long-term nature of the community/project/site.	42.3%
Birdwatching	Birdwatching is defined as tourist travel for the specific purpose of observing wild birds in their natural habitat. The niche is sometimes referred to as Birding and Avitourism.	37.3%
Fishing	Fishing tourism involves travel away from home for the primary purpose of fishing, in either freshwater or saltwater. Fishing is sometimes referred to as Angling.	13.6%
Cycling	Cycling tourism refers to recreational visits away from home which involve leisure cycling as a fundamental and significant part of the trip. It includes cycling types such as Road Cycling, Mountain Biking and Cycle Touring.	9.3%

Source: CBI, [What is the Demand for Outbound Tourism on the European Market](#) (Updated 2021)

Source Market Information
<p>As the largest country within the EU in terms of population and the largest economy, Germany presents an attractive prospect for Sierra Leone, particularly as the tourism assets offered by the destination are those sought after by the German traveler.</p> <p>In 2019, Germans spent around 1.7 billion days on excursions and longer journeys. This is a slight decrease of 0.5% compared to the previous year. The most popular foreign destinations for Germans were Spain, Italy, Turkey, Austria and Greece in 2019⁵³.</p> <p>Travel is considered a necessity among Germans and is viewed as a means to escape the stresses and routine of every day, and a reward for a year of hard work. Travelling allows them to take a break and return to their lives feeling reinvigorated. Germans also consider travelling a reward, which they indulge and treat themselves to. Being able to travel and see the world fills Germans with a sense of achievement as travel provides them with an opportunity to expand their horizons and gain a deeper understanding of the people and cultures in other parts of the world.⁵⁴</p> <p>German travelers prefer active holidays, nature tourism, sun and beach holidays and are the largest adventure tourism market in Europe⁵⁵. When attracting German tourists, it is important to note that they do not like uncertainty and tend to do a great deal of research before visiting a destination. This requires of Sierra Leone to ensure that the destination's reputation is favorable and that there is sufficient information and detail about the tourism offers.</p>
Characteristics ⁵⁶
<ul style="list-style-type: none"> • Large market of single-person households • Low average number of children per home • Rapid population ageing • Sizeable middle class • Largest demographic segment of travelers aged between 50 and 64 • Take at least one international holiday per year – 33 days of annual leave • Influenced by perceptions of safety, exchange rates, conflict, large-scale events • Germans are very price savvy and look for the best value • Highly digitalized households • Tend to travel as couples, followed by groups of four
Travel Experiences and Activities
<ul style="list-style-type: none"> • For German travelers, the selection of activities is the most important consideration. • They place a high importance on once-in-a-lifetime experiences, feeling pampered and cultural experiences that allow them to gain new perspectives on people and places around the world. • German travelers also actively seek outdoors experiences and are active. • They tend to favor immersive and unique experiences that allow them to expand their horizons.
Travel Decision-Making and Booking
<ul style="list-style-type: none"> • The majority of German travelers decide between two or more destinations in planning.

⁵³ DRV (2019) The German Travel Market Facts and Figures Click [here](#)

⁵⁴ Singapore Tourism Board (2016) STB Market Insights Germany Click [here](#)

⁵⁵ CBI (2019) What is the demand for outbound tourism on the European market? Click [here](#)

⁵⁶ Wesgro (2017) Germany Tourism Market Insights Click [here](#)

- Their main source for early planning⁵⁷, holiday inspiration and planning are friends or relatives who have visited the destination previously, followed by travel or guidebooks, and only then Internet search, reflecting their risk-averse nature.
- While Internet penetration and usage are high in Germany, it is interesting to note that traditional media consumption, i.e., television, radio and print media, continues to be high.
- There is a high reliance on traditional travel channels, such as travel agents and tour operators. A low percentage of travelers book directly on a supplier website, although use of OTAs is increasing.
- Travelling time to a destination is not as critical as travel costs, accommodation and activities amongst the German travelers.
- The most important factors when selecting a holiday destination include safety and security, value for money, world-class nature and aquatic and coastal experiences.
- Marketing channels need to speak to both the sightseeing opportunities as well as the experiences and activities of the destination.

Channels to Reach Market

Tour Operators that sell West Africa

- [Akwaba Afrika](#) Specialist tour operator for Africa, selling several West African destinations.
- [Diamir](#): Offer tours in various locations in West Africa, including a group tour visiting Sierra Leone, Liberia and Guinea.
- [Evaneos](#) Global Tour Operator with a few West African countries on their destination list.
- [Ikarus](#): Offer trips to various locations in West Africa, including Sierra Leone (a 13-day tour around Sierra Leone).
- [Ivory Tours](#): Claim to offer the opportunity to experience Africa away from mass tourism. Offer trips in various West African destinations, not in Sierra Leone.
- [Journaway](#) Global Tour Operator with a few West African destinations offered.
- [Kalahari Afrika](#) Tour Operator offering African destinations, including West Africa. Offer cultural trips to Ghana, Togo, Benin and a 28-day expedition trip from Marrakech to Dakar and the Bijagos Archipelago /Guinea-Bissau.
- [My African World](#): Offer trips in various locations in West Africa, including Sierra Leone (one 7-day round trip to/from Freetown).
- [Naturlich Reisen](#) Group and individual travel options focusing on nature, with several West African destinations offered.
- [Naturlich Afrika](#): Offer trips in various locations in West Africa (Senegal, Benin, Togo/Ivory Coast, Cape Verde) but not in Sierra Leone.
- [Oriental Tours](#) Tour operator offering global destinations, including West Africa.
- [Studienreisen.de](#) Specialist operator offering specialist academic tours to global destinations.
- [World Insight](#): Offer trips to Gambia and Senegal.

Associations

- [Die Reisewirtschaft \(DRV\)](#) – association of tour operators, travel agents and tourism service providers
- [Allianz Selbständiger Reiseunternehmen Bundesverband \(ASR\)](#) – represents medium-sized tour operators and travel agents. ASR welcomes members from international operators that support the goals of the association

⁵⁷ Tourism Australia (2016) Understanding the German Market Click [here](#)

Shows

- [ITB Berlin](#) is the world's leading travel trade show. ITB attracts more than 113,500 trade visitors and 10,000 exhibitors from more than 180 countries
- [E.re.e Die Reise- und Freizeitmesse](#) (Munich) – the largest exhibition for recreation and travel in southern Germany (B2C)
- [GTM Germany Travel Mart](#) (Weisbaden) – the largest workshop for inbound travel professionals for destination Germany (B2B)
- [InterDive](#) (Friedrichshafen and Frankfurt) – trade show specializing in the diving and snorkeling segment (B2C)
- [Reisen Hamburg](#) –travel trade show.
- [TourNatur](#) (Dusseldorf) – travel show for outdoor enthusiasts in the segments of hiking, biking and nature experiences (B2C)

Media

- [fw](#) is a travel-trade publication based in Germany. It covers travel industry news for travel agents and tour operators in the market.
- [INFOX](#) is a German information logistics organization that generates mailings for 15,000 travel agents and tour operators. INFOX can prepare and print mailing, handling most business electronically.

Online Forums

- [Alrad und Fernreisefreunde](#): Facebook group for German travelers to seek travel advice.
- [Reisen in Afrika](#): Facebook group for German travelers seeking travel advice for Africa.

United Kingdom

Source Market Information
<p>With a population of 66 million, the United Kingdom is the second-largest economy in Europe and the fifth-largest economy in the world⁵⁸. A relatively high income per capita, coupled with its strong currency, translated into a historically strong propensity for international travel.</p> <p>As such, travel forms a significant part of the lives of UK travelers. Travelling not only allows them to recharge and escape their daily routine, but also to discover new experiences. While they tend to look for immersive experiences at destinations, hygiene factors such as accessibility, convenience and safety still remain baseline expectations that should not be compromised⁵⁹.</p> <p>UK travelers are also experienced travelers in general. Although short-haul regional trips form the majority of their travel experiences, long-haul international trips remain important but are less frequent and take longer to plan.</p> <p>The UK's recent departure from the European Union and the impact of the COVID-19 lockdown on the British economy is expected to have a significant impact on British consumer spend in the short term. However, the high levels of COVID-19 vaccination amongst the British population and pent-up demand to travel abroad created by extended lockdowns during the pandemic, has created the opportunity for destinations with well managed COVID-19 protocols to attract British travelers.</p>
Characteristics ⁶⁰
<ul style="list-style-type: none"> British passport holders also enjoy one of the highest rates of visa-free travel globally, with a wider range of connections with regional and global destinations, which means there's a fair amount of competition for their attention. Domestic tourism is a very well-established trend in the UK, with 'staycations' gaining in popularity. 7 out of the top 10 outbound markets are within Europe, with Spain ranking as the top destination of choice amongst UK travelers, followed by France. The British traveler enjoys 38 days annual leave. January to March and September to November are peak booking time, while British travelers tend to travel to winter sun destinations between December and March. Competitor destinations to Sierra Leone enjoy majority visitation by British tourists aged between 18 and 44, with the largest group being 25 to 34, reflecting a strong youth market driven by leisure travel.
Travel Experiences and Activities
<ul style="list-style-type: none"> Activities rank amongst the top factors which influences their final decision. Visiting natural attractions and watching wildlife are common activities. The process of learning about other countries' culture allows them to better understand their own culture and to feel more connected to the world. British travelers, therefore, seek immersive experiences to learn about local authentic customs and ways of life, values, etc. which they do not experience at home.
Travel Decision-Making and Booking

⁵⁸ CBI (2019) What is the demand for outbound tourism on the European market? Click [here](#)

⁵⁹ Singapore Tourism Board (2016) STB Market Insights UK Click [here](#)

⁶⁰ Wesgro (2017) United Kingdom Tourism Market Insights Click [here](#)

- Buying travel is a highly considered process for the British traveler.
- Over half start planning their trip with more than one destination in mind, however a high percentage (46%) start their planning with only one destination in mind.
- Africa ranks as the fifth highest region for searches.
- British travelers are digital savvy and spend a significant amount of time engaging with travel-specific content online, via online travel agencies (OTAs).
- OTAs have the most significant reach in the UK and can also play a strong role in influencing destination decisions.
- Following OTAs, travel information sites such as Tripadvisor.com and nationalgeographic.com follow.
- Despite the heavy reliance on online content, traditional media is still an integral part of UK media consumption, including TV (96% watch TV regularly for about four hours a day, 66% listen to the radio at least once a week).
- Family and friends meanwhile rank as a significant offline resource for travelers.
- The top influential factor in destination selection is cost.
- Apart from safety and security, value for money, good food and wine, friendly and open citizens and rich history and heritage play an important role in the destination of choice.
- Additional factors include advice from family and friends, the weather, reviews, activity options and the duration of travel.

Channels to Reach Market

Tour Operators that sell West Africa

- [Africa Travel](#) Tour Operator specialising in Africa with some West African destinations.
- [Dragoman](#): Specialising in Expedition Travel across the world, including trans-Africa.
- [GVI](#): Offer tours in Ghana.
- [Intrepid Travel](#) Specialising in small group travel across the globe.
- [Lupine Travel](#): Offer one Sierra Leone/Liberia tour (10 nights).
- [Madventure](#): Offer Overland tours in truck; several that travel through Sierra Leone (tours range from 3 weeks to 326 days).
- [Native Eye](#) Tour Operator specialising in ‘unusual’ off-the-beaten-track destinations. Offer trips in various locations in West Africa, including tours that pass by Sierra Leone.
- [Naturetrek](#): Different types of tours (birdwatching, butterfly or tiger watching, etc.) in Ghana, Gambia, Sao Tome and Principe.
- [Oasis Overland](#) Expedition travel across Africa, South America and Asia.
- [Overlanding West Africa](#) Specialist West Africa overland travel experts.
- [Oyster Worldwide](#): Offer trips in Uganda and Ghana.
- [Peregrine Adventures](#): Themed travel – both groups and FITs to many destinations, including Africa. Has a distinct adventure focus.
- [Plan My Gap Year \(PMGY\)](#): volunteer abroad organisation, with projects in Ghana.
- [Projects Abroad](#): Offer projects in Ghana and Togo.
- [Rainbow Tours](#): Offer tours in various African destinations, including Sierra Leone (9 or 10-day tours). specialize in tailor-made holidays and small group tours to Africa.
- [Real Gap](#): adventure holidays and gap years in various destinations, including Ghana.
- [Responsible Travel](#) Specialist tour operator focusing on holidays with a sustainable tourism angle, including destinations in West Africa.
- [Tailormade Africa](#): Offer tailormade trips to various locations, including Sierra Leone.
- [The Mighty Roar](#): volunteer projects available in Ghana.
- [Trailfinders](#) Global tour operator including West African destinations.

- [Undiscovered Destinations](#): Small group tours and tailor-made holidays in 60 countries including West Africa.
- [Voyage Jules Verne \(VJV\)](#): provides tours in Benin, Ghana, Sao Tome, Togo
- [Wild Frontiers](#): Specialist adventure tour operator with global destinations, including sub-Saharan Africa, including West African destinations.
- [Wildlife Worldwide](#): Wildlife holidays in various locations in West Africa but not in Sierra Leone.

Associations

- [ABTA – The Travel Association](#): the UK's largest travel association, representing 1,200 travel agents and tour operators.
- [African Travel & Tourism Association \(Atta\)](#): member-driven trade association that promotes tourism to Africa. More than 600 members that include European and UK tour operators listed on the site
- [Association of Independent Tour Operators \(AITO\)](#): travel association for specialist tour operators [listed here](#).

Shows

- [World Travel Market \(WTM\)](#): annual B2B show for the global travel trade hosted in London. WTM attracts more than 50,000 international travel professionals from 190 countries and regions (B2B)
- [Destinations](#) (London, Manchester) and the [Adventure Travel Show](#) (London) are two leading consumer shows aimed at the adventure travel segment, where many leading specialist tour operators have a presence (B2C)
- [Dive Show](#): (Birmingham) annual show aimed at scuba divers, dive operators, resorts and destinations (B2B and B2C)
- [GEM \(Global European Marketplace\)](#): B2B fair for global tour operators and travel buyers
- [Experience Africa](#) B2B travel event bringing together buyers from the UK and Europe with suppliers from Africa.

Media

- The [Travel Trade Gazette \(TTG\)](#): is the UK's weekly travel trade newspaper covering many aspects of the travel trade.
- [Travel Weekly](#): Competitor to TTG offering weekly Travel Trade news.
- [Travel Africa Magazine](#): B2C publication focusing on outbound travel to Africa.
- [Africa Geographic](#): B2C publication focusing on nature-based travel to Africa.

Online Forums

- [Safaritalk.net](#): Online community for wildlife environment communities.
- [Art of Travelling](#): Online community on Facebook spanning the globe, including UK.

- [The Travel Bucketlist](#): Online community on Facebook for travel
- [Africa Travel Community](#): Private Facebook group for Backpackers

United States of America

Source Market Information

The United States has ranked as the world's second-top tourism spender with a robust economy and strong demand for travel⁶¹. The US enjoys a strong domestic market, which stems in large part from its size and the variety of tourist locations on offer in the US, resulting in its residents often choosing to explore their own country instead of travelling overseas. This is exacerbated by the fact that only an estimated third of US residents have passports.

Those who do choose to travel overseas are cultural explorers seeking authentic experiences that provide a clear sense of travelling away from home and immersion in a foreign environment and culture. Important to note that they value good hygiene and modern comforts for their safe and comfortable travel⁶².

Interestingly, the Afro-American market segment holds great potential for Sierra Leone. A study by Mandala Research⁶³ in 2018 suggests that Afro-American travelers hold an economic value of US\$63 billion with cultural travelers being the highest spenders.

Characteristics

- Nearly 80% of trips are for leisure purposes.
- Most trips are undertaken alone or with a partner.
- Peak months for travel are generally between June and August, with a second peak in December.
- Travel costs rank as the most critical component of their decision-making.
- Hotel/accommodation ranked as the second most influential factor, followed by activities.

Travel Experiences and Activities

- As US travelers look for dramatically different cultures and environments in their chosen destinations, they often seek out authentic local experiences that cannot be found in their home country⁶⁴.
- While they are cultural explorers, US travelers prefer to travel safely and comfortably.

Travel Decision-Making and Booking

- Leisure travel planning is influenced by a range of sources and heavily driven by background perceptions of the destination. These beliefs about a particular destination tended to arise from word-of-mouth, often through friends, colleagues, and family members who had travelled to the country⁶⁵.
- US travelers are flooded with information when they plan their travel, tending to turn to several sources to help them decide where to go – 140 travel site visits were recorded for the average US traveler.
- These travelers spend a significant amount of time engaging with travel content online in the research, planning and booking phases.

⁶¹ Wesgro (2017) United States: Tourism Market Insights. Click [here](#)

⁶² Singapore Tourism Board (2016) STB Market Insights United States of America. Click [here](#)

⁶³ Globe Newswire (2018) African American Travel Represents \$63 Billion Opportunity. Click [here](#)

⁶⁴ Singapore Tourism Board (2016) STB Market Insights United States of America. Click [here](#)

⁶⁵ Ibid

- 35% of US travelers are still considering multiple destinations when they start their travel booking journey, which is normally three to six months prior to travel.
- Search engines and recommendations from friends and family rank on top when travelers start searching for information. When booking, US travelers use OTAs, airline sites and hotel sites.
- US travelers also relied on traditional travel agents for information, especially when planning to travel to a destination with relatively poorer infrastructure
- The most important factors when selecting a holiday destination include safety and security, hygiene and modern comforts, nature and wildlife, food and wine, value for money, and friendly and welcoming locals.

Channels to Reach Market

Tour Operators that sell West Africa

- [Across Africa Tours](#): Offer 2 short tours in Sierra Leone as well as multiple other West African destinations (half-day or full-day trips).
- [Adventure Life](#) Specialist adventure travel operator featuring West African destinations
- [Adventures Abroad](#) Global tour operator, with West Africa destinations featured
- [Africa Discovery](#): Organises overland expeditions.
- [Chalo Africa](#): Wildlife holidays in Gabon and other African destinations.
- [Continent Tours](#) Specialist Tour operator for Africa - including West African travel
- [Explore!](#) Experts in adventure travel, with global program.
- [G Adventures](#) Head office in Canada, but based globally. Small group tours with soft adventure, nature and socio-economic contribution at its core.
- [GeoEX](#) Tour operator featuring unusual destinations and authentic cultural experiences
- [Go Eco](#): Volunteer abroad programs in Ghana and Cape Verde amongst other African destinations.
- [Go Volunteer Africa](#): Volunteer abroad program in various locations in West Africa, including Sierra Leone (Child care or teaching volunteer projects).
- [Goway](#) Offices in both USA and Canada – comprehensive Africa program.
- [Journeys International](#): Offer adventure tours in Ghana, Togo and Benin.
- [Kensington Tours](#): Offer tours in Ghana and Senegal.
- [Land Tours](#) Specialist West African Tour operator – has diaspora tours
- [Original World](#) Group tours, including West African kingdoms tour
- [Palace Travel](#) Specialist Africa tour operator
- [Wilderness Travel](#): Offer tours in Ghana, Benin, Togo and other African destinations, but not Sierra Leone.

Associations

- [Adventure Travel Trade Association \(ATTA\)](#) is a community of more than 1,300 tour operators, tourism boards, speciality agents and accommodation providers from 100 countries.
- [African Tourism Association](#) Global Trade Association promoting travel and tourism to Africa.
- [Association for the Promotion of Tourism to Africa](#) A Non-profit, volunteer association of travel professionals promoting Africa.
- [ASTA](#) American Society of Travel Agents is the umbrella association looking after the interests of the travel agency community in the USA.

