

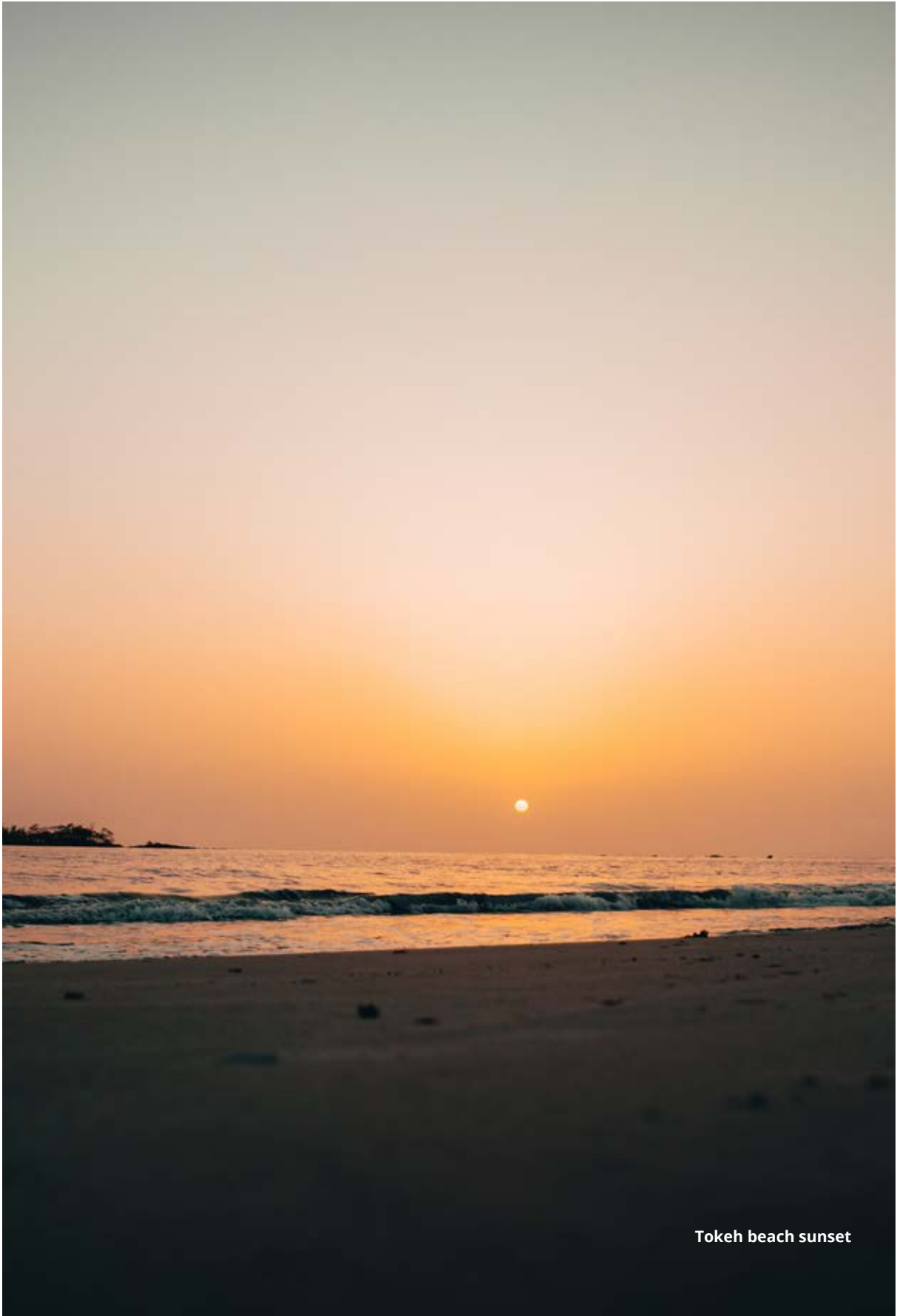
E TOURISM:

A Strategy for Enhancing Effective Service for Sustainable Tourism in Sierra Leone through Suitable E-Commerce and Development of Information Systems



Enhanced
Integrated
Framework





Token beach sunset

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Hippos at Outamba Kilimi National Park



Chapter 01

1. Background

Tourism is a significant component of Sierra Leone's national economy, contributing about 4.8% in 2020 and representing many jobs in the country. However, trends indicate there has been a sharp decline in tourism contribution, with the most significant drop occurring in 2020.¹ This period was the period of the Covid-19 Pandemic, and the industry experienced severe shocks as lockdowns and safety measures were instituted.

The tourism industry in Sierra Leone has shown tremendous potentials and vibrancy. However, the 2020 Tourism Census shows that out of a total of 459 accommodation facilities in the country (hotels, guest houses, restaurants, casinos, bars, night clubs), 56% of the facilities were registered with National Tourist Board (NTB) whilst the remaining 44% were unregistered. The study also revealed that guesthouses accounted for 44.4%, followed by restaurants at 26.2%, hotels at 18.6% and nightclubs at 10.8%. In addition, many of the unregistered businesses claimed to have limited knowledge about the services of the National Tourist Board (NTB) or the Ministry of Tourism and Cultural Affairs (MTCA).

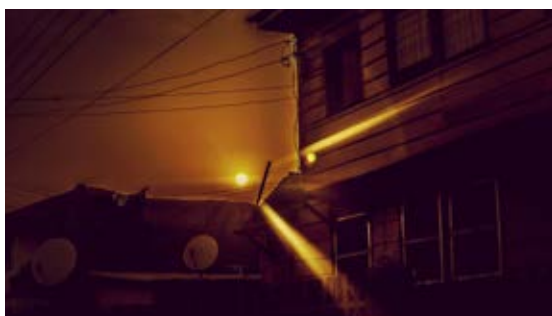
In common with other sectors and tourism in other countries, the industry needs to take stock of the revolution in communication technologies and adapt to the emerging 'digital economy'. Some 25% of the country's population are now able to access the Internet.² This growing use of the Internet provides massive opportunities to reach new markets and to improve business efficiency. In addition, e-tourism can make the industry more robust and more able to respond positively to crises.

The tourism industry is hindered, however, by a lack of joined-up communication facilities. The principal challenge is its fragmented nature, reflecting the predominance of small businesses, making communication and consolidation of information difficult both within the industry and consumers. Therefore, national and Regional Tourist Boards (RTBs), Destination Management Organizations (DMOs) and Tourist Information Centers (TICs) need to harness new electronic marketing opportunities to make it easier for consumers to purchase the Sierra Leonean tourism product. This Strategy sets out a framework within which tourism in Sierra Leone can make the best use of new information and communications technology. In turn, this will enable Sierra Leonean tourism to realize new opportunities, provide more effective visitor services, and enhance the industry's performance and competitiveness.