Shows

- [Travel Adventure Show](#) B2C shows held across the USA with a focus on adventure and travel
- [IPW](#) Pow Wow as it is referred to – B2B show for global travel professionals.
- [New York Times Travel Show](#) B2C show held annually to promote global travel.

Media

- [Travel Weekly](#) a weekly Travel Trade publication for US-based tour operators and travel agents. Run news on Africa.

Online Forums

- [National Geographic Wild](#) Private Facebook Group focused on exposing the hidden nature of the world.
- [Travel Divas](#) Private Facebook group focused on the shared travel experiences of black women.
- [Travel Addicts Life](#) Facebook Group for travel lovers – global destination focus.
- [Lonely Planet Travelers Group](#) Private Facebook Group for Lonely Planet community.
- [Must Do Travels Group](#) Private Facebook group for adventure seekers in the US and Canada.
- [Fodor's](#) Online forum for travelers hosted by guidebook writer, Fodors.
- [Rick Steves Travel Forum](#) Online forum hosted by Rick Steves, but crowdsourcing responses.

Tourism Market Segments

Adventure Tourism

Segment Description and Profile

Adventure tourism is one of the fastest growing tourism segments and is defined as a tourism trip that includes at least two of the following elements - physical activity, the natural environment and cultural immersion. Depending on the traveler or group, a trip can comprise a variety of 'hard' and 'soft' outdoor adventure activities alongside cultural activities, e.g. wildlife watching, surfing, trekking and cultural activities such as engaging with local communities.

Adventure tourism and ecotourism often overlap as both rely on the preservation of pristine natural habitats and meaningful cultural experiences. Therefore, providers of tourism experiences in both segments adopt sustainable principles that minimise negative impacts and increase benefits to local communities. During the Covid pandemic, consumer desire for sustainability and ensuring local people benefit from tourist spend has become increasingly important. Other types of responsible tourism that overlap with adventure are community-based tourism (CBT) and volunteer tourism, which is one element of SAVE tourism (Scientific, Academic, Volunteer and Educational)⁶⁶.

Adventure tourism is an effective driver of entrepreneurship, employment and economic advancement for women, youth and rural communities. It fosters environmental awareness and a sense of stewardship over the natural and cultural assets that initially attract adventure tourists. This makes it an attractive tourism sector for developing economies.

The adventure tourism segment is lucrative for destinations. The Adventure Travel & Trade Association (ATTA) reported an average trip price costs US\$3,000 per person with 74% of trip costs spent with local suppliers and an average of US\$206 spent on local handicrafts and souvenirs⁶⁷.

There is a broad range of adventure traveler type within the segment, ranging from hardcore adventurers who focus on their chosen activity, to soft adventurers that get involved in multiple activities from a relatively comfortable or safe base. These can also be defined more precisely as Intrepid and Mature Explorers.

Adventure Tourism in Sierra Leone

There are many sub-segments within the Adventure Tourist demographic. Those of most interest to Sierra Leone are the Intrepid Explorers, Adventure Activity Enthusiasts, Ecotourists, Mature Explorers and Luxury Explorers.

The **Intrepid Explorer** has been identified as a key market segment for Sierra Leone to target in the immediate future.

Intrepid Explorers are characterised by their desire to explore unvisited destinations 'off the beaten track'. They expect and enjoy the aspect of travelling under basic conditions, staying in local accommodation, using public transport over long distances, eating local food and pushing the boundaries of their comfort zone for a truly immersive and adventurous experience. They value on-the-ground expertise and local, first-hand knowledge to ensure they receive authentic experiences that match their needs. They enjoy a variety of soft and hard adventures whilst on a trip and 'expect the unexpected'. Intrepid Explorers tend to be budget conscious but have more time to spend travelling than other adventure tourists. They spend less on services and more on actual experiences and activities. They are

⁶⁶ [CBI The European Market Potential for Adventure Tourism 2021](#)

⁶⁷ [ATTA Adventure Travel Trends Snapshot](#), December 2020 (recap of 2019)

also more likely to be Fully Independent Travelers (FITs)⁶⁸ who conduct their own research online and actively seek recommendations from family and friends. FITs typically make their own travel arrangements such as booking flights, accommodation and trips/experiences directly with **local operators** or Online Travel Operators (OTAs).

However, in less-travelled destinations like Sierra Leone where infrastructure is more challenging, Intrepid Explorers may also consider travelling with an experienced tour operator that can help them navigate some of the more difficult aspects of the trip.

Being the first in their peer group to visit a destination and engaging in sustainable travel are important to an Intrepid Explorer. Special interests may include historic sites, adrenaline and outdoor sports activities, festivals and events.

In the longer term, as the range and quality of accommodation and experiences improves, the **Mature Explorer** segment will be a priority segment for Sierra Leone.

Mature Explorers also want to travel off the beaten track to experience unique and exceptional attractions that are cultural and natural, but that are less challenging and less personally risky. They require more comfortable accommodation that is clean, food that has been safely prepared, and prefer custom travel methods. They are typically cash rich but time poor and are more likely to arrange a trip using a tour operator or OTA. They will spend money on both tourism services and the actual experiences/activities that they choose to do.

Travel Behaviour

The broad segment of Adventure travelers are generally younger than their non-adventure travel counterparts, aged between 29 and 60, and predominantly female (53%), travelling mostly in couples, especially in Africa, with a growing number of single travelers.

Very importantly, these adventurous travelers are expected to be one of the first market segment to start travelling again as Covid restrictions ease.

It is estimated that around 56% of adventure travelers handle all arrangements on their own without the use of professional services⁶⁹. However, in line with a global trend for personalisation in travel, custom itineraries within the adventure travel segment are experiencing high consumer demand⁷⁰.

Adventure travelers are typically highly educated and prolific consumers of traditional and new media and spend over six hours a day reading social media, blogs and online sites⁷¹.

Their key motivations for travelling include exploring new places and discovering exciting new activities and although they are more likely to use the professional service of guides, instructors, specialist tour operators or other services, they are also comfortable with sourcing their own information online.

Their destination choices are influenced predominantly by family and friends, review-websites and travel magazines, and travel with their partners and families⁷².

Product Requirements

When choosing a destination, adventure travelers look for a pristine, natural environment, a good range of outdoor activities to take part in and interesting local cultures to explore. Sustainability is important to them and they like to know their activities will have minimal negative impact on the environment yet a positive contribution to local communities.

⁶⁸ [CBI Entering the European Market for the FIT Segment 2020](#) *update due for publication in September 2021

⁶⁹ [UNWTO/ATTA Global report on Adventure Tourism \(2014\)](#).

⁷⁰ [ATTA Adventure Travel Trends Snapshot](#), December 2020 (recap of 2019)

⁷¹ [What Kind of Adventure Traveler Are You? \(2014\)](#)

⁷² Ibid.

Adventure Tourism Activities in Sierra Leone

Sierra Leone offers a good adventure tourism product and there several activities and destinations that are likely appeal to Intrepid Explorers:

- Hiking and trekking – Mount Bintumani, Wara Wara, Kenema Hill mountain circuit
- Birding – National Parks, Tiwai Island, coastal locations
- Wildlife Watching – Tacugama, Tiwai Island, National Parks, marine wildlife sites
- Surfing – Bureh Beach Surf Club; (combine with Liberia’s surf destination Robertsport)
- Sport Fishing – Bonthe, Turtle Islands
- Culture – community-based tourism, West African and ‘Salone’ heritage, colonial past

Marketing to Adventure Tourists

Adventure travelers are typically savvy tourists who spend time researching and planning their ideal experiences. They are more likely to prepare for a trip prior to leaving, relying on Internet research and consulting with friends and family, and recommending trips by posting on social media sites⁷³.

They also read special-interest publications such as [National Geographic](#), [National Geographic Traveler](#), [Adventure Travel Magazine](#), [Wanderlust](#) and [Adventure World Magazine](#), among others.

The high proportion of adventure travelers doing online research emphasizes the importance of maintaining a strong web presence and having a strong online marketing strategy on the most appropriate social media platforms. As highly engaged users of social media themselves, adventure travelers can also be important promoters for destinations and activities, recommending travel to their friends and family through social media and posting reviews online.

Tour Operators that sell West Africa (April 2021)

Those in italics were contacted in 2021 and would like to be involved with future NTB marketing activities.

- Australia
 - [***Intrepid Travel***](#): B Corporation offering adventure tourism tours worldwide. Doesn’t offer trips to, but to Benin, Gambia, Ghana, Senegal, Togo (tailor made to Sierra Leone from US).
- Belgium
 - [**Emotion Planet**](#): Offer different tours by themes in destinations worldwide. Offers trips to Benin, Burkina Faso, Ghana, Senegal, Togo.
- Canada
 - [***Adventures Abroad***](#): National Geographic named them one of the best adventure travel companies. Focus on small groups (maximum 18 participants per tour). West Africa Tour package.
 - [***Goway***](#): selling all types of trips in destinations across the world.
- Denmark
 - [**Penguin Travel**](#): Leader on the Scandinavian as well as the Bulgarian adventure travel markets. Offices throughout Scandinavia
 - [**Viktors Farmor**](#): Pioneer Travel; offers trips in Benin, Ghana, Togo
- France
 - [**Allibert Trekking**](#): Trekking, hiking, biking and safari tours around the world. Offers trips to Senegal, not in Sierra Leone.
 - [**Intermedes**](#): Offering all kind of tours, focused on culture. Offers trips to Senegal.

⁷³ Ibid.

- [La Balaguere](#): Hiking and biking tours worldwide. Offers trips to Guinea.
- [Les Maison du Voyage](#): Soft adventure trips in Benin, Senegal, Togo
- [The Outsiders](#): *Tailor made trips to various locations around the world and in West Africa, including Sierra Leone.*
- Germany
 - [Akwaba Afrika](#): *Offer trips in various West African destinations, but not Sierra Leone.*
 - [Diamir](#): *Offer tours in various locations in West Africa, including a group tour visiting Sierra Leone, Liberia and Guinea.*
 - [Ikarus](#): *Offer pioneer trips to various locations in West Africa, including Sierra Leone (a 13-day tour around Sierra Leone).*
 - [Ivory Tours](#): *Claim to offer the opportunity to experience Africa away from mass tourism. Offer trips in various West African destinations, not in Sierra Leone.*
 - [Journaway](#): Offer trips in Senegal, Gambia, Ghana.
 - [Kalahari Afrika](#): *Offer cultural trips to Ghana, Togo, Benin and a 28 expedition trip from Marrakech to Dakar and the Bijagos Archipelago / Guinea-Bissau.*
 - [My African World](#): Offer trips in various locations in West Africa, including Sierra Leone (one 7-day round trip to/from Freetown).
 - [Natürlich Afrika](#): Offer trips in various locations in West Africa (Senegal, Benin, Togo/Ivory Coast, Cape Verde) but not in Sierra Leone.
 - [World Insight](#): Offer trips to Gambia and Senegal.
- Italy
 - [African Explorer](#): Offer trips to Senegal, Togo, Benin and Ghana
 - [Go Afrique](#): *Offer tours to various destinations in West Africa, including Sierra Leone (one tour only in Sierra Leone and one visiting Liberia and Guinea as well).*
 - [Kanaga Adventure Tours](#): *Operates pioneer travel to various location in West Africa; including Sierra Leone (some tours visiting neighbouring country Liberia and Guinea as well).*
- Netherlands
 - [Atuu Travel](#): Offer tours in Ghana.
- Poland
 - [Alco Tours](#): Offer trips to Africa.
- United Kingdom
 - [Africa Travel](#): Offer tours in Sao Tome and Principe.
 - [GVI](#): Offer tours in Ghana.
 - [Lupine Travel](#): *Offer pioneer travel with one Sierra Leone/Liberia tour (10 nights).*
 - [Madventure](#): Offer Overland tours in truck; several that travel through Sierra Leone (tours range from 3 weeks to 326 days).
 - [Native Eye Travel](#): *Offers pioneer trips in various locations in West Africa, including tours that pass by Sierra Leone.*
 - [Naturally Africa Volunteers](#): Offer tours in Ghana.
 - [Naturetrek](#): *different types of tours (birdwatching, butterfly or tiger watching, etc.) in Ghana, Gambia, Sao Tome and Principe.*
 - [Oyster Worldwide](#): Offer trips in Uganda and Ghana.
 - [Rainbow Tours](#): *Offer tours in various African destinations, including Sierra Leone (9 or 10-day tours). Pioneers of responsible travel, Rainbow Tours specialize in tailor-made holidays and small group tours to Africa.*
 - [Real Gap](#): Adventure holidays and gap years in various destinations, including Ghana.
 - [Tailormade Africa](#): *Offer tailormade trips to various locations, including Sierra Leone.*
 - [Voyage Jules Verne \(VJV\)](#): Provides tours in Benin, Ghana, Sao Tome, Togo
 - [Wild Frontiers](#): Offer tours in Benin and Togo
 - [Wildlife Worldwide](#): Wildlife holidays in various locations in West Africa but not in Sierra Leone.
- USA

- [Across Africa Tours](#): Offer 2 short tours in Sierra Leone as well as multiple other West African destinations (half-day or full-day trips).
- [Africa Discovery](#): Organises overland expeditions.
- [Chalo Africa](#): Wildlife holidays in Gabon and other African destinations.
- [GAdventures](#): small group adventure travel
- [GeoEx](#): Offer one trip to West Africa, from Benin to Togo and then Ghana.
- [Journeys International](#): Offer adventure tours in Ghana, Togo and Benin.
- [Kensington Tours](#): Offer tours in Ghana and Senegal.
- [Land Tours](#): Offer tours in various West African destinations but not Sierra Leone.
- [Wilderness Travel](#): Offer tours in Ghana, Benin, Togo and other African destinations, but not Sierra Leone.

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- *Adventure Travel Associations and Clubs*
- [Adventure Travel & Trade Association \(ATTA\)](#): A global network of adventure travel leaders, including guides, tour operators, travel advisors, destination marketing and management organisations, and travel media.

- *Adventure Travel Shows and Fairs*
- [Destinations Show](#): The UK's largest and longest-running consumer travel event for holiday inspiration. Exhibitors include independent travel brands, tour operators and tourism boards.
- [Adventure Travel Show](#): (London) consumer show aimed at the adventure travel segment

- *Online Forums and Publications*
- [Outside Magazine](#): includes TV (can be watched live), podcasts, and written content about outdoor activities.
- [Adventure Travel News](#): the Adventure Travel Trade Association news page.
- Lonely Planet Forums:
 - [Trekking & Mountaineering](#)
 - [Wildlife & Nature](#)
 - [On Your Bike](#)
 - **And other interest forums [here](#).**
- Instagram is an important source of information for young adventure travelers. Make sure to use the location tag on every post so they can be found easily.
- On social media, use hashtags such as #wanderlust, #adventureseeker, #goexplore, #openmyworld, #wonderfulplaces, #roamtheplanet, #adventuretime, #africanadventure, #africanadventures

American African Diaspora

Segment Description and Profile
<p>African American travel represents a growing \$63 billion opportunity for destinations, according to a 2018 study from Mandala Research⁷⁴. African American culture and history play a key role in selecting a destination for this segment. In the Mandala study 64% of cultural travelers indicated that the availability of African American cultural and heritage attractions is very important when planning leisure trips. Cultural travelers within this segment are also the highest spenders, on average spending 55% more compared to all African American travelers.</p> <p><i>American African Diaspora Tourism in Sierra Leone</i></p> <p>In the USA, Sierra Leone is the most frequent result for DNA tests⁷⁵ and in 2019 Ghana’s high-profile ‘Year of Return’ raised awareness of West African roots heritage destinations in North America.</p> <p>For Sierra Leone, the African American Diaspora market segment represents visitors who are seeking connection and a ‘return to their roots’ in this West African nation. They are drawn to learn about their heritage through the compelling story of provenance and symbolism as a nation settled by freed and free-born black people in the mid-1800s. In search of authentic experiences and engagements, this is a good first-mover segment for catalysing cultural tourism (e.g., slave heritage sites, festivals, performances, etc.).</p>
Travel Behaviour
<p>The African American Diaspora traveler segment is a large, diverse group. It comprises different age groups who may be luxury, adventure and/or cultural travelers, members of the LGBTQ+ community, and much more. Each of these travelling types have different needs that must be met. However, one shared commonality is the desire to feel comfortable and safe when travelling. This is a top priority and has historically led African American Diaspora travelers to travel in groups for camaraderie and to some extent for protection⁷⁶.</p> <p>African American Millennials are less likely to travel in groups but also show a greater interest in destinations that are perceived to be ‘welcoming’ and, in some cases, to which they feel a connection.</p>
Product Requirements
<p>African American Diaspora travelers select destinations and travel products with great intentionality to ensure that they are inclusive experiences that resonate with them—whether it be a luxury, adventure, or cultural experience.</p> <p><i>American African Diaspora Activities in Sierra Leone</i></p> <p>For Sierra Leone, travelers within this segment are likely to seek historically significant sights and attractions that tell the story of Sierra Leone’s provenance. They value connection with locals and a behind-the-scenes glimpse into life in Sierra Leone, past and present. There is a greater interest in cultural events, festivals and museums than perhaps in other segments. Other important requirements are safety and a feeling of comfort, good quality food, and shopping.</p> <p>Key sites are identified as:</p> <ul style="list-style-type: none"> • Bunce Island, Tasso Island • Colonial heritage in Freetown • Hilltop towns of Regent and Leicester • Plantain Island, Sherbro Island and Turner’s Peninsula for a sense of where the slave trade once thrived

⁷⁴ Mandala Research (2018) The African American Traveler Report. Click [here](#)

⁷⁵ Joseph Opala, James Madison University, The Gondobay Manga Foundation Click [here](#)

⁷⁶ Ibid

Marketing to American African Diaspora

Representation is extremely important to ensure that marketing resonates with African American Diaspora travelers. Mainstream media and traditional travel marketing on television and in magazines have historically underrepresented black voices and interests. Travel marketing originating from black voices, writers, and advisors is so important because the travel experience is inextricably linked to the identity and perspective of the traveler.

Marketers must also look at the channels through which they intend to reach the African American Diaspora traveler. The lack of representation in mainstream travel media has led many within this segment to turn to social media where it's easier to find images and content that reflect what black travelers want to see.

Word-of-mouth travel recommendations, both in social media and 'real life' groups (e.g., church congregations, university alumni associations, community organizations, etc.) are often deemed reliable and pre-vetted by travelers who share not only interests but also perspectives and importantly, concerns around how they'll be welcomed when visiting a new destination.

Specialist tour operators are often employed for diaspora tours focusing on former slave trade history in West Africa.

- *Trade Shows*
- **Audacity Fest**: first festival in the US targeting millennial travelers of color.

- *Online Forums, Associations and Publications*
- **Nomadness Travel Tribe**: an award-winning travel lifestyle brand with a network of influencers and innovators.
- **Travel Noire**: digital media company creating inspiring travel content for millennials of the African Diaspora.
- On social media, use hashtags such as #travelnoire, #melaninjournney, #melanintravel, #blackandabroad, #africanhistory, #blacktravel, #blacktraveljourney, #blacktravelfeed, #blackcommunity, , #blacktravelers

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- *Tour Operators*
- **Africa With Us**: offers a series of packages named **Diaspora Treks** targeting black women who wish to visit destinations from where their ancestors may have originated or been taken to, including Jamaica, Brazil, Ghana and Georgia (USA).
- **Ashanti African Tours**: West African's Premier travel company.
- **Black & Abroad**: multi-platform travel and lifestyle company that curate experiences for Black travelers; **Go Back to Africa** campaign.
- **Bouyant**: organiser of events, group trips and a private members' club for black travelers.
- **Global Linkages**: management consulting firm that organises customised tours and fair trade opportunities for US travelers in Africa.
- **Spector Travel**: offers **roots and culture tours** of former slave trade routes in West Africa.
- **Tastemakers Africa**: travel experience marketplace for black travel group tours and experiences hosted by locals in Africa.

- **Travelling Black:** tour operator connecting diaspora to 100 different countries.
- **Urban Events Global:** travel company providing tours for African American adventure seekers; currently Cape Town is the only trip in Africa.

SAVE (Scientific, Academic, Volunteer and Educational) travelers

Segment Description and Profile

The SAVE tourism segment comprises four profiles of scientific, academic, volunteer and educational tourism. Volunteering and Educational profiles are the largest segments within this niche market.

The SAVE segment is dominated by young travelers from high school age through university/college and beyond, to young professionals. The sector is characterized by learning for personal or professional reasons and there are similarities between each of the profiles.

Globally, there has been enormous growth within the SAVE travel industry⁷⁷ and the global market is dominated by European SAVE tourists⁷⁸.

The range of SAVE projects is large and diverse and include animal welfare and conservation, biological research, construction, disaster relief, healthcare, internships, learning (languages, cooking, cultural, handicrafts etc.), marine conservation, school trips, scientific/biological/nature research, studying abroad, teaching (English, sports coaching) and women's empowerment.

The profiles⁷⁹ of SAVE are further defined as follows:

- *Scientific Tourism*

Scientific Tourism helps destinations with knowledge and support to protect the environment, fostering global development and positively impacting communities. Travelers come from research institutions, universities, non-profit organizations and medical organizations, and are looking for ways to advance science and help with the acquisition of knowledge about the world.

Scientific research usually takes time and travelers in this profile tend to stay longer and have a greater economic footprint. They also tend to hire local workers, live in the communities, eat local food, use local transportation and buy local goods which in turn leads to positive economic impacts in surrounding communities.

- *Academic Tourism*

This encompasses travel by professors, researchers and students for academic purposes, including studying abroad programs, thesis research, visiting scholarships, school trips and academic exchanges.

Academic travel often includes learning activities that contribute to credit for formal degree programs or courses offered by higher education institutions. They often visit remote places in the interest of study and are more willing to interact with local communities. They do not usually require sophisticated facilities and services.

The Scientific and Academic profiles are similar, with participants often travelling in larger groups over longer periods of time which brings positive economic benefits to local communities. The presence of such groups can also help to raise awareness on the importance of a destination's assets along with its profile.

⁷⁷ [USAID \(Date Unknown\) SAVE Travel Connecting Responsible Travelers with Sustainable Destinations](#)

⁷⁸ Allied Market Research (2019) SAVE Tourism Market by Type. Click [here](#)

⁷⁹ [CBI The European Market Potential for SAVE Tourism 2020](#)

- *Volunteer Tourism*

Also known as ‘voluntourism’, volunteer travel is often linked to personal or professional development, with individuals and groups participating in activities that support local communities. The most popular volunteer activities include wildlife and environmental conservation, community tourism projects and community development including working with children and teaching.

Volunteers often spend a long period of time at the destination without needing sophisticated facilities or services. Depending on their background and skills, they can also contribute to the capacity building of local communities and other stakeholders, as well as help with product development, physical improvement of areas, and other elements of developing destinations.

There is strong interest in voluntourism all over the world and many African countries are popular choices – Ghana and South Africa are among the top destinations. Although many voluntourists were interested in travelling abroad for over a month, affordability is important. Voluntourists are also concerned about where their money is being used.

- *Educational Tourism*

Educational tourism is concerned with undertaking learning experiences with opportunities for self-improvement, job development, career enhancement, self-actualization, or acquiring new or improving knowledge. Activities includes language courses, traditional craft workshops, experienced-based learning and school trips, among others.

These individuals or groups travel to enhance their personal knowledge, rather than for academic credit. They tend to stay longer and spend more on value-added activities, which directly benefits the local community.

SAVE Tourism in Sierra Leone

The profiles that offer the greatest potential for Sierra Leone are research programs for Scientific and/or Academic purposes, along with Volunteers.

However, younger volunteers on ‘gap years’ between school and university will require a greater reassurance of safety provision. Many may be travelling overseas for the first time by themselves, and their parents are likely to play a significant role in influencing the choice of destination that is perceived to be safe for their child. Currently, Gap Year providers find Sierra Leone a difficult destination to sell to volunteers, particularly given the proximity to Ghana, the leading destination for SAVE tourism in West Africa which is well established in the sector.

Travel Behaviour

The SAVE market is dominated by younger travelers, particularly the Millennial/Generation Y and Generation Z consumer groups, aged between 18 and 41 today. This large travelling group is especially motivated by experiential travel that makes a positive contribution to the places visited (or conversely has a minimal negative impact) whilst also enjoying a personally fulfilling trip.

SAVE travelers also place high value on the natural, social and cultural assets of the place they visit and adhere to the principles of sustainable tourism. A lack of development can be an attraction on its own right, as ‘off-the-beaten-track’ unique experiences are highly sought after.

For destinations with underdeveloped infrastructure and limited tourism expertise, SAVE travelers can play an important role in nurturing tourism development. They also travel year-round, which makes them a valuable market for extending the tourist season and increasing visits and local expenditure during the low season.

SAVE travelers also enjoy being immersed within local communities and/or activities in peri-urban and rural areas, ensuring that the economic benefits and opportunities generated by this form of travel are more broadly distributed than those that arise from mass tourism.

Product Requirements

While they are quite tolerant, SAVE travelers do expect a minimum level of safety and security, as well as access to basic medical facilities. There must also be adequate transportation networks to bring tourists to and from the destination. Finally, a favorable regulatory environment, e.g., visa regulations, volunteer regulations, etc., must exist.

SAVE travelers need a compelling reason to choose a destination, choosing to travel with a purpose, whether to further scientific knowledge, enhance their education, volunteer to help others, or some other way of travelling to do good.

The Scientific niche can be targeted by creating a guide that details the scientific tourism offer in Sierra Leone. It should include profiles of potential hosts agencies or private organizations that are eager to work with researchers and partners, providing sources of information and local connections for SAVE travel initiatives.

- ***SAVE Projects in Sierra Leone***

There is a good range of activities that would be suitable for the SAVE traveler market.

- Volunteers: community development such as teaching, coaching sport and working with children; construction projects; wildlife monitoring, rehabilitation, conservation and sanctuaries; marine projects
- Academic/Scientific Research: student exchange, conservation, tracking, monitoring (chimpanzees, pygmy hippos)

Marketing to SAVE Tourists

SAVE tourism online forums

- **GoAbroad**: A platform to search, review and compare international programs, including study abroad, volunteer abroad, intern abroad, teach abroad and degrees abroad programs.
- **Study Abroad**: Study, intern, volunteer or teach abroad, they offer a wide range of programs worldwide, but none in Sierra Leone yet.

Volunteer Travel Organizations and Operators

- **A broader view**: Voluntourism operator with programs in Africa, including Ghana.
- **Cross Cultural Solutions**: Voluntourism operator with programs in Africa, including Ghana, also offers high school and gap year programs.
- **ELI Abroad**: Voluntourism operator with programs in Africa, including Ghana.
- **Globe Aware**: Voluntourism operator with programs in Africa, including Ghana.
- **Go Volunteer Africa**: Volunteer abroad program in various locations in West Africa, including Sierra Leone (Child care or teaching volunteer projects).
- **GoEco**: Voluntourism operator with programs in Africa, including Ghana.
- **GVI SA**: Voluntourism operator with programs in Africa, including Ghana.
- **Health Volunteers Overseas**: Voluntourism operator focusing on healthcare professionals.

- [International Volunteer HQ](#): Voluntourism operator with programs in Africa, including Ghana.
- [Peace Corps](#): Offers volunteer programs worldwide for American citizens aged 18+
- [Plan My Gap Year \(PMGY\)](#): Volunteer abroad organisation, with projects in Ghana.
- [Projects Abroad](#): Voluntourism operator with programs in Africa, including Ghana.
- [SAVE Travel Alliance](#): (USA) a network designed to connect responsible travelers to sustainable destinations, which also provides information on how to create travel experiences.
- [Street Child](#): Partnering with local organizations, they educate children and empower local families.
- [The Mighty Roar](#): volunteer projects available in Ghana.
- [Volunteer World](#): Volunteer abroad projects worldwide, but only in Ghana and Cape Verde for West Africa.
- [Volunteers for Peace](#): Voluntourism operator with programs in Africa, including Togo.
- [VSO](#): Offers youth volunteer (from the United Kingdom), professional volunteer and corporate volunteer programs.
- [WWOOF](#): is a worldwide network of organizations in 132 countries that offers travelers the opportunity to live, work and learn in an organic farm in another country.
- [WYSE Travel Confederation](#): Global not-for-profit membership organization representing youth, student and educational travel industry. Networking events.
- [YearOutGroup \(YOG\)](#): UK based association of approved gap year providing organizations and travel programs for students, career breaks, volunteers

Educational Travel

- [EXPLORE INC](#): US-based tour operator focusing on educational tours, with Africa program.
- [Smithsonian Journeys](#): Rich culture and natural sciences focus for niche tours.
- [World Strides Educational Student Travel](#): US-based school programs including travel to Africa.

Scientific and Academic Travel

- [Scientific Tourism](#): Wonder Seekers' Facebook page.
- [Wonder Seekers](#): an initiative from SCITOUR to develop and market scientific tourism products. The site is still under construction.

Academic tourists will tend to look for the quality of education offered compared to home and the international recognition of qualifications when choosing a destination (students studying abroad for example). Consider promoting some of your universities' successes and achievements in the international press and on social media. Partnerships with universities worldwide may also help raise awareness of academic tourism in Sierra Leone.

- Use hashtags on social media: #studyabroadadventures, #studyabroad, #studyabroadlife, #studyabroad2021, #studyabroadbecause

Outdoor Adventure and Ecotourism Niche Markets

Bird watching

Niche Market Description and Profile
<p>Increasingly bird watchers, birders or avitourists as they are sometimes referred to, travel to long-haul destinations to spot new bird species they cannot see in their own region. Birders are categorized as follows⁸⁰:</p> <ul style="list-style-type: none">• <i>Casual birders</i> – represent an estimated 40% of the bird watching market, this group is interested in outdoor and nature-based activities such as hiking and wildlife watching. They are likely to be keen on taking part in birding as an additional activity.• <i>Enthusiastic birders</i> – account for around 50% of the market, they love both birds and nature and usually have a good knowledge of the destination they are visiting. Roughly equally male and female, Enthusiastic birders like to relax and take part in other activities, such as culture, and spend more on birding tours.• <i>Hardcore birders</i> – represent about 10% of the bird watching market and are predominantly male. They are dedicated bird watchers that want to see as many birds and endemic species as possible on one trip and are prepared to travel long distances to do so. Hardcore birders are less interested in doing other activities on the same trip. <p>Bird watchers are described as educated, wealthy and conservation-supporting. These tourists also have a high potential to contribute to local communities, educate locals about the value of biodiversity and create local and national incentives for the preservation of natural areas.</p> <p><i>Bird Watching Tourism in Sierra Leone</i></p> <p>Home to at least 640 bird species, Sierra Leone has a superior birding product and there is good potential to attract more birders. The country is rich in West African birds, including Upper Guinea Forest endemics and its national bird is the white-throated bee-eater.</p> <p>Sierra Leone features on the itineraries of a small number of specialist birding operators and is generally considered to be an ‘adventurous birding tour’. Birders to Sierra Leone are a combination of Enthusiastic and Hardcore birders, but casual birders are also likely to be interested to be tempted by well-organized birding experiences.</p>
Travel Behaviour
<p>Around three million international trips are taken for the purpose of bird watching every year⁸¹. The largest birding markets are the US and the UK, along with the Netherlands and Germany.</p> <p>Casual and Enthusiastic birders use a mix of channels for arranging their trips, including specialist, adventure and general tour operators that usually, but not always, include other activities within the trip. Independent travelers that make their own travel arrangements also book directly with local birding tour operators or online travel agents.</p> <p>Hardcore birders have specific needs and are more likely to travel with a specialist guide who is either the tour operator or contracted to the operator. They are more likely to travel to remote locations to view unusual or rare birds.</p>
Product Requirements

⁸⁰ CBI [Entering the European Market for Bird Watching Tourism Products 2021](#)

⁸¹ CBI [The European Market Potential for Bird Watching Tourism 2021](#)

Operating under sustainable principles and adhering to conservation in tourism practices are essential for birding travel products. Birders are often more concerned about these issues than other groups of visitors as the very nature of bird life is linked to the preservation of habitats and bird species.

Birder friendly accommodation and facilities, along with knowledgeable guides who know the best places to view birds and can bring the experience to life are also essential. Guides that speak English to a good level are recommended.

Birders have rated the following as their top considerations for selecting one bird watching destination over another:

1. Accessible walking trails
2. Information about birds and lists
3. Time in bird hides
4. Time on boardwalks to enjoy views
5. Extended tours to visit other places

Bird Watching Destinations and Activities in Sierra Leone

Best areas to view birds are:

- Western end of the Upper Guinea Forests Endemic Bird Area (although logging activities have fragmented the area making it more difficult to visit)
- River Number Two on the Peninsula
- Mamunta-Mayosso Wildlife Sanctuary, Northern Province
- Loma Mountains National Park
- Gola Rainforest National Park
- Tiwai Island Wildlife Sanctuary

Marketing to Bird Watchers

Birders are likely to be members of local or national bird organizations like the [RSPB](#) (UK) and [BirdLife International](#) (USA). They will consult birding books, magazines and other publications to research their trips, and join birding forums to share experiences and recent sightings.

Birders and their travel companions are often interested in other activities in addition to birding, especially nature-based activities. As a result, marketing additional non-birding attractions/activities to birders may increase their length of stay in a destination. Therefore, there is a good opportunity for Sierra Leone to cross-sell birding activities with other tourist activities.

Birding shows and fairs

- **[Birdfair](#)**: Europe's largest annual bird watching fair, held annually in August, in Rutland.
- **[The African Bird Fair](#)**: Organized by BirdLife South Africa and run as a virtual event in 2020
- **[Pannonian Bird Experience](#)**: 3-day trade show for bird watching held in Austria.

Associations and Publication

- **[Surfbirds](#)**: Offers listings of international tour operators specialising in birding in international destinations.

- [Birdwatch](#): A monthly magazine for birdwatchers.
- [The Association of Independent Tour Operators \(AITO\)](#): Offers a listing of tour operators specialising in birding.
- [Bird Watching Magazine](#): Claiming to be Britain's best-selling bird magazine.
- [Birding Magazine](#): Distributed by the American Birding Association.
- [BirdWatching](#): North America's premier magazine about wild birds and birding.
- [Bird Watchers Digest](#): A bimonthly magazine sharing content on multiple platforms and hosting events such as the American Birding Expo.

Online forums

- [Bird Forum](#): touted as the Internet's largest birding community and forum
- [Chirp Birding](#): the social media platform for bird lovers.
- [eBird](#): A platform for bird lovers to record sightings, explore sightings from around the world and find more birds.
- [The Birding Life](#): A blog about bird watching in Africa. They also have two podcasts – the Birding Life Podcast and The Birding Life Youth podcast.
- Facebook groups:
 - [American Birding Association \(ABA\) Discussion group](#): a place to share ideas, start conversations, discuss news and issues of interest with 10K+ members (not appropriate for direct promotion or simply sharing photos).
 - [Facebook Birders](#): an international group for bird lovers.
 - [World Girl Birders](#): A group for women who love birds, from beginners to experts.
 - [The African Bird Club community group](#): A group managed by the African Bird club.
- Use the [American Birding Association's rarity code list](#) when posting photos of rare birds / bird sightings on social media.
- Use hashtags on Twitter and Instagram: #birdwatching, #birders, #birds, #birding, #bird_lovers, #bird_lovers_daily, #birdlovers, #birdphotography, #instabirds

Birding Associations and Clubs

- [African Birdclub](#): A British-based club for birders with a common interest in African bird species.
- [American Birding Association](#): Represents the North American birding community.
- [Association of German Avifaunists](#) (Dachverband Deutscher Avifaunisten or DDA): The union of all national and regional ornithological associations in Germany.
- [RSPB](#): The UK's largest nature conservation charity.

Tour Operators

- [Avian Adventures](#): One of the leading UK-based bird watching tour companies.
- [Bird Holidays Limited](#): UK based tour operator specialising in birdwatching holidays, birding tours, wildlife safaris and wildlife cruises.

- **Birdfinders:** Worldwide birdwatching holidays to the best birding destinations on every continent.
- **Birding Africa:** Recommended as one of the top 5 most recommended bird tour companies in the world.
- **Birding Breaks:** A Dutch tour operator offering a variety of birding packages expeditions for bird lovers in Ghana, Senegal and Gambia.
- **Birding Tours:** German tour operator offering a variety of birding packages.
- **BirdQuest Tours:** Easy-going bird and wildlife adventures.
- **Eagle Eye Tours:** US-based offering high-quality tours to worldwide destinations.
- **Greentours:** Provides Wildlife, Alpine Flower, Mammal Tours, Bird Watching and much more throughout the UK, Europe, Africa, Americas, Asia, Australia.
- **Ivory Tours:** German tour operator, specialising in sustainable African travel
- **Naturetrek:** The majority of their wildlife tours focus primarily on birds and offer a wide choice of bird holidays
- **Ornitholidays:** touted as the first birdwatching tour company in the world.
- **Rockjumper Birding Tours:** One of the world's longest established and most highly regarded birding tour companies.
- **Sunrise Birding:** US-based small group bird watching tours and wildlife safaris worldwide.
- **Wings:** US-based offering birding tours worldwide.

Hiking and trekking

Niche Market Description and Profile

Hiking is a very common global tourism activity. It appeals to travelers who enjoy walking and hiking outside in nature and who are also interested in authentic local experiences. It is a way to connect with the local landscape and enjoy the sense of a place, as a solitary pursuit or walking in a group, and meeting local people on the way. Additional cultural experiences such as staying overnight with a local family on a homestay are often included in longer hiking trips.

Trekking differs from hiking in that it tends to involve longer, more challenging journeys in more remote or difficult to access locations such as jungles or mountains. Trekking trips are usually conducted over few days, often involving six to seven hours daily trekking, and overnights are spent wild camping or in specially constructed basic huts.

Hikers and trekkers share many characteristics with ecotourists/nature tourists, adventure tourists and cultural tourists. This means they are interested in nature and wildlife, sustainable and responsible tourism, and have a strong desire for an authentic and immersive experience when they travel.

Hiking and Trekking Tourism in Sierra Leone

Northern Sierra Leone offers good hiking and trekking opportunities for Intrepid Explorers (see Adventure Tourism Segment Report).

Travel Behaviour

Around the world, hiking is one of the most popular outdoor activities and attracts participants of all ages. Trekking is a hard adventure activity and attracts outdoor adventure activity enthusiasts. Millennials (born between 1980 and 1995, aged between 26 and 41 in 2021) are a keen hiking group. Research in 2018 found that 81% of UK-based Millennials would consider taking up hiking as a hobby⁸². As a

⁸² [Millennial Hiking Trend Report UK](#), Sportsshoes.com

consumer group that are keen on authentic and unique travel experiences, Millennials are a good target group for walking and hiking experiences while on holiday.