Further to this, the ministry of tourism and cultural affairs will benefit from increased efficiency in coordination and consolidation of information within its various departments and constituent agencies. Thus, this development will provide opportunities for more secure delivery of services, collection, processing, and analyzing data for efficiency. The Strategy will also consolidate processes for streamlining the flow of information within its sector, agencies or departments, and externally across ministries, departments and agencies of government, service providers, operators, investors, tourists, workforce learning institutions, among others.

a. Context

The National Tourist Board (NTB) is the statutory body charged with developing and marketing Sierra Leonean tourism. It is committed to creating an industry that strives for high quality, is responsive to market needs and promotes



Board ose sunset



Women pound plasas at a community in Bo

wise and responsible growth throughout the tourism industry. Given the profile of new electronic media as marketing and distribution channels, one of NTB's key priorities is to focus on the potential of e-tourism and to work towards solutions for the industry as a whole. This priority fits well with broader Government objectives at the Ministry of Tourism and Cultural Affairs for access, adoption of information and communication technologies (ICT), and support for small business. NTB currently operates a marketing website (ntb.gov.sl) where the industry is marketed to local and international tourists with beautiful depictions of the Sierra Leonean experience. Thus, this Strategy seeks to explore ways of supporting the agency to improve its service delivery and provide innovative solutions to businesses and the sector holistically. Beyond this target, the Strategy will map out how interactions with other ministries, departments and agencies are supported through e-communication.

b. Definition and Concept of e-Tourism

The term 'e-tourism' is used in this document to refer to e-tourism or e-commerce in the field of travel and tourism – i.e. the use of ICT to enable tourism service providers and destinations to operate more efficiently, and to reach and serve consumers more effectively with facilities to search, compare and book tourism products. E-tourism embraces new media, such as Mobile Applications, the Internet and email, and enables more efficient use of social media such as Facebook, Instagram or Twitter and traditional media such as brochures and advertising. In addition, it incorporates the ability to conduct sales online, with fundamental implications for the way businesses work. E-tourism has the potential to transform how companies or organizations function through integrating

systems for management of stock or availability (e.g. of hotel rooms), procurement of supplies, financial administration, marketing, sales and other transactions. The Internet provides direct access to consumers and is a tool for business-to-business communication. Increasingly, it will offer consumers and intermediaries far richer information, increased choice and the facility to make bookings immediately. It will also provide tourism organizations and businesses with the tools to promote, communicate and transact with consumers and other tourism businesses.

c. Strategic Vision and Objectives for e-Tourism in Sierra Leone

i. Mission

The mission is to create an enabling environment for tourism to thrive by adopting the appropriate policies, legislation, and regulations in collaboration with critical stakeholders whilst attracting vital investment to benefit from tourism development fully.

ii. Vision

The vision for this Strategy is for Sierra Leone's tourism sector, including organizations and businesses, to become more competitive and profitable, capable of realizing the new market opportunities afforded by e-tourism, and skilled in using information technologies. We shall play a significant part in achieving this vision through the creation of the SLNet online tourism network, incorporating into its e-commerce capacity, add google maps and other relevant APIs for destination tracking, integrating with any available regional and local destination management systems and initiatives to promote e-tourism awareness and skills development.

¹ <https://knoema.com/atlas/Sierra-Leone/topics/Tourism/Travel-and-Tourism-Total-Contribution-to-GDP/Contribution-of-travel-and-tourism-to-GDP-percent-of-GDP#:~:text=In%202020%2C%20contribution%20of%20travel,ending%20at%204.8%20%25%20in%202020>. As accessed on January 20, 2021.

² Digital 2020 Report published by We Are Social accessed on 20th January 2021 on <https://datareportal.com/reports/digital-2020-sierra-leone>



iii. Objectives

The Strategy will accomplish the following objectives:

- To enable the National Tourist Board, enhance its service delivery within the sector
- To mobilize effective organizational and technical responses to assist the industry, especially small tourism businesses, adapt to the new e-tourism environment
- To improve the collection and dissemination of comprehensive and appropriate tourism information to meet the needs of consumer growth markets
- To improve business processes for marketing, booking and purchasing of tourism products
- To adopt the most relevant communications and technology solutions and management information systems at the Ministry of Tourism and Cultural Affairs and its agencies, National Tourist Board and MRC to support efficient service delivery in the tourism sector.
- To achieve a fully integrated e-tourism network for the Sierra Leone tourism sector.
- To support efficient communication and collaboration between the MTCA and MDAs as well as other tourism stakeholders.



Old railway station at Clinetown

2. SITUATION ANALYSIS: THE CURRENT CONTEXT OF THE STRATEGY

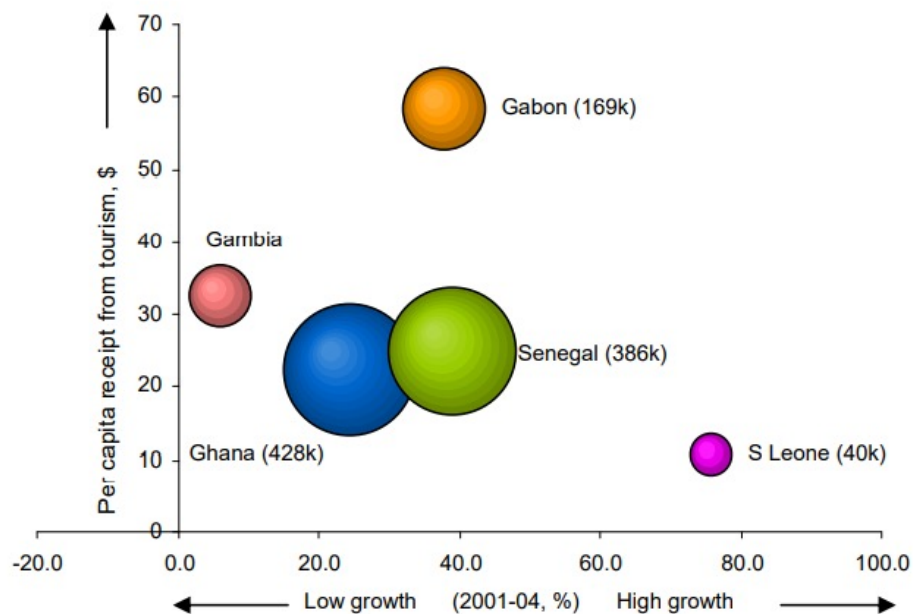
a. The Present Situation

In tourism, as elsewhere, the growth of ICT has been sporadic and sometimes reactive. A lack of resources has stunted development, while the absence of any national strategy has meant that systems have emerged on an ad hoc and uncoordinated basis. However, products such as central reservations systems (as used by travel agencies locally and internationally) have demonstrated that with proper planning and funding, ICT can improve consumer service and improve the efficiency and profitability of businesses, large or small. Unfortunately, many Sierra Leonean holiday destinations at the local and sub-regional level do not have systems to help Tourist Information Centers, especially those offered by the National Tourist Board,

to provide a better service. Local authority support can play a vital role in this development. Over the years, this support can be extended to include marketing, administration and research. Unfortunately, there is also no regional integration for the management of destination data.

Sierra Leone will try to contribute to this discussion by collaborating with other regional promotion agencies in Ghana, Gambia or Nigeria to coordinate the collection and dissemination of critical destination data for integration into a regional website that travellers can utilize.