For less well-known destinations with remote jungles and mountains, trekking is very appealing to hard outdoor activity adventurers and Intrepid Explorers. Trekkers are well-travelled and like to find places that not many people travel to, connecting with local people and trekking with experienced local guides. Sustainable tourism practices are important to them, along with pristine environments.

Product Requirements

The essential requirement for hiking and trekking travel products is anywhere that has a route, or potential to develop a route, with characteristics that are distinctive to the area. This can be any terrain that is suitable for hiking and trekking, including jungles, mountains, river trails, coastal regions and many more. Experiences can be guided or self-guided, on marked or unmarked trails/paths. Connecting with rural life is a key reason for hiking and as a result, community-based tourism and eco-tourism are often complementary products.

Safety of treks and safety of the destination is of utmost importance. Operators must be clear about the risks to participants and provide suitable guides, checklists and other materials in advance of a trip. Most hikers and trekkers are keen to know how easy or difficult a trip is likely to be so establishing a grading system to rate the difficulty of a hike or trek would be useful.

For guided hikes and treks, English-speaking guides can make or break the experience if they are knowledgeable and communicative and able to tell interesting facts and stories about the trek they are doing.

Hiking and Trekking Activities in Sierra Leone

Hiking:

- Hill walking in Kabala
- Tracking pygmy hippos on Tiwai Island
- Bird watching in Gola Rainforest National Park
- Hiking and wildlife watching in Outamba National Park
- Kenema Hills – the mountain circuit of Sierra Leone
- Guma Valley Nature Trail
- Hiking in the Wara Mountains

Trekking:

- Trekking in Loma Mountains National Park
- Climb Mount Bintumani
- Climbing and camping in the Tingi Hills

Marketing to Hikers and Trekkers

Trekkers primarily research and plan travel online through peer review sites, travel forums and social media. Images and videos of natural landscapes and remote locations have high appeal as trekkers plan their trips.

Trekking Shows

- [Adventure Travel Show](#): An adventure travel event for consumers held in London.
- [The Telegraph Outdoor Adventure & Travel Show](#): Another consumer adventure travel show held in London.
- [Travel & Adventure Show](#): Held in several cities across the United States.

- **The Outdoor Adventure & Travel Show:** Held in several cities across Canada from February to April.
- **Adventure Travel World Summit:** Organized by the Adventure Travel Trade Association for adventure tourism stakeholders including tour operators.
- **Tour Natur:** A walking and trekking trade fair held in September in Dusseldorf.
- **Pure Life Experiences:** A new show focusing on the ‘evolved’ traveler seeking experiences.

Associations and Publications

- **Active Traveler:** Guide to activity and adventure holidays in the UK and abroad.
- **Adventure Collection:** A partnership of the world's best adventure travel companies.
- **Adventure Travel Trade Association (ATTA):** A global trade organization for the adventure travel industry with a full list of specialist adventure travel tour operators.
- **Adventure World Magazine:** Covers a range of adventure sports including trail running, trekking and general adventure travel.
- **Backpacker Magazine:** Source for backpacking gear reviews, outdoor skills information and advice, and destinations.
- **German Alpine Club:** the world's largest climbing association and the eighth largest sports union in Germany. The Club is the responsible body for sport and competition climbing, hiking, mountaineering, hill walking, ice climbing, mountain expeditions as well as ski mountaineering.
- **Live for the Outdoors:** Britain's two best-selling monthly walking titles – Trail Magazine and Country Walking Magazine.
- **London Adventure Group:** London-based group that organizes adventure travel trips in the UK and overseas for its members.
- **Mountain IQ:** A club that unites active and adventurous travelers from all over the world.
- **Travel Africa Magazine:** Only international magazine dedicated to exploring Africa and travel to Africa.
- **Trek & Mountain:** UK based magazine featuring trekking destination guides and reports.
- **Wanderlust Magazine:** Wanderlust is a British travel magazine, covering adventurous, cultural and special-interest travel.
- **Other alpine hiking clubs:**
 - Austria: [Österreichischer Alpenverein \(ÖAV\)](#)
 - France: [Club Alpin Francais \(CAF\)](#)
 - Italy: [Club Alpino Italiano \(CAI\)](#)
 - Switzerland: [Schweizer Alpen-Club / Club Alpin Suisse \(SAC\)](#)
- **Others of interest:** <http://www.hikingandbackpacking.com/organizations.html>

Online Forums

- **All trails:** A platform for hikers to explore and find trails worldwide. The platform also includes a navigation tool. No trails are available on the platform in Sierra Leone yet.
- **Outdoor Active:** Features hikes and treks in destinations worldwide. Provides an inspiration platform as well through online travel guide and a discovery section.
- Use hashtags on social media: #hiking, #trekking, #hikingadventures, #hikingtheglobe, #hikingaddict, #hikingviews
- Facebook groups:
 - **#Hiking:** a public group to talk about hiking and backpacking (58.8k members).
 - **I love hiking:** a public group with 31.1k members to share photos and experiences about hiking.

Tour Operators

- **360 Expeditions:** Adventure travel, holidays, extreme expeditions and charity challenges.
- **Adventures Within Reach:** Adventure travel trips with activity, culture, and nature, which are customizable, flexible, and affordable.
- **Boundless Journeys:** Touted as one of the "Best Adventure Travel Companies on Earth" offering hiking and trekking.
- **Exodus:** The original activity and adventure holiday company.
- **Explore:** Small group adventure holidays including [walking and trekking tours](#)
- **Footprint Adventures:** Adventure holidays in Asia, Africa, and South America.
- **G Adventures:** small group adventure tour operator with a focus on responsible travel and partnership with the National Geographic Society.
- **Intrepid Group:** World's largest provider of adventure travel experiences.
- **KE Adventure Travel:** Boasts a strong collection of worldwide trekking holidays.
- **Macs Adventure:** Specialize in walking holidays, cycling holidays, and tailor-made adventures in the UK, Europe, and around the world.
- **Rei Adventures:** Active vacations, weekend getaways, family adventures, and volunteer expeditions for all levels of experience.
- **Travel the Unknown:** Promising worldwide active tours, including trekking.
- **Walks Worldwide:** Independent specialist for trekking and walking holidays.
- **World Expedition:** International tour operator specialising in small group trekking and adventure travel holidays and vacations since 1975.

Surfing

Niche Market Description and Profile

Surfing is considered to be an adventure sport and requires a high level of skill to master the sport. No special skills are required for body surfing which is enjoyed around the world where waves are suitable, and by all ages. Traditional surfing relies on waves and the tides and is therefore always performed at sea and ocean locations.

Surfing is a popular activity and there are estimated to be 35 million participants around the world⁸³, according to the International Surfing Association (ISA), of which 4.5 million are in Africa. The global surfing industry generates US\$22 billion in revenue from equipment⁸⁴.

Surfing is a male dominated sport but it is gaining popularity amongst women and young people. Women are now estimated to account for 20-30% of surfers⁸⁵. Surf camps that cater for the whole family may have growing potential.

Surfing Tourism in Sierra Leone

Sierra Leone has an exposed coastline that has reasonable waves of 1m-2m all year round, although at Bureh Beach, the main surf location, they are best during wet season. With the right marketing messages, there is potential to develop the destination to attract surfers keen to visit West Africa and link up with other surfing destinations in the region.

⁸³ [Surfer Today](#), 2021

⁸⁴ Ibid

⁸⁵ [Surfer.com](#), 2020

Neighbouring Liberia is well known as a surfing destination with world-class and uncrowded waves. Its centre of surfing activities, Robertsport in western Liberia, attracts international surfers particularly from Europe – often younger travelers with more relaxed buyer requirements.

Travel Behaviour

Surf travelers are often well-travelled and educated, in their early 30s, and medium to high income. The majority of surfers travel in groups of family and or/friends.

Product Requirements

The main requirements for a surfing destination are reliable and suitable waves on sandy beaches surrounded by beautiful, natural landscapes.

Leisure surfers comprise the largest segment of participants and are more likely to take part in additional activities while on a trip alongside surfing. Therefore, developing a range of watersports and other activities will appeal to leisure surfers, as will offering multiple surfing destinations to provide complementary experiences.

Leisure surfers prefer small-scale accommodation, comfort, quality food, and a diversity of activities. They create opportunities for surf schools and rentals.

Conversely, passionate surfers will travel with their own board, and prioritise waves over comfort. They are often looking for specific waves, uncrowded waters and unknown destinations. There is a drive to be the first amongst their peer group to experience a 'hidden' surf spot.

A much smaller, elite group are professional surfers who require great waves and good infrastructure. The presence of professional surfers and major competition events serve as effective indicators to attract other surf travelers.

Surfing Activities in Sierra Leone⁸⁶

- Bureh Beach – is the main surfing area, suitable for all ability levels; local surf club
- River Number 2 Beach – best for beginners
- Sulima Beach in far south east. Combine with trip to Robertsport, Liberia

Marketing to Surfers

Surf travelers primarily research and plan their trips online through peer review sites, travel forums, and social media. Surf specific sites are a popular source of first-hand accounts of wave conditions and more off-the-beaten-track surf spots as well as accommodation, and transport.

Surfing Trade Shows

- **Beach & Boat:** In the German city of Leipzig, targets the water sports market and it is the ideal presentation platform for vendors.
- **Boot Düsseldorf:** one of the most important water sports trade show in Europe; special theme areas for travel, sailing, beach, sportfishing and paddling.
- **Surf Expo:** the largest trade show of the surf industry, held in Orlando, Florida since 1976.
- **The Action Expo:** trade event in Northfield, USA which brings together manufacturers, retailers, marketers and young action sports fans.

⁸⁶ <https://nomadsurfers.com/surfing-in-sierra-leone/>

Online forums and Publications

- [Global Surfers](#): online surf and travel community.
- [GoSurfAfrica.com](#): free surf guides for Africa, aims to promote sustainable development through surf in Africa.
- [Low Pressure](#): creator of surf and travel guides, app, newsletter and trip planner.
- [Lush Palm](#): Surf travel and lifestyle website featuring in-depth destination guides.
- [Magic Seaweed](#): Surf reports, surf forecasts, webcams and surfing photos for spots around the globe.
- [Surfer](#): Magazines for surf enthusiasts.
- [SurfGirl](#): UK publication and website/blog focused on female surfers, with travel guide section.
- [Surfing Waves](#): online resources, including trip guides and forum for surf enthusiasts.
- [Surflife](#): California based website specialising in surf reports and editorial coverage with a network of 4 million+ users.
- [Wanna Surf](#): online surf spot atlas and forum.
- [WindSurfingMag](#): water sports tips and product reviews platform; former organizer of National Watersports Festival (NWF) in the UK.

Surfing Associations and Clubs

- [Bureh Beach Surf Club](#): Small surf club 1h30 drive away from Freetown. Perfect for beginners and intermediate surfers.
- [International Surfing Association](#): the governing association for all surfing sports.
- [Kwepunha Retreat](#): Sustainable surf camp in Robertsport with a community development focus.
- [Liberian Surfing Federation](#): Liberian national sport organization, teaching youth and adults to surf and creating a surfing community in Liberia. Connect Naquetta Ricks or liberiansurffederation@gmail.com

Tour Operators

- [Destination Surf](#): French tour operator specialising in board sports travel, especially kitesurf and windsurf tours.
- [Errant Surf](#): UK-based tour operator offering surf adventure itineraries in Morocco, Ghana, South Africa and Mozambique.
- [Nomad Surfers](#): surf camps and holidays for teenagers and adults, trips in West Africa.
- [Surf Holidays](#): Ireland and UK based platform selling surf packages, accommodation and lessons; currently sell Morocco, South Africa and Mozambique in Africa.
- [Surfcamp – Online](#): Surf camp directory with surf camps around the world including Africa.
- [The Perfect Wave](#): world's largest surf travel network offering bespoke tours, guides and responsible travel.

Sport fishing

Niche Market Description and Profile
<p>Sport fishing encompasses a wide range of angling experiences that are either for recreational or competitive purposes and can be done in saltwater or freshwater locations. The attraction of sport fishing is the excitement of the ‘fight’ between fish and man.</p> <p>Recreational fishing is big business and economic contributions have grown steadily over the past decades. As a participatory sport, fishing has considerable appeal and has some recognition as the top ‘gateway’ activity, spurring involvement in other outdoor interests – more than 75% of angling enthusiasts also participate in multiple outdoor interests such as walking, hiking and camping.</p> <p>Worldwide, anglers are predominantly male (70%) and have an average age of 35-44 years. They tend to have a higher-than-average disposable income and are more likely to be educated to degree level and beyond.</p> <p>To go fishing as a child is a very common experience in the US, with 83% of Americans indicating that they had fished as a child. Men make up most regular anglers in the US (73%) with age demographics fairly evenly spread between the ages of 25 and 64 (77%). Fishing participation in the US remains high at 17% of the US population, or 50.1 million people⁸⁷.</p> <p>Most anglers in the UK are male (80%) and over 40% are aged 55+. Of these, most are ‘frequent’ anglers with 62% fishing 10 or more times every year.</p> <p>Across Europe, the European Anglers Alliance (EAA) estimates that expenditure on recreational fishing in the region exceeds €25 billion annually, and that there are more than 25 million anglers, of whom 15 million fish in fresh waters.</p> <p><i>Sport Fishing in Sierra Leone</i></p> <p>Most fishing in Sierra Leone is artisanal. Sport fishing is a year-round activity and Sierra Leone is a recognized destination for the sport</p> <p>Tarpon season on the Sherbro and Kittam river estuaries is from January to May – together they have 12 listed IGFA world record catches of tarpon. Tarpon is reputed to be the most powerful and hardest fighting fish.</p> <p>Other game fish include: barracuda, bunga, red and yellow jack, grouper and giant mackerel.</p>
Travel Behaviour
<p>Sports anglers, or those who are prepared to travel further to catch iconic species, are more likely to spend more than traditional recreational anglers and visit remote places to bag the fish.</p>
Product Requirements
<p>Suitable, and plentiful, fish species of the type usually found in Sierra Leone is the major requirement for sport fishing.</p> <p>To attract sport fishing tourists, there must also be:</p> <ul style="list-style-type: none"> • Fleets of charter boats of sufficient seaworthiness and range to transport crew and anglers to fishing grounds and back

⁸⁷ [2020 Special Report on Fishing](#) – Recreational Boating & Fishing Foundation, Outdoor Foundation

- Experienced anglers to guide visitors
- Range of equipment and bait to hire and/or purchase
- Adequate flow of fuel supplies

Sport Fishing Activities in Sierra Leone

- Freetown Peninsula – The Aqua Sports Club (members only club but visitors can usually be allowed on boats as guests)
- River Number Two
- Banana Islands
- Bothe Holiday Village – big game fishing
- From Bonthe, access to estuaries of Sherbro and Kittam rivers

Marketing to Sport Fishing Tourists

Sport fishing Trade Shows

- [European Fishing Tackle Trade Exhibition \(EFTTEX\)](#): the premier trade show for the industry. 2021 edition postponed.
- [ICAST](#): The world's largest sport fishing show. Based in the United States.
- [The Big One Show](#): Fishing trade shows in the United Kingdom.

Publications

- [American Angler](#): Covers fly-fishing, tackle, news and destinations.
- [Angling Times](#): Reviews and advice for sport fishing enthusiasts.
- [Field and Stream](#): Considered one of the best fishing magazines available.
- [Fly Fisherman Magazine](#): Offer tips for beginners and experts, different species and gear and destinations.
- [In Fisherman](#): The website includes a destination section and an in-fisherman TV.
- [Marlin Magazine](#): Big Game fishing content. Includes a travel section.
- [Saltwater Sportsman](#): concentrates on saltwater fishing. Has a very small travel section.
- [Sport Fishing](#): Includes a travel section and sport fishing TV featuring key sport fishing destinations.
- [World Fishing Network](#): Leading entertainment multi-platform brand for anglers in North America.

Online forums

- [Angler Social](#): A social networking site dedicated to sport and recreational anglers with a goal of creating a web community for those who love to fish. Current statistics state 4,070 members with 601 fish shared in 1216 albums.
- [Fish Track](#): Fishing charts, reports, cams and a mobile app worldwide to find fish.
- [Fishbrain](#): Created as a social network for anglers by Swedish entrepreneurs in 2013, the Fishbrain database has amassed names and images of more than 43,000 types of bait and logged 75,000 catches with 95% of data uploaded via the mobile app rather than the website. Users are predominantly from North America, Sweden and Australia.

- [**Fishing TV:**](#) entertainment platform for anglers. Four free-to-view channels plus added extras for members. Includes the Game Fisher's Diary which features worldwide fishing destinations.
- [**World Sea Fishing:**](#) online forum community dedicated to fishing and boat owners (87.8k members).

Associations and Clubs

- [**American Sport Fishing Association \(ASA\):**](#) A nonprofit trade association working to safeguard and promote recreational fishing.
- [**European Fishing Tackle Trade Association \(EFTTA\):**](#) supports the fishing tackle trade industry to promote sport fishing.
- [**International Federation of Fly Fishers:**](#) Publishes its own magazine, Flyfisher.
- [**Take Me Fishing:**](#) Site of the Recreational Boating and Fishing Foundation (RBFF) whose mission is to increase participation in recreational angling and boating and thereby increase public awareness and appreciation of the need to protect, conserve and restore aquatic natural resources.
- [**The Angling Trust:**](#) A single organization representing all game, coarse and sea anglers and angling in England

Tour Operators

- [**Fish Travel Guide:**](#) An online resource to help find 'dream' fishing holidays incorporating destinations, charters, hotels and attractions.
- [**Fishing Booker:**](#) Find and book fishing charters worldwide online.
- [**Sport Quest:**](#) Offers full tour packages for fly fishing, big game fishing and sea fishing holidays.

Appendix 2: Sierra Leone destination brand strategy (full version)

Introduction and context

The Government of Sierra Leone (GoSL) has officially prioritized tourism under Cluster 3 of its New Direction Manifesto. The World Bank is preparing an Economic Diversification Project, one of the components of which will take an integrated destination approach to improving the performance of Sierra Leone's tourism sector. This will be achieved through a mix of institutional and policy reforms, market development and national re-branding as well as building B2B linkages and strategically developing tourism products in selected areas.

The GoSL and stakeholders have made their commitment clear for a national marketing strategy that focusses on ecotourism and sustainable tourism, and the pursuit of related niche markets for the project duration.

An objective of this initiative is the development of a national tourism marketing and rebranding strategy that is feasible to implement, resonates with tourism stakeholders and target markets, and embraces the importance of sustainability.

This document contains the final brand strategy for Sierra Leone's destination brand. The brand strategy must be read in conjunction with the marketing strategy. The brand strategy and marketing strategy have been finalised in separate documents to better manage the bulk of information contained in each document.

It is deemed prudent to record all the information from which the brand strategy was distilled to better inform both the understanding of the brand strategy and to inform future evolution of the brand strategy, given that a brand must be dynamic.

In the interests of brevity an executive summary is included, and a PowerPoint presentation of this executive summary is available from the Marketing Manager of the National Tourism Board (NTB).

In addition, a summary of the brand strategy is contained in a Brand Manual, also available from the Marketing Manager of the NTB in both digital and printed format.