FIG 4: Tourism competitiveness in West Africa

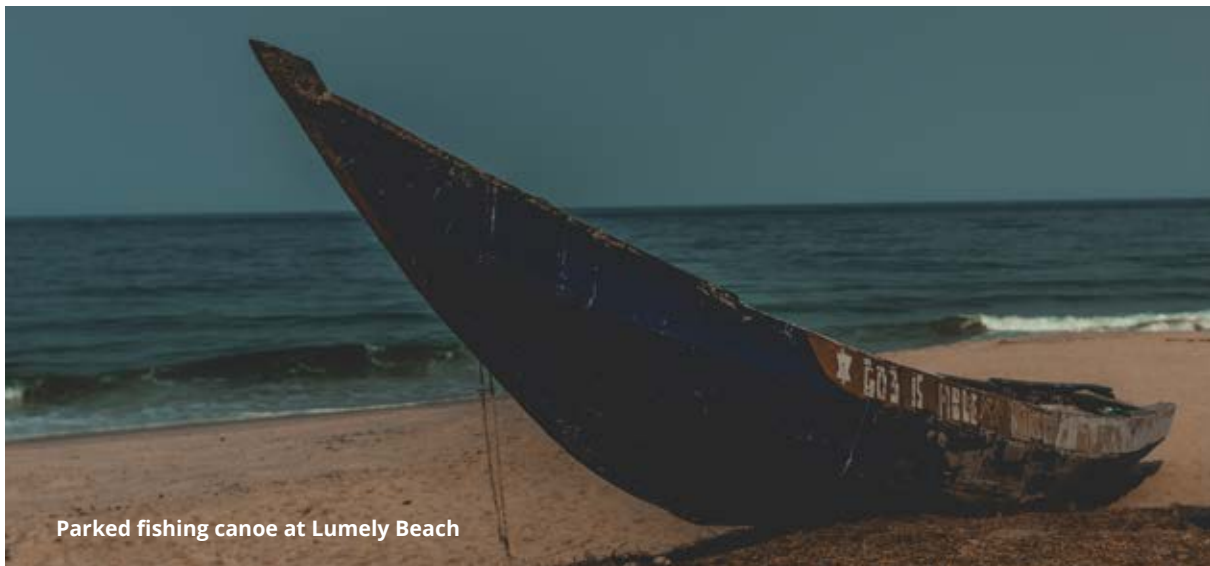


Note: Size of bubble shows no. of tourist arrivals

Source: UN/WTO

b. SWOT Analysis of the Sierra Leone Tourism Sector

<p>Strengths</p> <ul style="list-style-type: none"> • Pristine and high-quality beaches, hills and biodiversity • Geographic proximity to the market • Pleasant weather during peak season • Historical importance related to slavery • Historical emblem for freedom of slaves • Navigable rivers for water-based exploration • Low costs • Unique ethnic cultures • Higher security and social capital • Hospitality and service culture as an asset • Meagre HIV/AIDS ratio compared to other African countries 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Extremely unfavourable and unfair) country image • Self-imposed isolation due to limited air, water and land transport • Lack of connectivity within the country among various tourist sites • Lack of basic physical infrastructure (water, electricity, emergency health services) • Historical legacies unpreserved due to encroachment or indifference • Absence of even a primary supply chain • Somewhat disconnected from the feedback from clients and markets • Low capacity to market regionally or internationally • Lack of coordination among entrepreneurs and government • Lack of technical workforce • Lack of an overall critical mass
<p>Opportunities</p> <ul style="list-style-type: none"> • Successful peace-building process and sustained political stability that is slowly being recognized internationally • Global interest in the history of anti-slavery movement originating from the United States, or Obama-mania • Recent recognition among the sportsmen about the excellence of specialized fishing potentials in Sierra Leone • Opportunity to shape image as a newcomer, especially with pristine and unspoiled tourist sites • Saturation of neighbouring tourist destinations, e.g., The Gambia • Strong developmental interest locally and internationally, contributing towards the public goods and infrastructure • Formation of a new hotel owners' association and other business forums 	<p>Threats</p> <ul style="list-style-type: none"> • Regional image due to drug-trafficking and petty crimes • Government and market failures related to specific goods and services • Price levels too high compared to comparable tourist destinations • Adverse environmental and social impacts of tourism are mismanaged, as has been the experience with the mining industry • Mis-marketing without being backed by authentic quality control may destroy its opportunities • A high degree of poverty and limited law enforcement could lead to social unrest



c. **Lessons Learnt from Other Countries**

Not surprisingly, since e-commerce is a global issue, many other countries have invested in e-tourism. A review of experience in other countries reveals that several countries have adopted a collaborative national and regional approach to product data management as a platform for web-based marketing and distribution. While different in structure and degree of integration, these precedents support the Strategy proposed for Sierra Leone. It also makes sense for Sierra Leone to achieve as much consistency as possible with the database structures developed in other countries. In Europe, Austria, Finland, Sweden and Denmark all have fully integrated systems linking all parts of the tourism support structure. In Switzerland and the Netherlands, partnership web projects have been implemented at the national level, and participation is being extended to regional and local tourism organizations. The Netherlands Board of Tourism decided not to proceed with a planned public-private partnership company but instead fully integrate all aspects of e-business within its operations whilst still working in partnership with critical commercial players. In Germany, Belgium, France and Spain, the picture is more fragmented, with the main focus of activity at the regional/provincial and local level. Many different systems have been implemented at these levels in each country with a lack of consistency and interoperability. In all cases, except Belgium, there have been national initiatives to achieve a greater degree of coordination and establish specific basic standards.

E-Tourism in Africa is still a new phenomenon in most regions, especially in West Africa. While some advanced economies like South Africa make efforts, places like Kenya, which has enormous resource-based tourism opportunities, face numerous challenges following the recent adoption of e-tourism. For instance, in Kenya, various challenges affect internet penetration in organizations. These factors include purchasing expensive hardware, software and communication packages, cost of training new users, design and construction of internet accessibility, cost of hosting the website on an advanced server system, cost of regular maintenance and updating, marketing the online services and development of processes for dealing with internet accessibility among many others. These challenges are analogous to what this Strategy anticipates operating an e-tourism platform could produce in Sierra Leone.

Countries like Ghana, Gambia or Nigeria are also still at their inception stages in their attempts to institute e-tourism into their fast-growing tourism space, especially for places like Ghana and Gambia. These countries benefit from increased tourism opportunities, mostly related to the historical antecedents shared with countries like Sierra Leone.

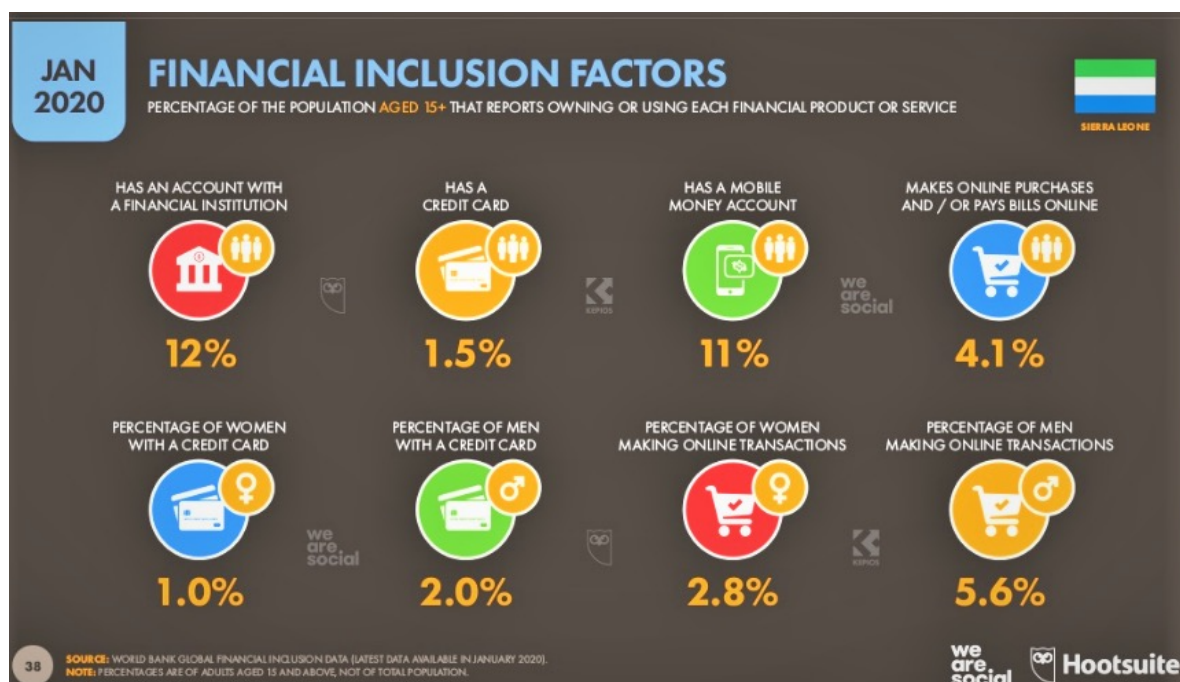
However, Ghana has done well to improve its infrastructural challenges where enormous investments have already been made.

The challenge with internet penetration in the region is not just isolated to a few parts. But while investments in the infrastructure are

ongoing, tremendous value is being placed on using existing social media platforms which have attracted very high uptake among individuals and businesses worldwide. This Strategy has noted these developments and recommends an

approach that incorporates the adoption of these solutions to addressing the infrastructural and logistical challenges in the continent

d. Critical Trends for e-Commerce and Management Information Systems in Sierra Leone.



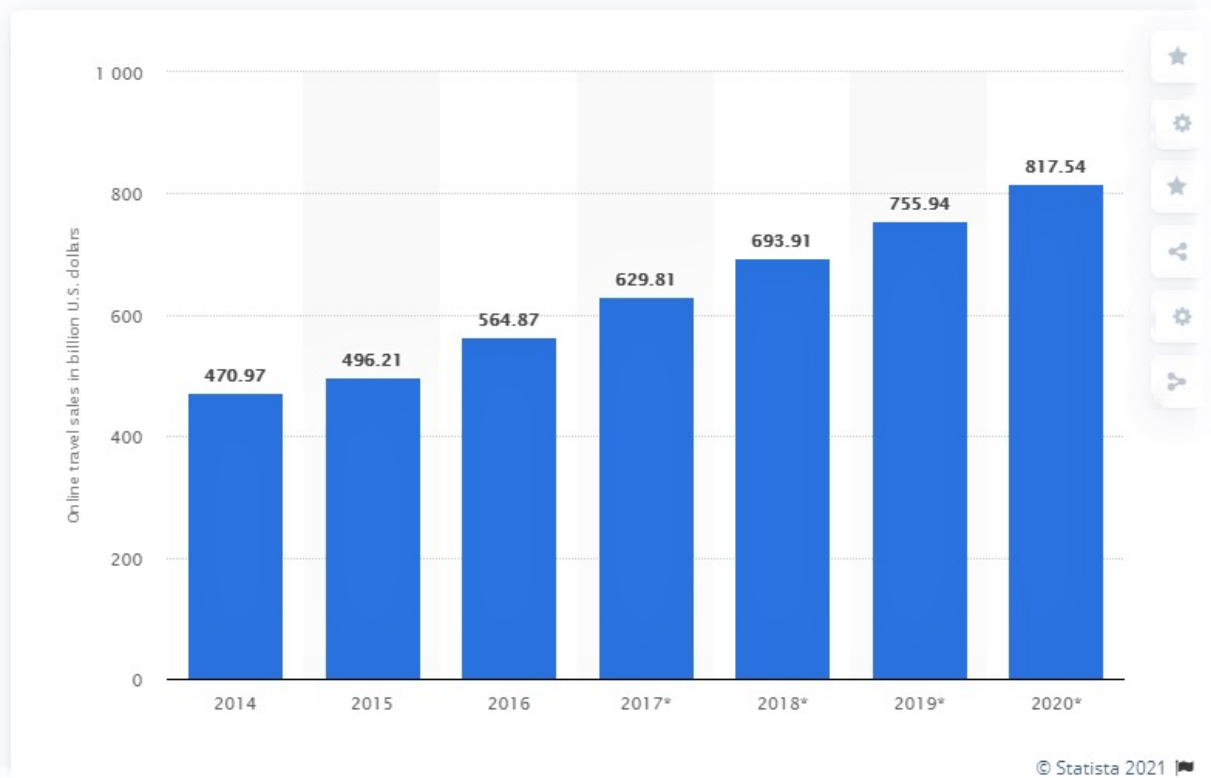
The key market trends:

- Use of the Internet has been increasing dramatically worldwide with a 67% penetration rate at 5.19 billion users – nearly ten-fold over the past decade. Growth is forecast to continue for the next five years, with web-enabled mobile devices helping to stimulate this trend. It is not yet clear when this is likely to reach saturation point or
- maturity, but some 25% of all Sierra Leoneans can now access the Internet.
- Increasing proportions of Internet users are buying online, with a current rate of 4.1% of Sierra Leoneans buying online – a trend likely to increase considerably over the years.
- Travel and tourism will gain an increasingly large share of the global online commerce market, from an estimated 30% today to around 50% in the future.



Digital travel sales worldwide from 2014 to 2020

(in billion U.S. dollars)



- The dominance of air travel has reduced from more than 80% four years ago to about 60% now, whilst hotels' share correspondingly has doubled to nearly 25%.
- Accommodation, car hire and other ground-based products are highly likely to gain a larger share of global online commerce in travel and tourism.
- User profiles broadly match the target markets of many tourism organizations – Internet users tend to be relatively wealthy, well educated, and interested in independent travel.
- value-added) of between 25% and 33%. Specific productivity benefits could include financial payments, cost savings and non-financial services, particularly in areas like business administration and marketing costs:

i. Economic Benefits

The economic benefits of e-business arise from gains in operational efficiency and marketing effectiveness. These benefits are virtually impossible to estimate accurately, but, in broad terms, it is reasonable to predict an increase in productivity (including efficiency gains and

- Potential areas to enable additional income generation will include sales of tourism products such as accommodation and short-term special offers via the web, electronic mail and other new media channels.
- Potential areas for cost savings could include reduced costs for publications – production costs, print runs and distribution; and savings in staff time – print production, enquiry handling, reservations, communications, etc.
- Potential areas for non-financial gains will include increased marketing effectiveness and quality of customer service and relationship, increased productivity, enhanced performance and better evaluation mechanisms.

- Whilst there would also be additional costs associated with e-commerce, such as online sales commissions, the net impact is likely to be positive.

ii. **Barriers to e-Tourism and Management Information Systems in the Tourism Ministry and NTB**

The main barrier to maximizing the potential of e-tourism is that a significant proportion of tourism businesses are not proactive in their use of technology and the Internet and appear to have limited awareness of the scope of e-tourism. Allied to this is that the whole online process can seem intimidating, time-consuming and financially prohibitive to smaller businesses. Thus, whilst electronic trading in tourism is a growth area for larger operators, it is much less so for many small tourism businesses that make up the bulk of the industry.

The lack of e-tourism awareness and skills among local tourism businesses is confirmed by the results of a census undertaken by the National Tourist Board and Ministry of Tourism and Cultural Affairs in 2020.

A survey conducted for this Strategy reveals that most very small businesses (i.e. under ten employees) have limited knowledge of ICT and do not use it to its full potential. The survey also suggests that the main barriers preventing micro-businesses from using ICT are cost, lack of knowledge, lack of time and a belief that the existing business methods are satisfactory. In addition, there are other barriers to the successful adoption of e-tourism approaches, including:

- the lack of a viable e-business environment – no integrated network within which smaller tourism providers can work cost-effectively and efficiently with existing web-based systems
- a variety of tourism data formats that work to limit 'interoperability' (i.e. systems working well together) – instead, several different methods that are not connected are used by destinations, hotel groups or tourism operators
- a lack of integration of tourism data and

e-commerce tools – there is so much tourism information that is as yet unconnected to effective real-time booking and transactions capability

- a variety of models for holding inventory (e.g. bed spaces to sell) and bookings have been adopted by destinations and commercial operators, with limited ability for these to work together seamlessly
- the cost for businesses in adopting individual solutions – with no guarantee that these solutions will meet consumer needs or reach appropriate markets
- limits on telecommunications bandwidth in many parts of the country, constraining the quality of online services – a problem that is unlikely to be fully resolved soon
- low level of solid ICT knowledge, lack of adequate ICT infrastructure and the e-system operation, high cost of e-tourism operation in the ministry and weak inter MDAs e-systems

To succeed, then, the Strategy must offer solutions that overcome these barriers and enable easier access both for visitor information and business-to-business communication.