The validation process included the outgoing tour operator interviews attached as Appendix 3 as well as a series of meetings with a task team chaired by the General Manager of the NTB, Madam Fatmata Mida Majid Carew:

Ministry of Tourism & Culture:

- Dr Memunatu Pratt, Honourable Minister
- Mr Andrew Sorie, Permanent Secretary
- Mr Mohamed Jalloh, Director of Tourism
- Mr Ishmeal Kamara, Assistant Director of Culture

National Tourism Board:

- Mr Tamba Allieu-Kokobaye, Chairman of the Board
- Madam Fatmata Mida Majid Carew, General Manager
- Madam Lucinda Kargbo, Marketing Manager

Monuments and Relics Commission:

- Mr Francis Momoh, Senior Research Officer

Private Sector:

- Mr John Shallop, President of the Hotel and Tourism Association.
- Mr Bala Amarasekaran, Tacugama Chimpanzee Sanctuary.
- Mr Aram Kazandjian, Tacugama Chimpanzee Sanctuary.
- Mr Bimbola Carrol, VSL Travel.

The brand strategy was finally ratified at a validation workshop held in Freetown on 14 October 2021.

Executive summary

HOW IS SIERRA LEONE POSITIONED?

In brand strategy terminology positioning is described as **brand vision**: where you want to see your brand in people's imagination in the future, and the elements of this vision are your brand's essence and promise, summarised in its slogan.

Sierra Leone's **brand essence** is **FREEDOM**:

Sierra Leone is so deeply steeped in freedom that it has come to be defined by it, reflected in a way of life that both understands and embraces peace and unity. Truly valuing freedom belongs to those who have been bereft of it and then have earned it back again by overcoming conflict and from a history that includes these waves of freed slaves that have come hopefully to these shores. And so, as the anthem proclaims, Sierra Leone is the realm of the free and it invites you to explore freedom.

The last line of this rationale is the **brand promise**:

Sierra Leone is the realm of the free and it invites you to explore freedom.

And the slogan is the last two words of the brand promise: **EXPLORE FREEDOM**.

HOW DOES THE BRAND PROMISE INSPIRE THE BRAND IDENTITY?

The most persistently present brand asset you have is the brand identity (or logo) which is the sign-off for all brand communication and it is helpful to understand why it looks like it does:

It incorporates icons and colours that represent attractions:

- Beach
- Sea
- Forest
- Culture



It is inspired by the Sierra Leone National Flag which positions it as a national asset.



A typeface which is unique to Sierra Leone

And our slogan which is the essence of our positioning

CONSISTENT BRAND EXPRESSION WILL HELP INCREASE RECOGNITION AND THEREFORE AWARENESS AND RECALL.

Personification

In building a personality for Sierra Leone's wonderful destination brand you need to imagine the typically helpful Leonian as well as the kind of tourist attracted to exploring freedom:



An exuberant sense of joy and happiness that finds expression in free and easy warmth, friendliness, helpfulness, genuine hospitality and authentic kindness.



Adventurous explorers who want to learn from new experiences by interacting with nature and people, who want to share what they have learnt and who want help when they need it.

As one tourist put it:

*"Well, look at this – and the people, there is **always someone to help you.**"*

Words, tone and manner

TONE

Tone should be upbeat (but not hectic) **and friendly**. It should also be personal, using ‘I’ and ‘you’ and ‘us’ and ‘we’ (never ‘them’ and ‘those’) so that there is a sense of inclusivity and sharing.

MANNER

Manner should always be a combination of informative and helpful, with respect being demonstrated by seeing it from the tourist’s point of view – they want new experiences and they want information from which to learn. They also want help so that they can concentrate on their experience.

WORDS

The words used must be **rich in information and knowledge** because the kind of tourists we are talking to are hungry to learn and they want to share what they have learnt. The information must be both factual and entertaining, drawing as much on stories, myth and legend as it does on history and science.

Creative platform

The **creative platform** should be **Leonians sharing their history, stories, myths and legends, their arts, their music, their crafts and the love they feel for their land**, recalling the Honourable Minister of Tourism and Culture’s words: *“That woman working the land, that young boy selling fruit on the beach, that man on his akada in Kabala, the musician, the dancer, the town crier, the weaver, it’s a whole song and it needs to be communicated.”*



Visual language

- In terms of **colour** the green, white and blue of the Sierra Leone national flag must dominate, but Sierra Leone is a colourful place so there must be accent colours.
- In terms of **graphics** we take our lead from the brand identity (the free flowing feel of the flag and the graphic treatment of the icons and the natural authenticity of the typeface.)
- **Photographic** treatment must show the natural beauty and the beautiful people and there needs to be a careful balance between places and people.
- Wherever possible the picture should include both place and people but this must not be forced.



Instead of this



this.



- **Graphic and photographic** combine in a treatment called waves of freedom, a wash that elegantly blends the two.



Brand Sierra Leone

Brand and brand strategy defined

A good definition of a **brand** is:

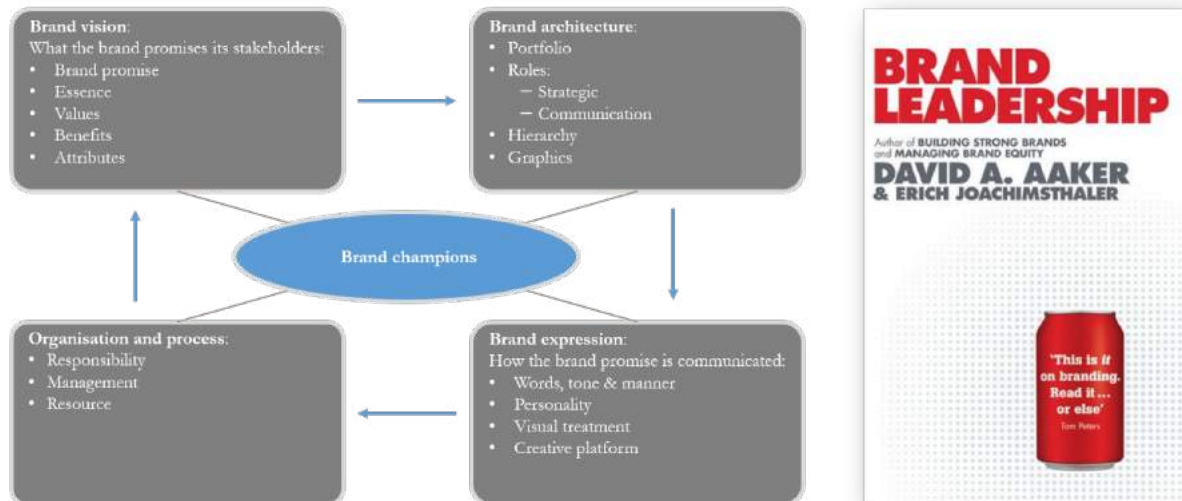
*A brand is a **badge** of origin, a **promise** of performance and a means of **differentiation** used in pursuit of a defined **purpose**.*

A **brand strategy** describes a brand in terms of the above definition.

The purpose of any **destination brand** is to promote tourism to the destination by capturing the imagination of targeted tourists and the tourism value chain.

Methodology

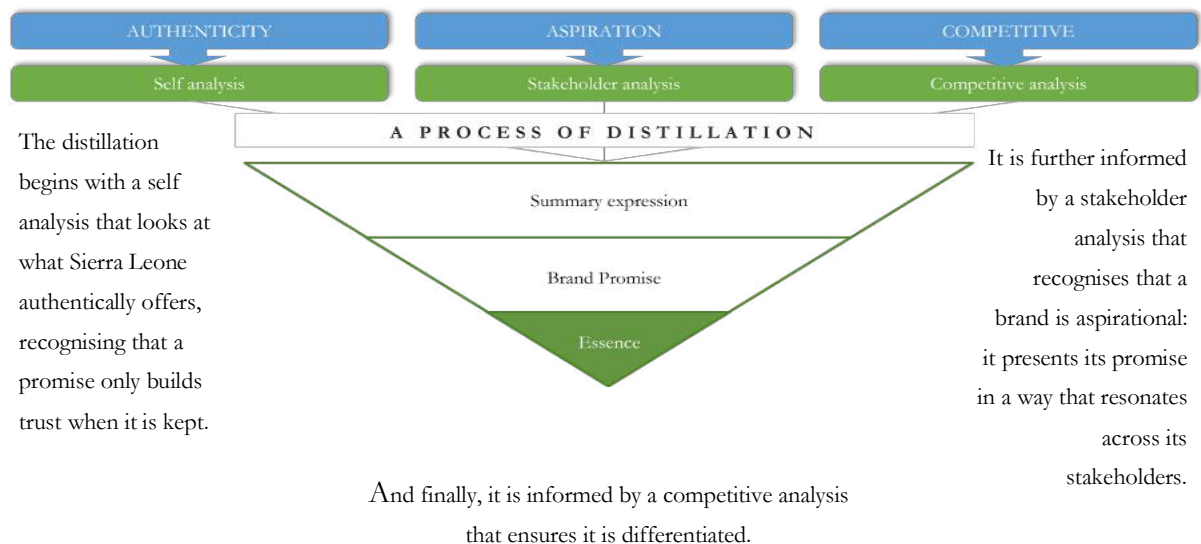
The brand strategy methodology that was applied is based on that developed by David A. Aaker and Erich Joachimsthaler in *Brand Leadership*, adapted to destination branding:



- The **brand champions** can be divided into:
 - *Brand informers*: everyone who gave input to describing the brand including everyone who took part in regional workshops; those interviewed during the field trip; travel influencers and tour operators; and those taking part in the validation workshop.
 - *Brand approvers*: the task team as described in the introduction.
 - *Brand champions* as described under brand organisation in this document: brand owner, brand manager, and brand champions.
- **Brand vision** uses a process of distillation to discover an authentic *differentiated brand promise and essence*.
- **Brand architecture** develops a brand identity, the *badge of origin*, consisting of the destination name and iconography (logo) representative of its promise.
- **Brand expression** begins with the brand essence, which is the slogan, and extends to guidelines for communication: personification; words, tone and manner; visualisation; and a creative platform.
- And **brand organisation** ensures that tools, responsibilities and practices are in place to protect and build the brand.

Brand vision

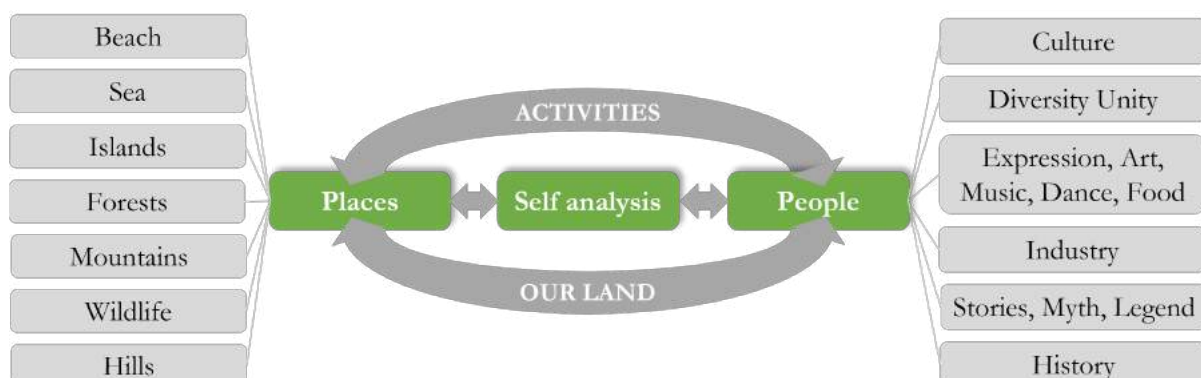
Brand vision is how to position the Sierra Leone destination brand, and this is done by **making a promise** that is arrived at through a process of distillation:



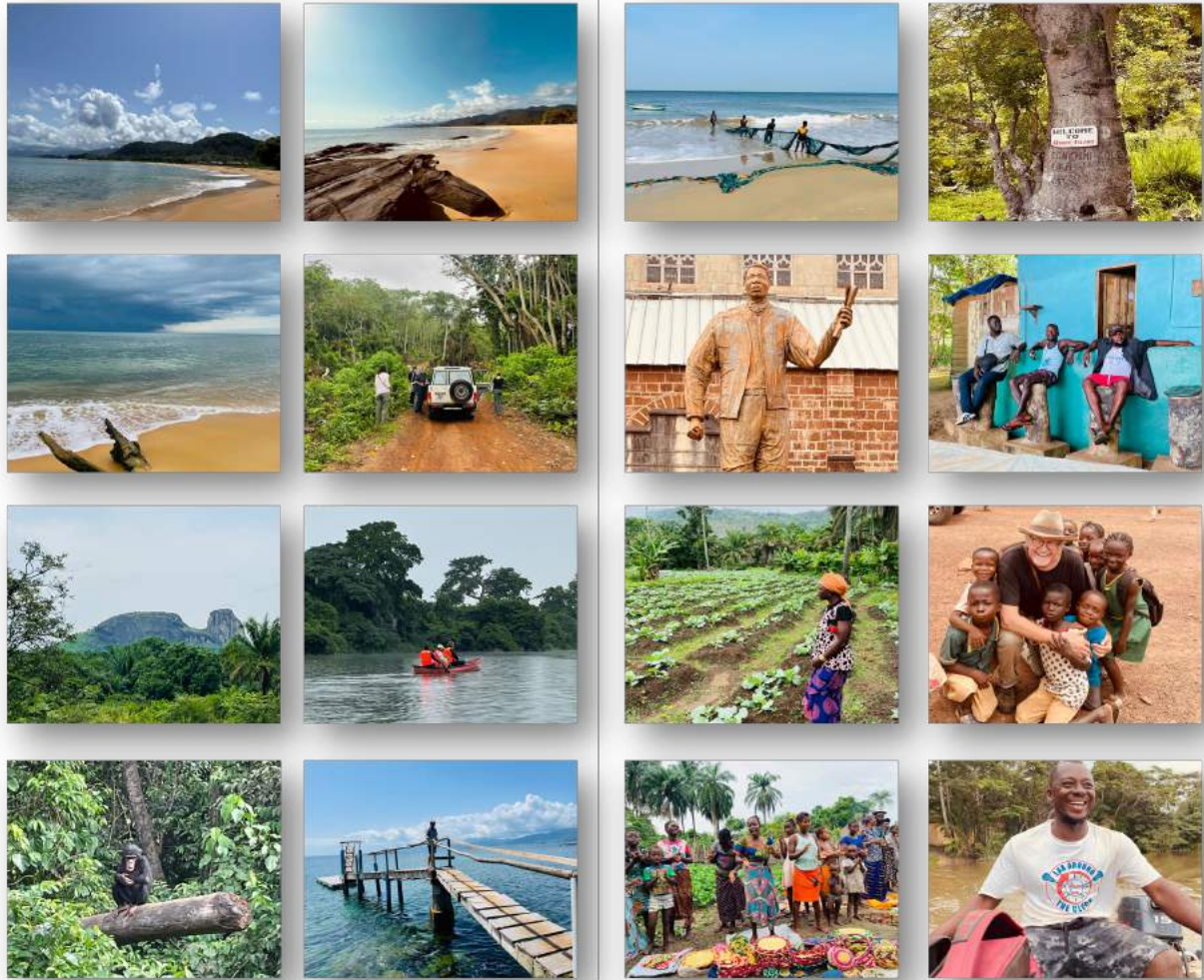
It is very important that the way Sierra Leone is positioned takes the following principles of good branding into account:

- The brand must have a sharp, single-minded focus. If it tries to be all things to all people, it runs the risk of being nothing to anybody.
- Whatever this focus is, it must be an idea that is big enough to span both the full offering as well as able to span time – it must be able to stretch and have longevity.
- It must be authentic – nothing kills a brand faster than not keeping its promise.
- And it must be different from what competitive destinations are offering.

Sierra Leone can authentically claim to have a great deal to offer the world of tourism:



On one hand it has its natural beauty, on the other it has its beautiful people:



The land and the people are linked by the activities people can pursue on the land and by pride in the land, with this linkage quite wonderfully contained in this quotation:

“Take care of nature and it will take care of you.”

BALA AMARASEKARAN, TACUGAMA'S CHIMPANZEE SANCTUARY BABU PHILOSOPHY

With so much to attract people to Sierra Leone there is a need to focus on what it is that will attract them most: what do they aspire to.

Travel influencers mention the following:

Beaches: 38 mentions.

Wildlife (15) / Forests & Reserves (12) / Chimps (8): 35 mentions.

Freetown (14) / People & Culture (11) / Food & Music (8): 33 mentions.

History (8) / Slave Trade (13): 21 mentions.

So, they recognise everything listed under self analysis, with a slight bias to natural attractions over the people oriented attractions, but it should be born in mind that *only one of the influencers had actually visited Sierra Leone* and he posted a strong endorsement on his website that had more to do with people than with nature:

*“English language, more advanced and safer than neighbouring countries, easy to find
and good food. There should be more tourism here than The Gambia.”*

JAMES SMITH

It is what **people who have experienced Sierra Leone** say that gives us rich brand input, and they have wonderful things to say about both natural and cultural attractions:

NATURE	PEOPLE
<p><i>Nestled on the West Coast of Africa, Sierra Leone is a holiday gem offering unspoilt palm-fringed beaches, lush tropical rainforests, breathtaking mountains and warm friendly locals.</i></p> <p>VISITORS GUIDE 2021</p>	<p><i>“Calm.”</i></p> <p>BOLA ADESOLA</p>
<p><i>“The discovery of a sheltered harbor with a plentiful supply of drinking water on an otherwise hostile, low-lying, disease-ridden coast of West Africa meant that by the sixteenth century Sierra Leone was already receiving plenty of visitors by ship.”</i></p> <p>TIM BUTCHER</p>	<p><i>“The vibrant nightlife of Freetown – great restaurants with superb seafood and clubs.”</i></p> <p>AMINATA KASIM-CAREW</p>
<p><i>“When Freetown came into sight I was charmed. It was the prettiest city I had seen, snuggled away in dense foliage and ranges of hills that came to an abrupt end in long, lovely beaches running into a turquoise sea.”</i></p> <p>RIAAN MANSER</p>	<p><i>“Local music is a great metaphor for Sierra Leone’s resurgence. This celebration of life is perhaps best captured in Freetown’s music heroes, Ansumana Bangura, S. E. Rogie and Abdul Tee-Jay... The Sierra Leone Refugee All Stars have put the nation’s rich musical heritage and innovation back on the map... Today the soundtrack to the dance floors of Freetown is hip-hop and dancehall, using keyboards and digital mixers.”</i></p> <p>SAM BLEAKLEY</p>
<p><i>“First off it’s about the beautiful beaches, white sand and a backdrop of green mountains – a virgin land.”</i></p> <p>AMINATA KASIM-CAREW</p>	<p><i>“I left Freetown with slight reluctance – the kindness and intensity of emotion I had experienced there surpassed anything I had felt up to this stage.”</i></p> <p>RIAAN MANSER</p>
<p><i>“The fishing is amazing, like off Sherbro and Bonthe Islands and off the Turtle Islands, remote, undiscovered.”</i></p> <p>JOSEPH ‘BAREFOOT’ RICHARDS</p>	<p><i>“Then there are the warm and friendly people – forests of friendliness – an openminded and progressive mindset.”</i></p> <p>AMINATA KASIM-CAREW</p>
<p><i>“In recent years Sierra Leone has sought to reclaim its status as a tourist destination, placing great emphasis on</i></p>	<p><i>“They look after you. It’s not only safe, they make you feel safe.”</i></p>

NATURE	PEOPLE
<p><i>a coastline so beautiful it once drew thousands of European visitors each year.”</i></p> <p>TIM BUTCHER</p>	<p>GERMAN TOURIST AT OUTAMBA KILIMI</p>
<p><i>“Small, forgotten paradise, with its white sand and crystal-clear waters, one of the most beautiful coasts in West Africa... you can’t see many beaches like this in the world... rarely do you go anywhere that you have a paradise.”</i></p> <p>OLIVIA BIZOT (FRANCE24)</p>	<p><i>“Freetown likes to party. Once they know you they invite you in and you can party every night. They love to share.”</i></p> <p>FRENCH TOURIST AT OUTAMBA KILIMI</p>
<p><i>“The local sand battered surf break peeled majestically for fifty meters. The backdrop was just as mouthwatering: a dense mangrove, red-flowered, locust beans, then hills of ironwood and the occasional towering cotton tree.”</i></p> <p>SAM BLEAKLEY</p>	<p><i>“Well, look at this – and the people, there is always someone to help you.”</i></p> <p>ENGLISH TOURIST AT 2ND BEACH</p>
	<p><i>“The pure joy and happiness you find here.”</i></p> <p>NATALIA ROSA, COMMUNICATION SPECIALIST, THE JOURNEY / ACORN</p>

Tour operators that were interviewed had more insight into Sierra Leone than influencers because they were selected specifically because they had experience in West Africa.

- For tour operators who don’t have experience with Sierra Leone but do have West African experience, there is an expectation / anticipation that it will all be about beaches, then wildlife and then culture.
- Once Sierra Leone has been experienced the prioritisation changes, with emphasis shifting to culture.
- This is attractive to tour operators with experience in West Africa but who are currently not selling Sierra Leone – they feel that the people-oriented attractions will be better received.
- While operators already selling Sierra Leone narrow the people focus to emphasise the historical aspect of culture.



So, the stronger appeal is found in the people of Sierra Leone, as endorsed by the Honourable Minister of Tourism and Culture, Dr Memunatu Pratt:

“That woman working the land, that young boy selling fruit on the beach, that man on his akada in Kabala, the musician, the dancer, the town crier, the weaver, it’s a whole song and it needs to be communicated.

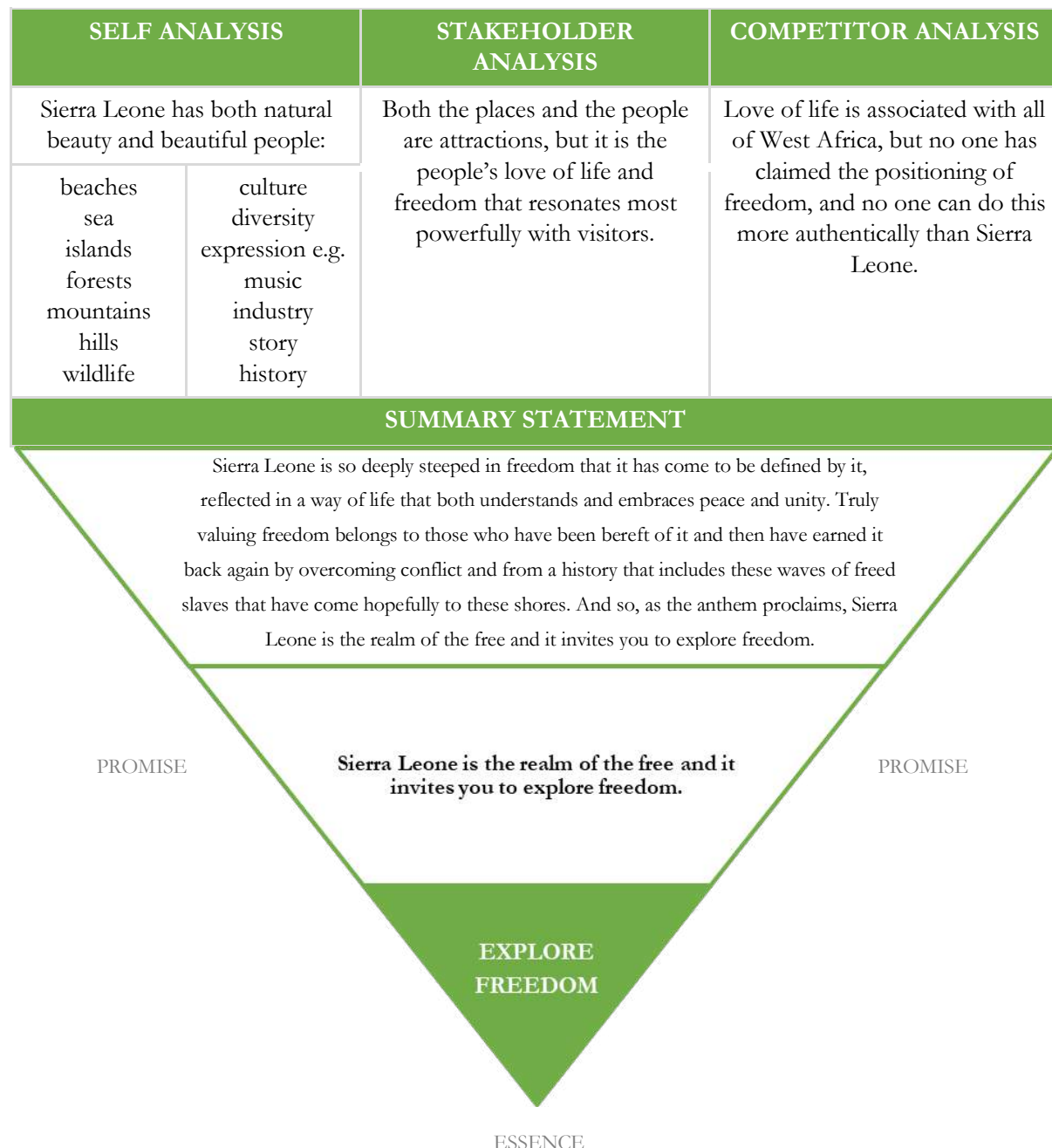
“At the end of the day it is about people.”

This makes two positioning concepts attractive:

ESSENCE	
Freedom	Love of life
RATIONALE	
<p>Sierra Leone is so deeply steeped in freedom that it has come to be defined by it, reflected in a way of life that both understands and embraces peace and unity.</p> <p>Truly valuing freedom belongs to those who have been bereft of it and then have earned it back again by overcoming conflict and from a history that includes these waves of freed slaves that have come hopefully to these shores.</p> <p>And so, as the anthem proclaims, Sierra Leone is the realm of the free and it invites you to explore freedom.</p>	<p>There is such an exuberant sense of pure joy and happiness that surrounds you in Sierra Leone, in the free and easy warmth, friendliness and helpfulness of its people.</p> <p>The colourful cultural diversity is united in its resilient determination to be genuinely hospitable, kind and protective.</p> <p>Here you will find it easy to leave your troubles behind you and rediscover yourself.</p>
<p>The <i>freedom</i> positioning concept is powerfully authentic to Sierra Leone because of its history, e.g.:</p> <p style="text-align: center;"> Bunce Island The Freedom Tree The Maroon Church Thomas Peters Bai Bureh Madam Yoko A capital City called Freetown. </p> <p>It is a positioning concept that also begins to change the negative narrative of the civil war by drawing attention to the positive narrative of Sierra Leone’s history.</p> <p>Sierra Leone’s history of freedom is fact, the most powerful differentiator possible.</p>	<p>Where the <i>freedom</i> positioning is substantiated by facts of history, this <i>love of life</i> positioning concept is emotionally subjective – it is a feeling rather than a fact.</p> <p>It is also not a differentiator. Both Ghana and The Gambia use a version of it in their positioning:</p> <div style="display: flex; justify-content: space-around; align-items: center;">   </div> <p>If the tour operator research is taken into account what is shown is that culture is the generic positioning for West Africa, so Sierra Leone in effect already have this as a property by virtue of geography.</p>

So, Sierra Leone's history provides the differentiator of *freedom* and Sierra Leone's geography, as part of West Africa, incorporates the *love of life* concept, providing easy association with those attractions that relate to the people of Sierra Leone, the source of their pride.

This process of distilling a brand promise can be summarised as follows:

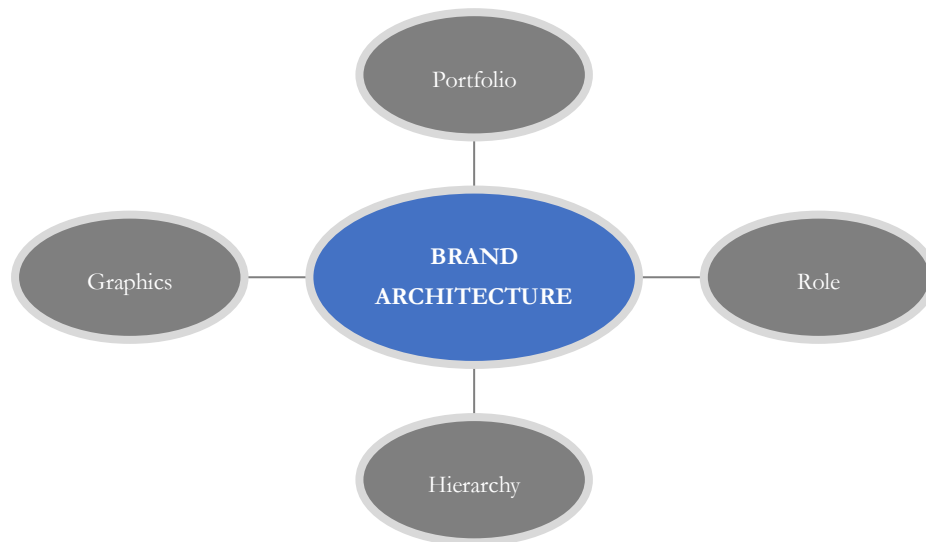


The brand essence becomes the **slogan**:

Explore Freedom

Brand architecture

Brand architecture needs to cover the following:



- The *portfolio* identifies what brands are required to deliver on the objective.
- The *roles* describe what each brand in the portfolio does strategically and in communication.
- *Hierarchy* dictates how the brands in the portfolio relate to each other.
- And *graphics* is the design of the brand identity.

In terms of *portfolio* the project identified the need for only one brand: Sierra Leone's destination brand.

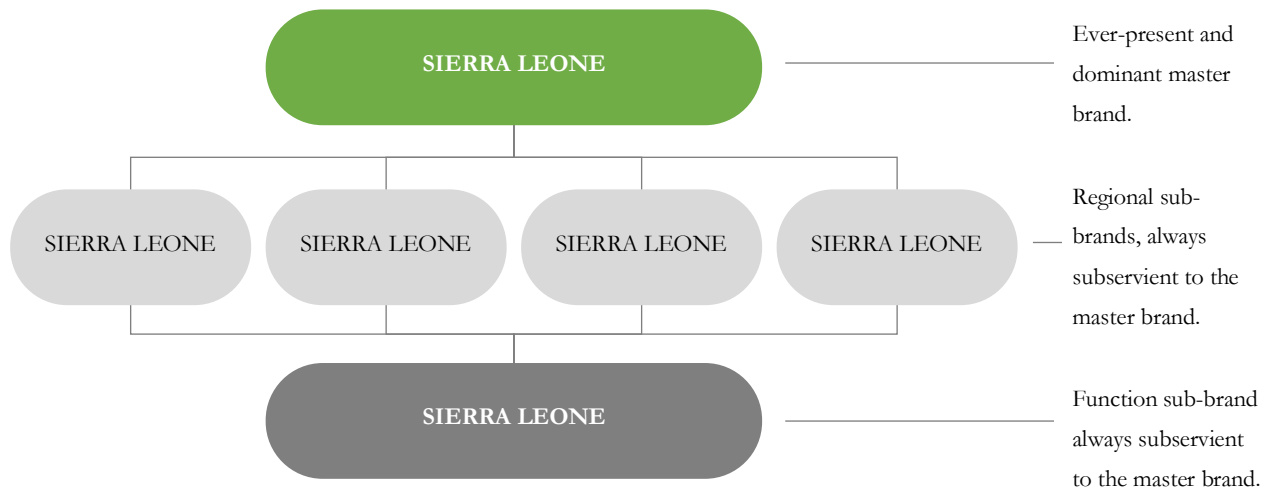
But in formulating this brand architecture the following has to be taken into account into the future:

- The four regions may want to develop an evolution of the national brand identity: Western (Freetown), Northern (Makeni), Eastern (Kenema) and Southern (Bo).
- A brand identity for the NTB.

The *roles* that each brand plays are described as:

PORTFOLIO	STRATEGIC ROLE	COMMUNICATION ROLE
SIERRA LEONE NATIONAL	A national destination brand that resonates with tourism stakeholders in the target markets.	Positions Sierra Leone as the realm of the free that invites you to explore freedom.
SIERRA LEONE REGIONS	Regional destination sub-brands that resonate with tourism stakeholders and target markets.	Positions the regions of Sierra Leone as realms of the free that invites you to explore freedom.
SIERRA LEONE NTB	A national destination sub-brand that designates the NTB as responsible for promoting Sierra Leone as a destination.	Positions the NTB as responsible for promoting tourism to Sierra Leone.

In terms of *hierarchy* the portfolio relates as follows:



In terms of *graphics* the following is Sierra Leone's brand identity, explained in terms of its iconography (why it has been designed the way it has):



The following is the NTB brand identity which incorporates the national tourism brand identity but ensures that the NTB is given the gravitas and status it deserves:

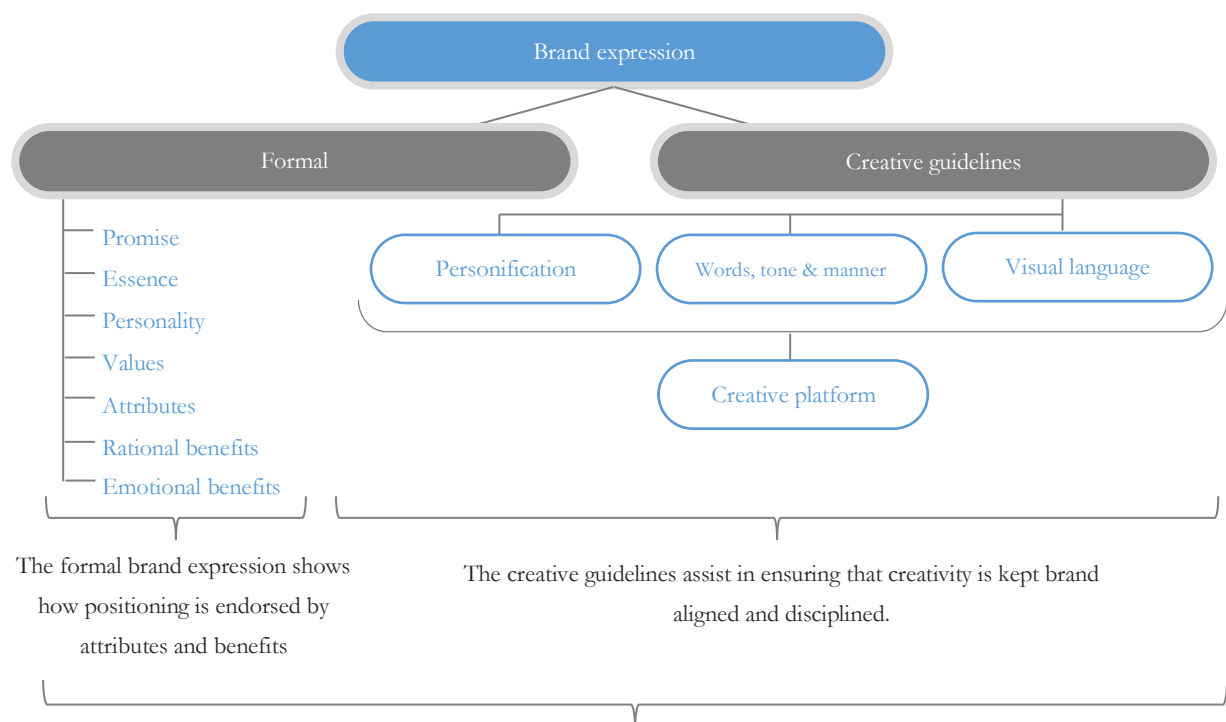


For versatility in applying a horizontal and stacked version have been prepared.

Brand expression

Whereas brand vision (positioning) and brand architecture (brand identity / logo) are rules that must be applied to ensure consistency, thereby increasing recognition and awareness and building trust, brand expression is a set of guidelines that help give communications brand focus. By doing this consistently, recognition and awareness are further enhanced, contributing to deepening trust.

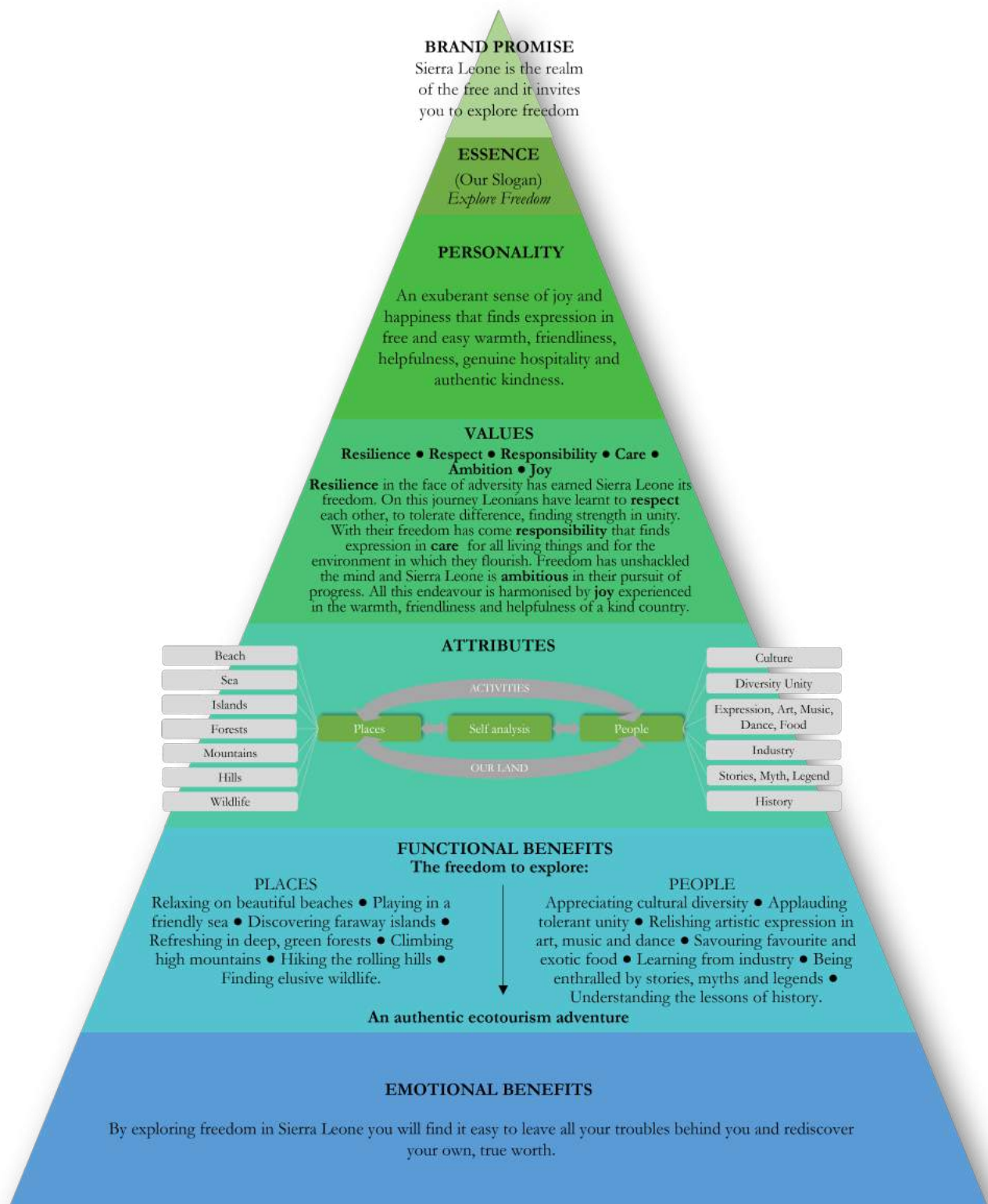
Brand expression covers the following:



The purpose of brand expression is consistency, and consistency is important because it increases both recognition and

The **formal brand expression** is informed by the brand vision as well as by questions that were asked at the field trip's Freetown regional workshop.