Ultimately, such a system must deliver the capability for booking online, advertising, data gathering and other e-commerce benefits. The SLNet project aims to create an online tourism network that directly addresses or helps to resolve many of these problems

This Strategy and the SLNet project are both ambitious, and it is reasonable to question how it can be achieved. The answer is by adopting a step-by-step approach, with the focus on:

- establishing the ICT and database infrastructure to provide a platform on which different players can organize their activity, with assistance from SLNet
- encouraging participation by destinations, by enabling them to connect easily to the SLNet infrastructure for data exchange purposes – and then to use the SLNet services as much (or as little) as they choose, concerning their existing systems.

3. STAKEHOLDER AND CUSTOMER NEEDS

a. Potential Stakeholders and Customers

There are various business models currently in operation for e-Tourism. All of these models define how stakeholders in the tourism sector interact and how customers are served. First, there is business-to-business, which seeks to determine how businesses do business with each other. Second, there is the business to consumer, which defines how the company serves customers with valuable products and services in exchange for revenue. Finally, there is also business-to-business-to-consumer operated by entities that benefit both businesses and customers. However, the model most commonly adopted by developing countries just started with e-tourism is Government-to-business (G2B), where governments support companies to build services and raise the profile of the local tourism experience for the average tourist/traveller. Also, there is a growing need for Administration to Administration (A2A) link in the sector supported by the e-Tourism system. This Strategy anticipates the G2C model and has the following customers identified:

- Consumers of tourism services, i.e. Local travellers, International travellers
- Travel trade
- Travel media
- Event guests for such high-profile local events like Ecofest, musical concerts, religious programs, and those are coming for sports and games tourism.
- Researchers, educationists, ancestry, heritage tracers (root tourism)
- The identified stakeholders are:
- Tourism businesses in the hospitality, travel and tour guiding sectors
- Regional Travel Boards and local destination management organizations (DMOs)
- Suppliers of destination management systems
- Suppliers of goods and services to tourism businesses, e.g. food, laundry, furnishings, etc.
- Suppliers of e-commerce services, e.g. e-payment services, technology development, etc.

- The media, civil society, tourism development communities, MDAs

b. User Requirements Users of e-tourism services have two basic needs:

1. for information and
2. for an effective process for conducting business related to travel and tourism as well as research

i. Consumers

Consumers and travellers visiting destination websites are looking primarily for in-depth, up-to-date information on potential destinations, activities and accommodation. Details about direction, including simulations of trips, an indication of costs and transportation availability, can prove extremely useful to the average tourist. Therefore, the facilities to create travel itineraries, receive 'instant' offers, compare prices, and confirm bookings and share experiences will become increasingly important.

Thus, the critical requirements for consumers are:

- Fast, low cost, direct access to accurate information, with facilities for sophisticated search and immediate, secure booking at competitive prices
- Transparent product pricing, e.g. per room, per traveller, supplements, final expense, etc.
- Tourism product quality assurance from recognized standards bodies
- Access to alternatives to direct booking such as:
 - call centre support for completion of the booking
 - online travel agencies/resellers for completion of booking
- Enhanced visitor services for travellers to and within the destination through electronic access to comprehensive information and reservation services from Mobile App, websites or TVs in hotel bedrooms, Internet cafés, kiosks, smartphones, tablets, etc.
- People are using these services in the



Sunset at Lumely Beach

destination. Therefore, they will seek additional types of information, for example, local transport, entertainment, events, restaurants, bars; information that may be available through DMS or third-party commercial suppliers.

ii. *Travel Trade*

Potential requirements of the travel trade (tour operators, travel agencies, tour guiding agents, etc.) include:

- efficient search for accommodation, attractions and other facilities – often with a focus on group travel
- ability to negotiate allocations and release dates, prices, commissions/net prices, and other sales terms
- mechanisms to contract quickly and cost-effectively
- quality assurance from recognized bodies for regulating standards
- access to local guiding agents
- opportunities for the formation of local/regional product consolidation and distribution
- opportunities for domestic promotion to consumers
- easy access to relevant still and moving image material for use in promotions

iii. *Travel Media*

The travel media's prime requirement is for:

- Information on latest product developments
- Information on quality assured product
- Well-researched material which can be used for features
- More accessible contact with experts on a wide range of subjects
- Easy access to relevant still or moving image material.

iv. *Event Guests*

There is a growing potential for international events such as those recently hosted in Sierra Leone to attract international guests. Given that a relatively large proportion of both guests and participants are likely to use technology via either social media or web search on a day-to-day basis, the potential for e-tourism is considerable. The event organizers or intermediary will generally be seeking:

- efficient search and selection of appropriate destinations and venues – often against a very detailed set of requirements – the information for which may best be accommodated in supplementary databases
- Mechanisms to contract quickly and cost-effectively
- Promotional material to assist in the e-marketing of their events.

v. *Tourism Businesses*

The core requirements of businesses are relatively simple – more business, higher yield, lower costs and increased profits. Behind these high-level objectives are specific needs, including extended marketing and increased operational efficiencies. While companies should be active in their own right, they will also attract new business by working with or through the National Tourist Board.

Tourism businesses will be marketing-focused and will seek:

- Cost-effective access to powerful distribution mechanisms. Tourism businesses need distribution mechanisms, which are appropriate for their products. Distribution services should:
- Enable control of distribution channels
- Enable online control of prices and availability
- Enable control of automatic confirmation or confirmation after intervention by reception staff
- Secure and cheap payment/clearing mechanisms
- Precise and up-to-date back-office services
- Be supported by call centre services
- Support from NTB for linking up with other complementary local products, destination marketing and fulfilment (e.g. brochure distribution, booking services).

vi. *Tourist Information Centers*

Tourist Information Centers (TICs) (and destination-based call centres) deal primarily with public enquiries. They are generally dependent upon local funding to support their services. TICs have specific requirements:

- to quickly search in-depth, up-to-date, accurate information (including special offers) on available accommodation, activities, events and many other topics – and create

- schedules and map-based itineraries
- to make immediate bookings, based on the accurate price information
- To open new revenue opportunities via integration of call centre facilities with online booking mechanisms
- To be integrated into a national TIC network to obtain bookings from national and international customers.

Whilst demand may be mainly for local information. Therefore, we propose having a Tourist Information Center that will address the need to handle local and international enquiries about other parts of their area or elsewhere in Sierra Leone – and therefore to have access to the national database and to be able to communicate quickly with tourists who reach out through the call centre set up to support this service.

vii. *Destination Management Systems Suppliers*

Destination management systems are specialized software applications that provide the foundation for managing destinations, enabling tourism product information to support marketing and visitor services and providing up-to-date data allowing online booking. DMS Software can significantly help the National Tourist Board

market Sierra Leonean Tourism with the tourist. However, the suppliers of DMS software require a market that encourages investment in technical improvement and adoption by DMOs not yet covered. Creating a national SLNet infrastructure with open interoperability standards would enable DMS suppliers to adopt these standards to offer DMOs the added confidence of nationwide distribution and the other competitive features of their systems.

viii. *Suppliers of Goods and Services*

The suppliers of goods and services to tourism businesses are faced with the costs and inefficiencies of dealing with a highly dispersed and diverse range of relatively small customers. If tourism businesses had online access to supplier catalogues for product search and price/delivery comparisons and ordering, the suppliers and procurement companies would have broader and cheaper distribution. They may also be able to plan and provide more affordable logistics.

Enabling such a procurement service could be built into the SLNet national infrastructure.

ix. *Suppliers of e-Commerce Services*



Aberdeen bridge

The take-up of e-commerce services by tourism organizations has been hindered by the lack of data and systems that work together. This has held back the development of e-tourism services, which need a set of national standards to be fully effective. The consequence is those cost economies and the breadth of supply of e-commerce services have not yet been achieved. National standards, driven by the requirements of SLNet, will hasten the creation and use of payment and back-office services.

x. *Commercial Operators not involved in Tourism*

This category is made up of organizations and companies that are not primarily involved in tourism but would benefit from access to tourism data, for example:

- Distribution organizations could publish their product data through their distribution routes, for example, Internet service providers or mobile phone companies.
- Content providers could provide appropriate content to enhance the central system, for example, a bus hiring company.
- Data merchants - those who would pay for the use of the database content for their commercial purposes, such as media production companies.
- Travel goods suppliers, for example, hotel furnishings suppliers, local cosmetics manufacturers for hotels.