Both the selected positioning of *freedom* and the considered alternative of *love of life* have been used in reaching this formal brand expression, with *love of life* informing personality and values and both informing benefits and attributes:



Which brings us to **creative guidelines**.

In the formal brand expression the personality of the Sierra Leone destination brand has already been described, in **personification** we need to extrapolate from our brand personality, extending that to include the character of our core target audience, who have been identified as intrepid explorers, adventure sport and eco enthusiasts, SAVE (Scientific, Academic, Volunteer and Education) tourists, and nature explorers, finding what they have in common:



An exuberant sense of joy and happiness that finds expression in free and easy warmth, friendliness, helpfulness, genuine hospitality and authentic kindness.



Adventurous explorers who want to learn from new experiences by interacting with nature and people, who want to share what they have learnt and who want help when they need it.

As one tourist put it:

*"Well, look at this – and the people, there is **always** someone to help you."*

As regards **words, tone and manner** we must draw on the above personification, our values and on the two concepts that informed the brand vision:

tone

Tone should be upbeat (but not hectic) and friendly. It should also be personal, using 'I' and 'you' and 'us' and 'we' (never 'them' and 'those') so that there is a sense of inclusivity and sharing.

manner

Manner should always be a combination of informative and helpful, with respect being demonstrated by seeing it from the tourist's point of view – they want new experiences and they want information from which to learn. They also want help so that they can concentrate on their experience.

words

The words used must be rich in information and knowledge because the kind of tourists we are talking to are hungry to learn and they want to share what they have learnt. The information must be both factual and entertaining, drawing as much on stories, myth and legend as it does on history and science.

Visual language is further applied in the brand manual but is based on the following:

- In terms of **colour** the green, white and blue of the Sierra Leone national flag must dominate, but Sierra Leone is a colourful place so there must be additional accent colours.
- In terms of **graphics** we take our lead from the brand identity (the free flowing feel of the flag and the natural authenticity of the typeface).
- **Photographic** treatment must show the combination of natural beauty and beautiful people and there needs to be a careful balance between places and people. Wherever possible pictures should include both place and people but this must not be forced.



Instead of this  this.



- Graphic and photographic visual language are combined in a graphic treatment called waves of freedom; highlighted in the two poster applications shown below:



The *waves of freedom* graphic device.

This does not have to be used on every photograph but should always be used where the brand identity or a title is superimposed over a picture.



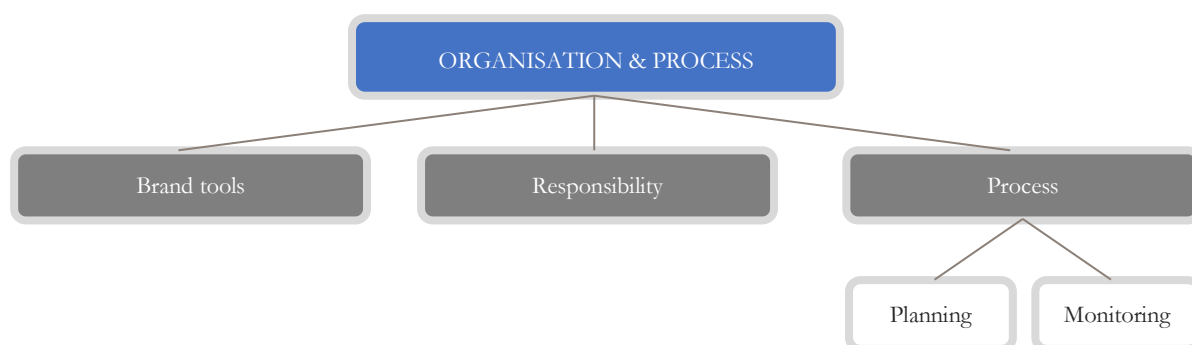
The **creative platform** should be Leonians **sharing** their history, stories, myths and legends, their arts, their music, their crafts and the love they feel for **their** land, recalling the Honourable Minister of Tourism and Culture's words:

“That woman working the land, that young boy selling fruit on the beach, that man on his akada in Kabala, the musician, the dancer, the town crier, the weaver, it's a whole song and it needs to be communicated.”



Brand organization

Ensuring that the brand is protected and built requires organisation and process:



The following **brand tools** will contribute to ensuring brand discipline:

- A *brand manual* has been developed consisting of:
 - A summary of this brand strategy.
 - Construction and correct application of the brand identity.
 - Guidelines on visual language.
 - And application of brand identity and visual language to a selection of branded collateral.
- In addition it would be useful to have a *quick reference brand identity application guide* in the form of a poster.
- A *Brand Kit* should be created. This is essentially a dynamic filing and reference system for all brand collateral.

As regards **responsibility** the following applies:

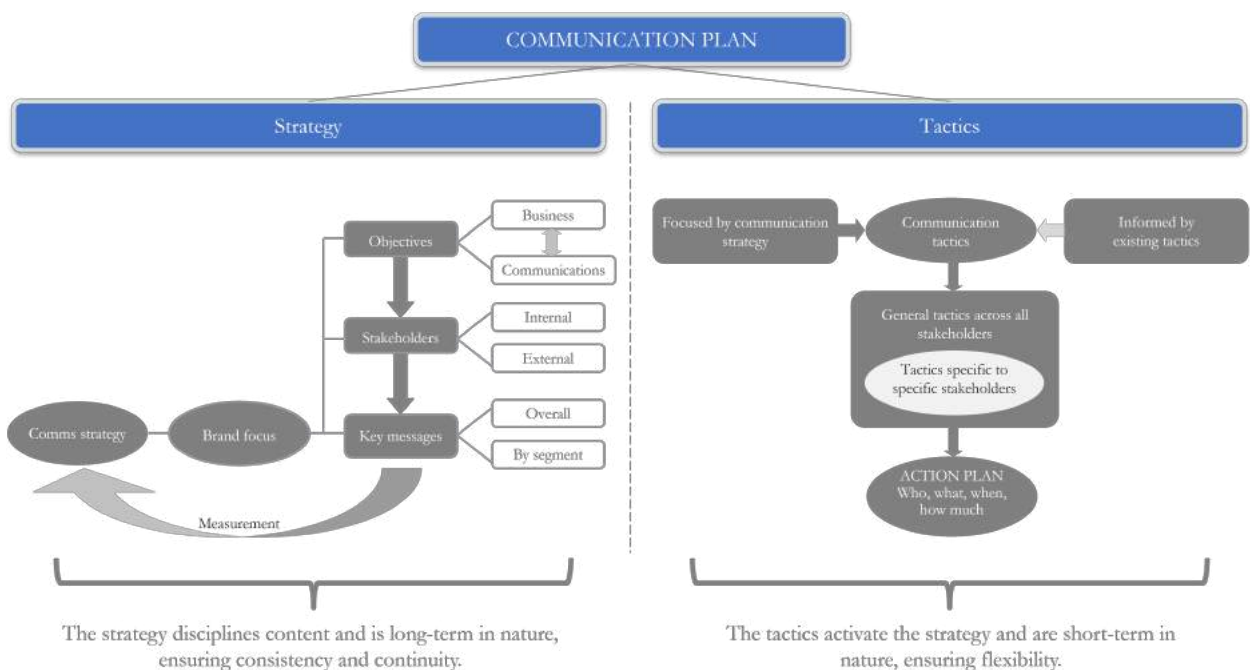
- The *Brand Owner* is the Honourable Minister of Tourism and Culture.
- The *Brand Manager* is the General Manager of the NTB.

- The *Brand Champions* are the NTB led by the NTB Marketing Manager. There should be regional representation in the Brand Champion team.



As regards **process**:

- The marketing strategy directs how to promote tourism to Sierra Leone over the short, medium and long term. It would be useful to have an annual *Marketing Communication Plan* in place using a methodology similar to this:



- The above methodology concludes with an *Activity Schedule* that creates accountability. It would be useful to have *Activity Updates* on a fortnightly basis so that a cadence of accountability is created.
- It is essential that the Brand Champions receive *training*. The first phase of this has been implemented. In addition:
 - A *brand induction* presentation and process needs to be built and implemented to ensure any newcomers to the NTB Brand Champion team are properly onboarded in brand terms.
 - On an annual basis all NTB Brand Champions should take part in a *Brand Refreshment Conference* with one of the deliverables being an update to the brand strategy and the brand manual.

Appendix 3: International tour operator brand validation interviews

Introduction and context

With the brand strategy for Sierra Leone's destination brand at draft stage and entering the validation process, it was appropriate to talk to some of the tour operators who had been part of the tour operator research (Tour Operator Market Report 04/05/2021) that was a valuable input to the brand strategy.

The purpose of the in-depth interviews was to get tour operator reaction to the proposed brand positioning and brand identity.

The following tour operators were interviewed:

Name	Tour Operator Company	Country
Johannes Soeder	Akwaba Africa	Germany
Karin Stoss	Kalahari Africa	Germany
Alison Steel	Naturetrek	UK
Helen Kennedy	Rainbow Tours	UK
Rob Morley	Tailormade Africa	UK
Florine Herendeen	Journeys International	USA

Experience of West Africa in General and Sierra Leone Specifically

As a warm-up question they were asked about their experience of West Africa in general and Sierra Leone specifically.

Two of the tour operators interviewed had been to Sierra Leone and they genuinely sang its praises with emphasis being on:

- An alternative destination, off the beaten track.
- Easy in terms of time zones (Europe), and language (English speaking).
- Beautiful beaches and rainforests.
- Warmth of the people, varied culture and not feeling exploited.
- And history with emphasis on family connections.

For those without experience they are mostly only aware of the negative narrative of war, Ebola and the landslide, although one had thoroughly researched Sierra Leone and its assets.

As for West Africa generically it is seen as a destination for those interested in varied and colourful cultures with a historic context.

Prioritization of attractions

When asked to choose which was more important as a saleable attraction, places or people, only one of the tour operators chose place over people but clarified this by saying that her agency specialized in wildlife.

All the others prioritised people over place:

- **Culture.**
- **History** and how history influences culture.
- **Interaction** with locals, meeting people who are / live differently to at home.
- **Learning** about cultural diversity.
- History, especially as it relates to own **heritage**.
- Learning things that add to dinner party conversations at home.

One of the operators said it was about people, but they were *people in place* – so you can't really prioritise.

But the point was made repeatedly that it is **difficult to differentiate on place** because there are beautiful places all over the world.




Positioning Culture vs. History


When asked what would appeal to their audience more, history or culture, there was a clear split:

- Culture because it has a wider, less specialist appeal.
- History because it gives culture context.
- **Can't split them, history is an essential part of culture.**

Sierra Leone has lots to offer...



Overall our tour operator research indicated a preference of people over place. What would you prioritise, culture or history?



Positioning: Freedom vs Love of Life

Presented with the two possible positioning value propositions there was equal support for both, with one of the tour operators saying they were both as appealing as the other.



We tried to capture this in two positioning statements...

ESSENCE	
Freedom	Love of life
RATIONALE	
<p>Sierra Leone is so deeply steeped in freedom that it has come to be defined by it, reflected in a way of life that both understands and embraces peace and unity.</p> <p>Treasure valuing freedom belongs to those who have been benefit of it and then have earned it back again by overcoming conflict and from a history that includes those slaves of forced slaves that have come hopefully to these shores.</p> <p>And so, as the anthem proclaims, Sierra Leone is the realm of the free and it invites you to explore freedom.</p>	<p>There is such an exuberant sense of pure joy and happiness that surrounds you in Sierra Leone, in the free and easy warmth, friendliness and helpfulness of its people.</p> <p>The colourful cultural diversity is united in its resilient determination to be genuinely hospitable, kind and protective.</p> <p>Here you will find it easy to leave your troubles behind you and rediscover yourself.</p>

Which do you prefer?

But **freedom trumps love of life** because it is a unique and genuine **differentiator** for Sierra Leone while love of life is claimed by many African destinations.

We tried to capture this in two positioning statements...

ESSENCE	
Freedom	Love of life
RATIONALE	
<p>The <i>freedom</i> positioning concept is powerfully authentic to Sierra Leone because of its history, e.g.:</p> <ul style="list-style-type: none"> Bunce Island The Freedom Tree The Maroon Church Thomas Peters Bai Bureh Madam Yoko A capital City called Freetown. <p>It is a positioning concept that also begins to change the negative narrative of the civil war by drawing attention to the positive narrative of Sierra Leone's history.</p> <p>Sierra Leone's history of freedom is fact, the most powerful differentiator possible.</p>	<p>Where the <i>freedom</i> positioning is substantiated by facts of history, this <i>love of life</i> positioning concept is emotionally subjective – it is a feeling rather than a fact.</p> <p>It is also not a differentiator. Both Ghana and The Gambia use a version of it in their positioning:</p> <div style="display: flex; justify-content: space-around; align-items: center;">   </div> <p>If the tour operator research is taken into account what is shown is that culture is the generic positioning for West Africa, so Sierra Leone in effect already have this as a property by virtue of geography.</p>

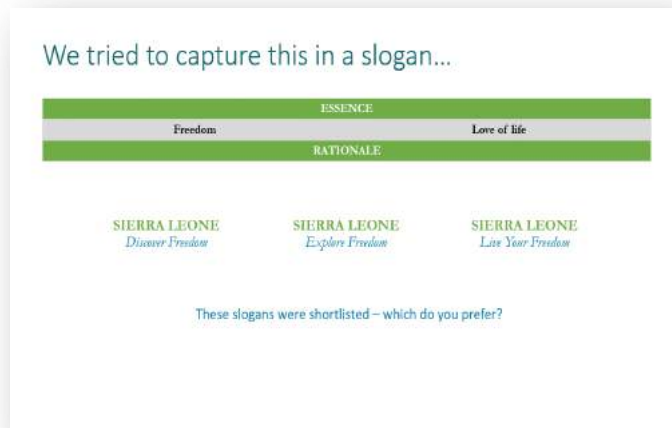
Does this make sense?

Slogans

The slogan that got the most support was *Live Your Freedom* because both *discover* and *explore* are over-used.

Explore Freedom was second favourite because it imparts that there is lots to explore, while *discover* feels once-off and limiting.

But **all of them work for the tour operators because *freedom* is so appealing** to their markets.



Brand Identity

Only one of the respondents preferred the middle one (shows variety), while there was equal liking for both the left and the right because they show content:

- Left preferred because of being more wild and adventurous.
- Right because of its shape.



Once they have recognised that the one on the right was an expression of the flag it became the preferred choice.

Conclusions

- **Freedom positioning** supported because it is a differentiator and authentic.
- **All of the slogans work** because 'freedom' is appealing.
- **The 'flag' brand identity** is preferred for its shape and as a representation of nationhood.

Appendix 4: Results of regional stakeholder workshops

Eastern, Southern and Northern Region Workshops

Question 1: What experiences and attractions in your region can you offer visitors?

	EASTERN	SOUTHERN	NORTHERN
Hospitality	- Hospitality & Security	- Outstanding Hospitality (friendliness), & security, tolerance of ideas and people	-
Nature: Beaches and sea activities	- Miami Beach, Kailondo Beach, Makona Beach, Aqua Beach Tongo	- Turner's Peninsula – 110km - Sulima Beach – 45km - Gbaima Songa Beach - Magbema Beach - Tobanda Beach - Scuba Diving at Bonthe - Fishing	- Roland beach, - Manungor Beach - #1 beach - #2 beach
Islands	-	- Tiwai Island - Different species of fauna and flora - Turtle Island - Bonthe Island	- Tasso Island - Bunce Island
Mountains, hills, rivers, waterfalls, forests, nature reserves and parks	- Kambui Hills - hiking - The Gola Rain Forest (National Park) - Mamba Hills – Kailahun - Congor Waterfalls (3rd highest falls)	- The Kangari Hill Reserve - Mokañi Hills – Rutile; Kunor Hills at Mongere (Kpowabu Village) - River Rhymes: Crossing of one river twice (River Wanjei District Pujehun) . - Rivers and streams Sowa, Jong, Wanjei, Moa, etc. - Pujehun Island-Gola Forest - Candy Mountain	- Bintumani Mountain: Kabala (highest in SL) - Wara Wara Bafodia Hill - Camel Hill – Binkolo Hydro - Hydro Waterfall – Gbonguna - Outamba Kilimi National Park - Wusum and Mena Hills - Kangarie Hills - Kunsho Hills - Loma Mountain - Bankasoka Waterfall - Lake Sonfon (mystical powers/landmarks) - Ferengbeia Hill - Wara Wara Mountain (hiking, stories about mountain) - Wusum (husband) and Mena (wife) Hills – according to stories - Camel Back Mountain (Biriwa Kingdom) - Bintumani Waterfall - Bumbuna Hydro Waterfalls - Maroto Waterfalls - Sarkachemeh Hill - OKNP
Wildlife and birds	- Gola Malimbe - Gola Forest: pygmy hippo,	-	-