Over the past decade, there has been a considerable investment made by the Government of Sierra Leone to enhance the



Aerial view of Tokeh Sands



Mountain Cut road

4. STRATEGIC INTERVENTION OPTIONS

information technology landscape. Investments such as the landing of the fibre optic cable and liberalization of the market for internet service operations have helped increase access and reach for the emergence of e-commerce and related services. In addition, the enhanced capacity in energy generation has all the more enabled service delivery and industrial growth across the country.

These developments have also seen investments in systems to collect, monitor and manage data at the national level. However, in determining the most appropriate Strategy for e-tourism in Sierra Leone, it is essential to recognize that this does not start from a 'blank sheet' - the critical requirement would therefore appear to be creating a framework that can build upon what has gone before.

This Strategy addresses how best to deliver an integrated or joined-up structure that will enable consumers and tourism providers to benefit at national and international levels. Therefore, a key strategic objective is to allow comprehensive searching, planning, reservations, bookings and payments for tourism products to occur via the Internet and other communications channels such as Tourist Information Centers, call centres, mobile devices, social media and other interactive services.

The core of any such structure will be some form of the destination management system (DMS) – a combination of data management software, search engine, booking and transactions facilities, all operating within a viable business model. There are three options for the development of a national e-tourism strategy for Sierra Leone:

- a) A 'minimum intervention approach that relies upon the continuing development of a diverse range of local and national systems and commercial online reservation services
- b) The development of a complete integrated national destination management system
- c) The development of a federal model, with a national network infrastructure and services designed to work with existing and emerging systems.

The relative merits of these approaches are considered briefly in the following sections.

a. *A Minimum Intervention Approach*

This option would rely upon the continuing development of local DMS solutions and commercial reservation systems. There needs to be a database to be developed as a source of product information. DMS software suppliers would be encouraged to adopt standard data definitions that would facilitate data exchange. However, extensive data collection would still be required, and there would be the only limited capability for searching on product availability across Sierra Leone.

· *Benefits*

The investment would be required to develop a national web portal linking regions and destinations. This could include a search engine to enable consumers to find products held in different locations. In addition, an NTB's website that does not yet have local e-commerce enabled system would need to consider this, hoping that this would fully integrate with national distribution.

· *Limitations*

Adopting this approach seems unlikely to achieve the e-tourism Strategy, enabling public access to comprehensive tourism content or helping small tourism enterprises adapt to an e-business environment.

b. *A National Destination Management System (DMS)*

This option would seek to build or acquire a comprehensive national system comprising data management software, search engine, booking and transactions facilities. This would extend beyond the product information database currently found at www.ntb.gov.sl into hosting a complete product availability (inventory) database and associated software to manage this

highly volatile information.

- *Benefits*

Technically, this would be the simplest solution and could potentially be developed in partnership with a commercial operator, helping to spread the costs and risks.

- *Limitations*

However, the main drawback would be that locations with existing destination management solutions would not integrate directly into the national DMS and potentially lose business. This is likely to deter the participation of destinations with well-established local systems, including most seaside resorts and major cities, and result in duplication – although no such local system has been found. It would also add inconvenience for tourism providers, who would need to work with national systems. Such non-participation in the scheme seems likely to render this option unattractive to the main stakeholders, with consequential reduction of the value to consumers. This would thus fall considerably short of a fully integrated Sierra Leonean tourism industry.

- c. *A Federal Network Approach*

The federal approach combines the advantages of each of the first two options. First, it would deliver the infrastructure that would enable tourism product information to be shared via a national interoperability standard and a communications backbone. This would allow a national level of content integration and search capability to enable easy access to tourism product information at national, regional and local levels, including access to booking and payment services.

Much of the information would be maintained locally and exchanged via the communications backbone. DMS suppliers would be encouraged to define the interoperability standard, enabling them to offer DMOs integration with the national

framework. DMOs not yet using such systems would find it easier to do so.

This hybrid option seems more likely to attract the most significant uptake of destinations and tourism providers, bring most integration and access to the most comprehensive sources of product information for the consumer, and maximize the project's success. In addition, this should lead to an overall reduction in duplication of data collection and greater participation by tourism providers, leading to more cost-effective operation. As such, this option would appear to offer the best prospects for contributing towards the sustainability of local tourism services, most of which are dependent upon local authority support.

This is, therefore, the recommended strategic approach – one that was widely supported in the research process – and forms the basis for the proposed SLNET Online Tourism Network.

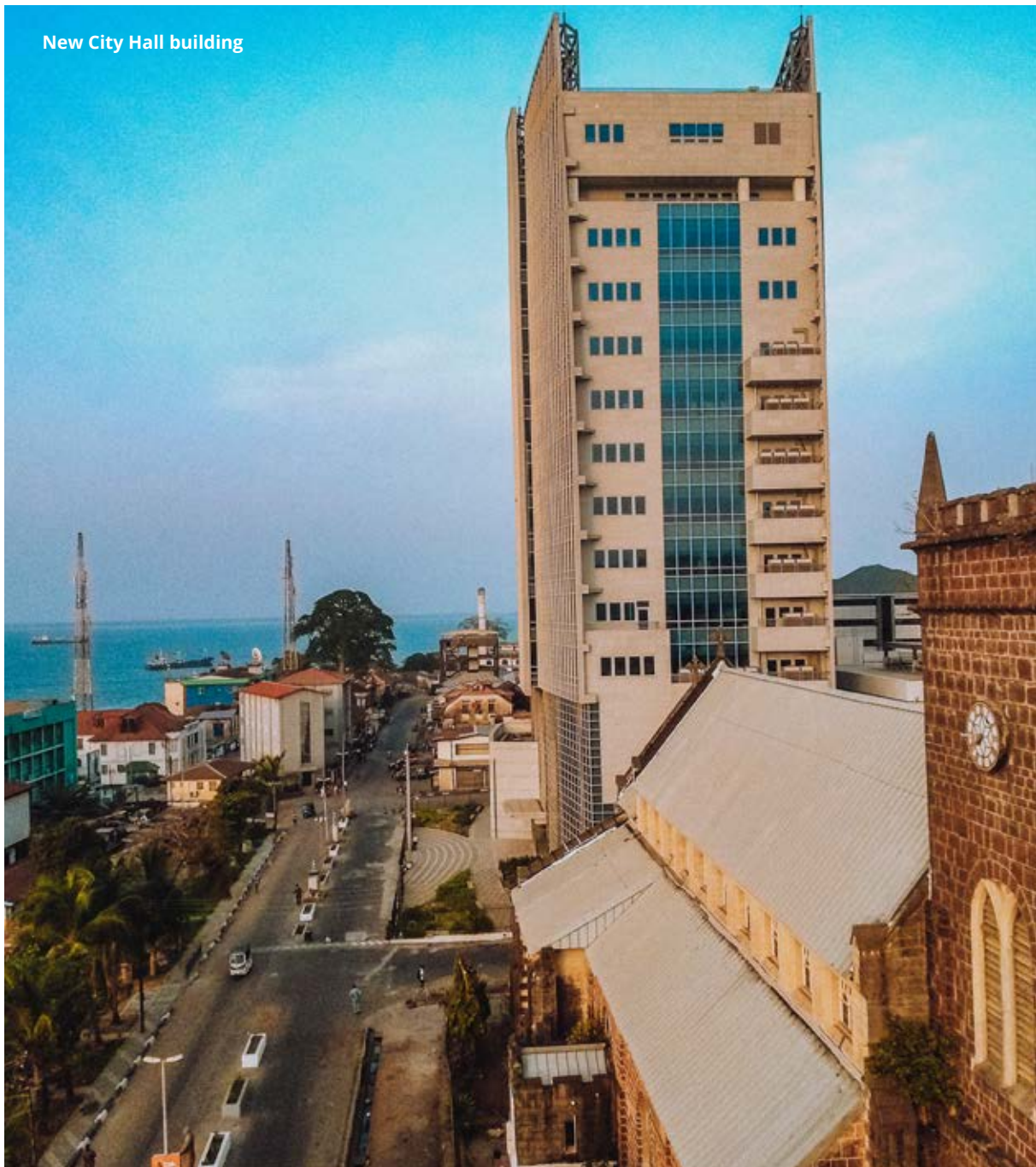
SLNet is to be developed by the National Tourist Board and the Ministry of Tourism as the vehicle to implement this Strategy through a developer of Destination Management Systems with a national database and web interoperability. It will be an industry-wide network offering a range of electronic business and marketing services to the industry and designed from the outset to work with existing destination management systems at the regional and local level. The implementation of this project must be mutually beneficial to all concerned, leading to more robust, more effective working relationships across the whole sphere of tourism development.

Tourism Service providers and destinations can open accounts on the network, like they do on Facebook, and update their data. Their account's viability can largely depend on the effectiveness of the subscription payments and the validity of licenses regulated and issued by the Ministry of Tourism and National Tourist Board. There would be opportunities to utilize APIs that can provide additional benefits to the destinations and service providers.

In adopting this Strategy, SLNet will be realistic about all DMOs and DMSs to deliver the necessary input, whether in quality or quantity. Inevitably, there will be situations where DMOs do not have the resources or, in some cases, the

motivation to deliver the input required within the federal approach. Recognizing this, NTB will have an essential role in ensuring the local information and operating backup mechanisms to deal with any deficiencies or gaps in data provision.

New City Hall building





Fishermen fishing at Lumey Beach

5. SLNET IN SUPPORT OF E-TOURISM DEVELOPMENT

Significant work has already been undertaken in the development of some local destination management systems within www.ntb.gov.sl. There is, therefore, much information and expertise already available at both the Ministry of Tourism and the National Tourist Board.

However, there is also a natural reluctance to re-invest and to change business practices. Therefore, if new systems are to be introduced successfully, the existing players must be involved in the process, invited to contribute expertise and offer solutions, which fit existing frameworks.

Whilst there will be opportunities for commercially sustainable e-commerce developments once SLNet is in place, a substantial part of the e-tourism agenda has wider, strategic objectives - i.e., enhancing industry performance through the provision of widely accessible services that do not directly generate income. There is, therefore, a strong case for public funding to support the essential core elements of the system.

The SLNet project will be the cornerstone for delivering the Strategy's aims, providing the central operating framework and the focus for coordinated action at the regional and local level. This needs to be complemented by efforts to raise awareness and skills amongst tourism providers, especially the smaller businesses, to take full advantage of electronic marketing and e-commerce.

• a. SLNet

The fundamental aim of SLNet is to enable one-stop-shopping for all Sierra Leone's tourism products. To achieve this, the project will pursue the following key objectives:

- Create a national interoperability standard and infrastructure for Sierra Leone to connect existing regional and local tourism information systems.

- Provide a secure and effective communication network for NTB, MTCA and players in the sector
- Ensure that all destinations can adopt viable DMS services
- Deliver high-quality data to meet the service requirements of the organizations concerned with tourism at the national and local level
- Offer an end-to-end booking service to end consumers.

The products of SLNet are therefore of three types:

Community Building Services: These will enable NTB and other players to promote the development of travellers, traders, suppliers, providers via forums within the network, which will encourage greater use of the other services offered by NTB, DMOs, TICs, etc.

Content Management System (CMS) services: This will enable NTB to acquire, edit and publish tourism information for marketing. Data for the CMS will be obtained via web forms and online connections to DMSs operated by other partners. The CMS will also be used to support the community services.

E-commerce Services: This will enable end-consumers to access the whole SME tourism product of Sierra Leone, search, book, and pay for it through a single web or mobile application. This will require SLNet infrastructure to interoperate with the DMSs operated by NTB and other databases. Interoperability must therefore be developed for:

- DMSs and other content systems (also needed for the CMS service)
- Third-party e-commerce providers, such as e-payment service providers
- Customer relationship management software must also be integrated.
- In addition, a model for a national virtual call centre to be immediately developed to address booking queries and guiding

information. The objective of the call centre is to support the online booking services.

In general, SLNet will provide:

- Quality of Data management guidelines
- model commercial contracts (e.g. between providers and DMS operators)
- Quality of Service (SLA) guidelines for DMS operators
- Customer relationship management guidelines
- Security guidelines
- The SLNet model envisages that customer bookings will require routing of the availability queries and booking requests to the regional/local DMSs.
- SLNet will also offer to host solutions remotely, such as DMSs, financial

management software, membership management or customer relationship management applications to reduce maintenance costs.

- Achieving these outputs is expected to result in a range of tangible benefits:
- Increased number of bookings and spread of bookings of tourism product in Sierra Leone
- Increased value of the product sold by enabling the packaging of product by the end customer
- Reduced net costs of marketing and distribution for small tourism businesses
- Improved cost-effectiveness of marketing
- Increased revenue to help sustain services
- Improved community access to tourism information

Improved economic competitiveness and



Token Beach

6. IMPLEMENTATION PLAN AND POLICY

assistance in delivering government objectives. A five-point plan for action is proposed as a framework within which Sierra Leone's tourism businesses and organizations can realize the opportunities offered by e-commerce and digital technology.

a. Utilizing e-Marketing Potentials

The advent of the Internet, mobile technology, and digital interactivity significantly impact the way tourism products are marketed and sold. The web can be a cost-effective medium for publishing information and providing a transactional capability for customers as part of a destination marketing strategy. Email conveys information directly, cheaply and at short notice to prime prospects. Electronic marketing enables organizations to engage with customers on a one-to-one basis and can promote 'one-to-many' activities, whereby large numbers of potential visitors can be attracted to a destination or company's website.

However, 'E-marketing' should be undertaken in harmony with traditional 'offline' marketing activities as part of an e-business strategy more closely integrating the promotional, sales and fulfilment roles of websites, brochures, and

telephone support services. Campaign strategies will need to position the role of printed media alongside electronic marketing to maximize returns on investment.

One strategic priority for Sierra Leone at the national level is to ensure that good quality content is routed through www.ntb.gov.sl and the [VisitSierraLeone](#) family of websites to reach overseas markets and redevelop a TravelSierraLeone web portal as a platform for domestic marketing campaigns. Attention should also be given to linking the latter to proactive e-marketing campaigns using customer databases, personalization and marketing partnerships.

To realize the potential of electronic marketing, access to online bookings and transactions facilities will need to become more widely available across the industry. There may be opportunities at the national level to link to specific web-based reservations systems operated by commercial groups, which should be explored. However, a priority for SLNet should be to enable searching and booking based on up-to-date inventory held on local Destination Management Systems where these exist and to support the extension of these services to other areas.

Key Activities	Lead Role	Time
Develop the TravelSierraLeone website as a national web portal to support a range of SL marketing campaigns	SLNet	Mid to Late 2021
Launch complete e-commerce services on		
TravelSierraLeone	SLNet	December 2021
Ensure that improved Sierra Leone tourism information is available for distribution to overseas markets via the website and other channels	NTB	Mid to late 2021
Support the extension of Destination Management System services to areas not yet effectively covered	SLNet	Mid to late 2021

Implement Customer Relationship		
Management and Marketing an integral and vital aspect of destination marketing. This will require developing an accurate, well-researched customer database, compiled at different points of customer contact, and the tools to exploit them.	SLNet	2022
Develop a sustainable business model for		
online bookings via SLNet	SLNet	2022
Establish the foundations for future marketing partnerships with key private sector players	SLNet	2024

b. Supporting Businesses and Suppliers to Enhance Capacity to Compete Internationally

- research and intelligence information
- Communicate and do business more efficiently with each other.