	EASTERN	SOUTHERN	NORTHERN
Agriculture tourism and food	<ul style="list-style-type: none"> - Local food: Mende delicacy – Pemahun (potato leaf with rice) Lafidi (rice, palm oil, okra) - Cocoa and coffee: 1920 origins (Chocolate consumed in England) - Palm Oil and Palm Kernel 	<ul style="list-style-type: none"> - Palm Oil Plantations - Socfin Pujehun - Agriculture: Turmabum - Rice Farm, - Sierra Tropical - Samalane - Cultural Foods: - Pemahun (rice & potato leaves steamed) Typically southern region - Cassada (cassava) and burnt fish – staple food for riverine areas - Peila - Bo Gari - The Bully Land (fertile land): Tormabum, Sulinma 	<ul style="list-style-type: none"> - Rice - Research - Food: - Rice (Wala Rice) – more than any other regions - *Palm Wine (Omolay) - Gbindi for cattle rearing - Bully Lands in Bombali
Industrial Tourism (Mining)	<ul style="list-style-type: none"> - Diamond and gold mines(only in Eastern Region) / Kono region 3rd valued diamond in the world 	<ul style="list-style-type: none"> - Industrial Tourism : Mining sites, Gold mines - Diamonds, Rutile, Chromite - Bauxite (Vimetco company) - Sand mining at Gondama 	<ul style="list-style-type: none"> - Tourism industrial mining - Pepel Port
Arts and crafts, Traditional Music	<ul style="list-style-type: none"> - Five-finger print on a stone : Malegoth - Traditional Musicians e.g. Amie Kallon - Indigenous artists renowned all over the country - Mascarades: Jawe Mask, Fobu-Landa 	<ul style="list-style-type: none"> - Arts and Crafts Centre - dying, weaving, carving - Gara Tie Dying Centre 	<ul style="list-style-type: none"> - Bubu, Mada, Kondi (Traditional instrument, dance and music). - Gara tie dying. - Ronko & Lankonoh Cloth. - Rafia Bags
Cultural heritage	<ul style="list-style-type: none"> - War monuments - Slaughter House - Kailahun Court Barrie – Kailahun - Traditional attire (Friday tradition wear country clothes locally made in region) Condi Glei - Tombs of great warriors - Statues of Salia Koroma (accordion player) 	<ul style="list-style-type: none"> - The Caulker's Shrine at Bumpah – Ribbi Chiefdom - The mass grave in Tihun Sogbini – hundreds of people buried - Madam Yoko's gravesite: the first female PC (paramount chief) - Moyamba - Heritage writing (first Mende alphabet by Kisimi Kama in the Pujehun District that has also got outstanding mystical and marks - The great Bo School. 1906 establishment of Bo School that was established to give western education to sons and nominees of paramount chiefs - Cultural Groups: Kposowai Dance group. Alema* Disco (dancers), Pujehun *come together - Hassan Jallah - Alhaji Tokowa – The famous cannibal - Cultural legends / Heroes and heroine gravesites, e.g. Madam Ella Kablo Gulama, Sengbei Pich, etc. 	<ul style="list-style-type: none"> - Grave of Bai Bureh – Hut Tax War – Kasseh Village - Grave of Foday Sankoh at Robenlay. - British War Graves at Kasseh Village. - The Tamaboro Fighters - Gbangbani -, Matorma -, Poro -, Ojeh -, Bundo Secret Societies - Bolobineh – Devil Port Loko Celebration annually - Mayanka Yeali - Makeni - Koromusu – Lusa Town Celebration annually - Rokon Village. - Panthala –Masimera

	EASTERN	SOUTHERN	NORTHERN
Other	–	<ul style="list-style-type: none"> MRU Bridge – Gendema – Border Crossing Point Georgian Style Building P-Z Building 	<ul style="list-style-type: none"> Centre of Sierra Leone - Yele Great and little Scarcies First Democratic President

Question 2: From this list, what are the top 5 experience and attractions that make your region different and/or special from others in Sierra Leone

	EASTERN	SOUTHERN	NORTHERN
Nature and wildlife	<ul style="list-style-type: none"> Gola Malimbe bird species (only in central Gola forest. Plant: Gilbertiodendron Gola Rainforest National Park Dodo Dam: Only dam in Eastern Region Togbo Hill: Cave – carved stone in form of chair and bed Natural Waterfalls and Virgin Forest surrounding the waterfalls : B.Kongor in the Gorama Mende Chiefdom Vanjeima Falls in the Nomo Yikidie Falls: Kiama Beaches : Moa Beach Miami (Mina Island)Beach Kailondo Beach Makona Beach Kamboi Hills Tiwai Island Pineapple Island (all pineapples are natural there and live crocodiles 	<ul style="list-style-type: none"> The Bo Gari Peninsula and Sulima Beaches Turtle Island Tiwai Island Bagho Hills Bonthe Island (former British Colonial hub) Monkey and Turtle Islands in the Moyamba and Bonthe Districts respectively Mokanji and Kunor Hills in the Moyamba and Bo Districts respectively 	<ul style="list-style-type: none"> Outamba Kilimi National Park Bintumani Hills (1,945m high) Bintumani Waterfalls Lake Sonfon Wara Wara mountain OKNO – Otamba Kilimi Bunce Island
Agriculture	<ul style="list-style-type: none"> Coffee and cocoa: Long history of cocoa show. 	<ul style="list-style-type: none"> Tomabum Bully Land for farming Coconut Oil production, Socfin Palm Oil Plantation 	<ul style="list-style-type: none"> Freshest vegetables produced in north
Industrial Tourism	<ul style="list-style-type: none"> Presence of gold and diamond 	<ul style="list-style-type: none"> Rutile (only mined in Southern Region) 	<ul style="list-style-type: none"> Largest deposit of iron ore found in Sierra Leone
Cultural and Traditional heritage	<ul style="list-style-type: none"> Dancing and drumming Secret Societies: Poro (men),Sande / Bondo Jawe Dance Blowing elephant tusk behind the chief announcing his presence) Buii in Mende. Grave sites of historical warriors – Kailondo from Kailohun District 	<ul style="list-style-type: none"> Madam Yoko’s gravesite Kakua Chiefdom Outstanding grave sites of cultural legends, heroes and heroines Mystical landmarks inherent in Pujehun District Galiness: Offer variety in accommodation, food, cultural artefacts, etc. 	<ul style="list-style-type: none"> Rogbonkoh Village (Sukublai – raffia craft workshop) Lungi International Airport Geographical Centre found in Sierra Leone – Yele

Question 3: What one picture would you choose to include on the NTB website to represent your region?

EASTERN	SOUTHERN	NORTHERN
<ul style="list-style-type: none"> - Kailondo - Kamboi / Kambui Hills: in Kenema Kamboi / Kambui Nimi (Kono) Gbanekando (culturally has different names in different districts) - Kamboi Hills (long hill that passes through the Mano River nations) 	<ul style="list-style-type: none"> - Bo Gari - Tomabum Bully Land for farming (picture of rice paddy) - Tiwai Island - Bonthe Island 	<ul style="list-style-type: none"> - Bintumani Mountain - Slavery chains and shackles at Bunce Island (repres how we freed ourselves from slavery and how we freed our minds. Represents emancipation of Sierra Leoneans not only from slavery, but from our minds)

Question 4: What should be done to better develop and present these top experiences and attractions to visitors?

	EASTERN	SOUTHERN	NORTHERN
Security	<ul style="list-style-type: none"> - Strengthen security in the country - Law enforcement (abide by those laws so that visitors are inspired to follow) 	<ul style="list-style-type: none"> - Policy review and regulations (laws that protect visitors) - Security apparatus should be put in place to safeguard these sites, e.g. police 	<ul style="list-style-type: none"> - Rules and regulations. Law enforcement - Effective security planning. Signpost directions and security for tourists
Infrastructure	<ul style="list-style-type: none"> - Improve infrastructure - Accessibility for visitors - Improve energy and power 	<ul style="list-style-type: none"> - Provision of basic infrastructure: electricity, water, communication - Accessibility: Improved road and sea network. Fine roads, air transport, vehicles, boats, gears, jetties to be cleared 	<ul style="list-style-type: none"> - Infrastructure development. Better roadworks - Accessibility to tourist sites - Basic lights and sanitation facilities - Basic health facilities, e.g., first aid
Quality and standards, capacity building	<ul style="list-style-type: none"> - Capacity building and skills development, e.g. tourist guides. 	<ul style="list-style-type: none"> - Quality service delivery (standards) - Capacity building through skills training 	<ul style="list-style-type: none"> - Quality service delivery (training of service providers) Awareness raising (sensitisation) - Skills development, capacity building for workers - Capacity building through skills training: Customer Care - Provision of improved standards of hospitality and facilities at the site. Provision of improved research centres on site (library and information centres)

	EASTERN	SOUTHERN	NORTHERN
Policies, political will to invest. Regional offices	<ul style="list-style-type: none"> - Establish tourism NTB Regional and district offices - Prioritise and improve the tourism sector (improved budget allocation) - Political will to invest in tourism - Policy review, regulations and enforcement 	<ul style="list-style-type: none"> - Budget allocations for tourism sector - Political will should be ready to actualise these dreams 	<ul style="list-style-type: none"> - Formulate regional policies and enforce these - Political will of the government for better development - Coordination and collaboration among indigenes and rulers
PPP	<ul style="list-style-type: none"> - Community engagement. Citizens of the region should take legitimate ownership of this heritage - Encourage public-private partnership approach 	<ul style="list-style-type: none"> - Public-private partnership - govt should work on PPPs to improve on these sites - Active participation of locals – local constitution provides for local participation, with tourism no one behind - Relevant stakeholder engagement with tourism sector 	<ul style="list-style-type: none"> - Public-private partnership in collaboration with local communities. Must get enrolment from local communities - Stakeholder engagement to explain what is being done from a tourism perspective and benefits, e.g. Chiefs
Sustainability	<ul style="list-style-type: none"> - Value chain addition to local products: Promoting consumption of local content like cotton cloth and rattan chairs to inspire locals to create and buy local. 	<ul style="list-style-type: none"> - Sustainability plans 	<ul style="list-style-type: none"> - Alternative source of livelihood (sustainability) - Development of local materials, e.g. cow dung floors to attract tourist – authenticity of experience
Development and management of tourism sites	<ul style="list-style-type: none"> - Develop tourism research to I/D all tourism sites in the regions - Review regional by-laws for the protection and preservation of our natural and cultural heritage - Establish a defined management structure - Good coordination and collaboration between tourism service providers at each tourist site / destination in the region. - Protection and conservation of wildlife and forest 	<ul style="list-style-type: none"> - Inventory / database of tourist sites - Improve and develop facilities at tourist sites and destinations - Establishment of improved management structure - Establishment of tourism committees to regulate the activities at natural and cultural sites - Eco-tourism and environmental protection (protection of wildlife, as well as maintain our natural habitats) 	<ul style="list-style-type: none"> - Monuments and relics commission identifying and proclaiming all attractions as national attractions - Strategies and structures need to be developed to maintain these tourist attractions should be in place - Maintenance of tourist centres - Conservation, Accessibility and - Preservation
Marketing and branding, awareness	-	<ul style="list-style-type: none"> - Packaging and rebranding: Preservation and conservation of the natural products (extend length of stay) - Massive media engagement to sensitise citizens on the value for money relating to tourism 	<ul style="list-style-type: none"> - Organising workshops at intervals for youths, telling them about the potential for tourism - Tourism showcase in agricultural shows, trade fairs - Effective communication and marketing strategy – to tell people what I have.
Hospitality	-	-	<ul style="list-style-type: none"> - Hospitality (friendliness of the people)

Question 5: What communication channels and methods do you think would be the best for telling Sierra Leoneans about your region?

	EASTERN	SOUTHERN	NORTHERN
Social media	- FB, Twitter	- WhatsApp, - Facebook , Twitter	- WhatsApp, Instagram, etc.
Electronic	- TV - discussion live - Jingles	- Tourism websites - TV, - jingles, - Vox-up (People's views about tourism)	- Video clips, - Television - Website for Northern area
Printed Media	- newspaper, magazines, - Billboards, - posters, - flyers - Signage showing where tourism sites.	- Newspapers, magazine, - Billboards - flyers	- Newspapers Magazines - Brochures - Visitors Guides - Pictorial evidence - Flyers, - billboards
Radio	- Radio – discussion live	-	- Radio discussion
Exhibitions, shows	-	- Through annual eco-festivals	- Cultural festivals, annual festival – each tribe/kingdom, etc to share their culture
	-	-	- Tourist market, exhibitions
Drama	- Community Theatre and Drama. Cultural shows dramatising the message of <u>tourism and culture</u>	- Music and drama (sending information through music or drama, e.g. Salia Koroma, Amie Kallon) - Radio serial dramas like comedy Atunde Ayenda program (tells us what's happening in the country in a drama form)	-
Town Crier	- Meeting with <u>town crier</u> informing that stakeholders are coming and narrating story to the community	- The town crier (local dialects)	- Local town crier- public awareness
Secret Society	-	- Secret societies: Wonde, Sande, Poro	- Secret Societies
Religious leaders	-	- Religious heads: Pastors, Imams, Sheikhs through sermons)	- Religious Leaders, e.g. Imams, Pastors
Celebrities	-	- Making use of celebrities (influencers)	- Workshops
Education programs	- Tourism education to be included in school syllabus - Community engagement and public education programs (citizen engagement) - One-on-one info dissemination	- Use of traditional languages (speaking the local language, msg goes right to their heart) - Community outreach programs – go into community to explain the way forward with real outcomes	- Workshops - Creation of special curriculum of tourism at school so that kids grow up with tourism mindset - School heritage clubs - Travel advisory

Question 6: What would you like visitors to say to their friends and family after they've been on holiday to your region?

	EASTERN	SOUTHERN	NORTHERN
Hospitality	Good hospitality, tolerance, friendship	Hospitable to international and local visitors. (warm people, warm reception)	The people are peaceful, friendly and hospitable
Security	Peace , Security & unity	They should feel secure and peaceful Regional cohesion (no in-fighting within regions)	The place is very secure
Culture	Very unique traditional and cultural heritage, <u>cultural</u> diversity.	Traditional and cultural heritage (growth centre – weaving and Gara tie dying / Gbaima Songa Basket weaving), the way we dress	Cultural heritage. Cultural diversity with unique cultural heritage (one region with many tribes)
Nature	Landmark beautification – pristine natural landscapes and diversity – hills, mountains, swamps, savanna and forest	Unique landscape (Gbagbor Hills, Kandy Mountain, Kunor Hills at Dambal	Unique landscapes, natural beauty
	Unique natural beaches and thick forest with wildlife	Natural beaches, e.g. Sulima, Magbema, etc.	
	Experience in hiking, excursions to islands		
Eco-friendly	Eco-friendly tourism site	Show them that the country has natural and eco-friendly environment.	Environmental protection, eco-friendliness
Food	Very excellent natural foods, fruits and vegetables	Fresh, cheap and sweet fruits and vegetables (mangoes, oranges, pineapples, apples, tomato, cucumber) – the 'sweetness' of Bo	Fresh fruits and vegetables from the land
Religious tolerant		Religious tolerance	We are both political and religious tolerance
Weather	Weather conditions – changes throughout the day		
Higiene		Hygiene	Cleanliness, hygiene and sanitation
Investment potential	Huge investment potential: Diamonds vs Tourism (latter lives forever)		
Accommodation		Comfortable accommodations	

Western region

QUESTION 1: On what basis could Sierra Leone be differentiated from competitors

Marine and aquatic life.:

- Best beaches in the world – Turtle Islands incomparable with any other beach in the world. River No. 2, Black Johnson (three sand colour beach)
- Scuba Diving and water sports
- Boat and canoe riding

Culture, Heritage, Religion and Hospitality:

- Culture: Krio Language, African attire, wedding, naming ceremony
- Traditional displays, e.g., Poro Society, Sande Society
- Food: Cassava Leaf, Potato Leaf, Krain-Krain
- Hospitable People - friendliness
- Heritage: Base for colonial heritage, e.g. Bunce Island
- The grave of Mammy Yoko
- 3Ps: Peace – People – Pride (focused approach which differentiates us) > no longer war-torn. Focus on authenticity of the country
- Religious tolerance
- Unity / Cohesion demonstrated in inter-marriages
- Cultural Heritage (hub for slave trade). Was not a transit point. Was a holding point. Only country in world SRA / resistance to slave trade movement, i.e. caves in Wara Wara Hills / abolition of slavery role / repatriation of slaves to Sierra Leone
- First university and schools in West Africa

QUESTION 2: What types/segments of travelers should we aim to attract?

- Beach Tourism
- Eco-tourists
- Bird watchers
- Adventure Tourist, e.g. hiking
- Sports tourists
- Artists (influencers) > musicians, bloggers
- Heritage Tourism* (homecoming / roots / diaspora)
- Leisure tourists
- Business investors
- Agro-tourists, Kabala, Kenema (vegetable farming)
- Sex Tourism (not official but in practice is happening)
- Low to medium tourism influx and not mass tourism. The Gambia promoting cheap tourism which is not what we need. More luxury than cheap.
- Domestic tourists

QUESTION 3: How can our products be best presented and packaged to appeal to these travelers?

- Standardization based on international best practice - Training hotel, restaurant, tourist sites staff
- Health and safety - Global health response, e.g. Ebola and COVID
- Political stability and will to improve tourism
- Strengthening of tourism policies and regulation + enforcement. All of government approach needed / Involvement of our diplomatic missions
- Public-private partnership should be encouraged
- Variety of travel circuits, not just in Freetown - shift attention to other parts of the country and ensure there's accessibility and product in these areas
- Events (Calendar of Events with set annual events for consistency)
- Social media influencers, e.g., bloggers
- Integrate technology in tourism services, i.e., payment methods (POS in all hotels), banking, forex, accept credit cards, Internet facilities
- Develop a tourism bubble in TDAs, e.g. souvenir sales

QUESTION 4: Vision for Sierra Leone tourism in 2035 in terms of:

- A. What the destination is known for internationally:
 1. Leisure tourism, cultural heritage tourism, wildlife conservation – pygmy hippo
 2. History – shift the narrative. Integrate our history, i.e. where we're going.
 - the Athens of Africa. Citadel of learning in West Africa. Fourbay College. Slave trade > colonialism > 2nd WW > Sierra Leone 4th most peaceful country in Africa
 - Heritage Tourism (DNA test – North America original relationships with Sierra Leone)
 3. Lovely beaches. Difference is that our beaches have distinct characteristics, e.g. vegetation fringe on beach
 4. Eco-tourism. Sustainable environment, Ecosystem preservation
- B. Its tourism position in West Africa:
 1. Leading tourism destination for ecotourism and cultural heritage
 2. Under top 5 destinations in Western Africa for the diversity of attractions.
 3. One of the leading tourist destinations in terms eco – and heritage tourism
- C. What kind of tourism development do we have?
 1. Unique ethno-cultural diversity present in Sierra Leone. Religious tolerance
 2. Blend of everything e.g. wildlife, eco-tourism, beaches
 3. Public-Private Partnership
 4. Review national policies on tourism
 5. Tourism infrastructure, i.e., accessibility, first aid skills in hotels for example
- D. What tourism will mean for the environment and community
 1. Economic diversification, job creation, improve livelihood of citizens, protection of eco-system
 2. Enrich their own communities e.g. through infrastructure development like water
 3. Livelihood for the community, Revenue generation for government, Emergence of new tourist sites
 4. Generate income in tourism-based communities
 5. Saves environment by having more protected areas
 6. Job creation

QUESTION 5: What is Sierra Leone's Brand Promise

- Beauty
- Land of freedom
- Sierra Leone... a paradise for you
- Rediscover yourself
- Life is beautiful

QUESTION 6: What slogan summarizes Sierra Leone's brand promise?

- The beauty of Africa lies in Sierra Leone. Most of the things that Africa is admired for, you find in Sierra Leone.
- Life is beautiful
- Experience It (experience our freedom)
- A cottage of care (real helpfulness)

QUESTION 7: How would you visualize the brand promise in a brand identity?

- Mountains and chimps
- Cotton Tree
- A smiling heart with open arms (symbolizing a willing heart to accept you)
- Shuku Blai (green, white and blue)
- Red, white, and black colours > dissuading people

QUESTION 8: How should we give expression to Sierra Leone in terms of the senses?

- Sound: Roar
- Sound: Serenity
- Sound: Talking Drum
- Aroma: Sea breeze
- Aroma: Fauna & Flora
- Aroma: Coffee Smell
- Taste: Sweet (Sierra Leoneans are sweet people)
- Taste: Palatable cuisine
- Taste: Cassava leaves
- Texture: Soft (Also attributed to people)
- Texture: Cotton wool
- Texture: Country cloth
- Visually: Sea
- Visual: Sight of paradise on earth
- Visually: Unique landscape
- Visibility: Peaceful coexistence