The Internet provides an opportunity to create an online network such as an extranet that will enable stakeholders to communicate easily while also providing a wide range of other functions. Such a network could help raise the competitive performance of tourism businesses by improving day-to-day communication between the national tourism marketing organization (NTB) and businesses, and more specifically, by enabling tourism providers to:

- Access tourism information (e.g. on events) for guests
- use online tools such as property management/booking systems, e-procurement services, enabling, for example, accommodation providers to maintain their availability on common databases to allow online bookings
- Access business support services – such as

The technical requirements for a fundamental industry extranet are relatively straightforward. However, the operational aspects of implementing it are costly. Therefore, if the system is to be cost-effective, it will need to support a critical mass of suppliers.

This same network, with some modifications, may be used for the involvement of the wider community to create awareness of the importance of tourism and an understanding of the industry. It could also provide a mechanism for consultation on future tourism strategies. Similarly, the extranet could provide the means for provincial and local government departments and other public agencies to access the knowledge base to help estimate the economic impact and guide specific policy decisions.

Key Activities	Lead Role	Time
Develop an interactive business-facing web portal to provide convenient access to web forms, business advice and intelligence.	NTB/SLNet	2021
Promote the integration of tourism content within local information systems and support business-to-business development initiatives.	NTB/SLNet/Tourism Providers	2021
Promote the integration of tourism content with other tourism-related content at the national level	NTB/SLNet/Tourism Providers	2022
Develop other online tourism services	NTB/SLNet	2022-23
Develop new online tools for use by tourism providers	NTB/SLNet	2022-23

c. *Developing Standards for Comprehensive Tourism Information*

Accurate, up-to-date information is central to all aspects of tourism management – including marketing, product development and research. A fundamental principle for information collection that underlies this Strategy is to ‘collect once and distribute freely through a range of channels and media, to meet consumers’ needs. The aim should be to enable product data to be collected electronically.

However, to be genuinely efficient, it is vital that any existing duplication of effort is eliminated and those common standards for data collection and storage are defined. The priority is to agree on a definition for nationwide standards of tourism data types and structures that can:

- provide a framework for local tourism data

collection and distribution

- be effectively distributed and used by a variety of organizations
- Be integrated into a national tourism product database.

In the longer term, as standards for data exchange (or interoperability) evolve, the industry will move away from traditional structured databases. Instead, it will become possible to search data held in different formats and consistently present the results.

The tourism census report contains valuable data about product availability that can translate into a database for services and capacity across the industry. In addition, standards will be developed for product improvement across service providers in the database. However, this is only a first step towards achieving the kind of interoperability required to support electronic searching and booking fully.

Key Activities	Lead Role	Time
Develop a full e-commerce interoperability standard for SL	NTB/SLNet	Mid 2021
Promote the SLNet interoperability standard to SL's tourism industry	NTB/SLNet '1111'	Mid to late 2021
Enable tourism product data to be collected and managed electronically	NTB/SLNet	Mid to late 2021

d. *Implementing the Strategy*

SLNet is the core vehicle for implementing this

Strategy. The anticipated delivery timetable for SLNet can be summarized as follows:

SLNet Milestones	Target Dates
Develop SLNet Business Model	Jan – June 2022
Complete the extranet service for tourist information centres and begin to train users	June 2022
Hold national 'kickoff' press conferences for the development of the SLNet e-tourism platform	July – Dec 2022
Conduct awareness training programmes for critical players in the sector, including small tourism businesses	July – Dec 2022
Develop and complete SLNet interoperability standards for all users	July – Dec 2022
Carry out integration with other services with the ministry of tourism, national tourist board and tourism service providers	July – Dec 2022
Public launch of e-commerce services for holiday-makers	2023
Public launch of e-commerce services for re-sellers (e.g. travel agents)	2023-24

A communications plan which identifies industry audiences that need to be made aware of SLNet, how they should be addressed, and when needs to be developed. This plan should cover industry organizations such as Hotel Owners Association, Restaurants and Night Club Association, Chamber of Commerce, Government departments and many others.

Communications to be planned include:

- Presentations to targeted audiences at local and international travel events
- A national 'kickoff' conference and workshops

for a wide range of contacts from July to September 2022

- A project information webpage, www.ntb.sl/slnet, should be launched, an introductory brochure published and distributed, and an electronic newsletter released.

A Tourism Technology Working Group as a consultative forum for SLNet should be immediately developed and strengthened to involve other organizations, which may assist in influencing ICT strategies and programmes relevant to tourism.

Aerial view of a cassava farm



7. MONITORING AND EVALUATION

To evaluate the impact of this Strategy requires indicators to be defined. These indicators should measure performance both in terms of providers

and of end-users. Several strands of research and monitoring will need to be undertaken to achieve this coverage, as indicated in the following table.

Objective	Key Result	Indicator
<ul style="list-style-type: none"> To enable the National Tourist Board to enhance its service delivery within the sector 	Improve capacity to deliver efficient service to vendors of the industry and in marketing tourism in Sierra Leone by 60%	Increased GDP contribution from the tourism sector
<ul style="list-style-type: none"> To mobilize effective organizational and technical responses to assist the industry, especially small tourism businesses, adapt to the new e-tourism environment 	Improve responsiveness for enquiries from industry players, small tourism businesses and partners	Feedback loop data. Achieving NPS of +7
<ul style="list-style-type: none"> To improve the collection and dissemination of comprehensive and appropriate tourism information to meet the needs of consumer growth markets 	Improve data collection and dissemination by 50% minimum	Data collection and circulation records
<ul style="list-style-type: none"> To improve business processes for marketing, booking and purchasing of tourism products 	Improved and newly developed processes for marketing, booking and purchasing of tourism products	Sales turnover records for booking and other tourism products
<ul style="list-style-type: none"> To adopt the most appropriate communications and technology solutions and management information systems at the National Tourist Board and the Ministry of Tourism to support efficient delivery of the above 	Development of e-commerce portals, database system and customer relationship management system (CRM)	E-commerce portals, database and CRM developed
<ul style="list-style-type: none"> To achieve a fully integrated e-tourism network for Sierra Leonean tourism. 	Integrate e-commerce platform across a network for free flow of business opportunities locally and internationally, information exchange and data management.	Integration completed.



Sunset at Aberdeen roundabout

8. DELIVERY BUDGET

SLNet Milestones	Activity	Target Dates	Delivery Cost
Develop SLNet Business Model	Hire consultant for development of business model design	Jan – June 2022	Le100,000,000
Complete the development of platform and extranet service for tourist information centers and begin to train users	Hire developers for development and maintenance of platform, including training staff and partners on use	June 2022	Le350,000,000
Hold national 'kickoff' press conferences for development of the SLNet e-tourism platform	Project launch press conference – venue and logistics	July – Dec 2022	Le50,000,000
Conduct awareness training programmes for key players in the sector, including small tourism businesses	Hire trainers; organize at least three sets of trainings	July – Dec 2022	Le150,000,000
Develop and complete SLNet interoperability standards for all users	Consultant for development of interoperability standards for interaction across computer systems and networks	July – Dec 2022	Le100,000,000
Carry out integration with other services with the ministry of tourism, national tourist board and tourism service providers	Developing networks and information systems across MTCA, NTB and tourism service providers	July – Dec 2022	Le200,000,000
Public launch of e-commerce services for holiday-makers	Launch event of the platform	2023	Le200,000,000
Public launch of e-commerce services for re-sellers (e.g., travel agents)	Roll out of business model	2023-24	Le250,000,000
TOTAL IMPLEMENTATION BUDGET			Le1,400,000,000

