Regional Competitive Benchmarking

# Creative Industries Analysis: Gambia vs West African Competitors

**Project:** Regional Benchmarking & Market Positioning Analysis  
**Component:** Creative Industries Competitive Analysis  
**Date:** October 2025  
**Data Period:** 2013-2025  
**Total Reviews Analyzed:** 1,316 (Gambia) + 3,096 (Regional) = 4,412 reviews

# Executive Summary

This analysis compares Gambian creative industries against 45 regional competitors across 5 West African countries (Benin, Cape Verde, Ghana, Nigeria, Senegal) to identify competitive gaps, best practices, and strategic opportunities for improvement.

## Key Findings

### Gambia's Competitive Position:

* Overall Sentiment: +0.19 (Creative Industries only)
* Regional Ranking: 4th of 6 countries
* Gap to Leaders: -0.09 sentiment points behind Benin (+0.28)
* Competitive with: Senegal (+0.20), Cape Verde (+0.18)
* Ahead of: Nigeria (+0.15)

### Critical Gaps:

* Infrastructure & Facilities: -0.19 points behind regional leaders
* Educational Value: -0.15 points behind best practices
* Value for Money: -0.12 points below regional average

### Competitive Advantages:

* Artistic & Creative Quality: +0.02 ahead of regional average
* Cultural Authenticity: 67% positive mentions (vs 58% regional average)

# 1. Country-by-Country Sentiment Comparison

## Table 1: Creative Industries Performance by Country

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Country** | **Stakeholders** | **Total Reviews** | **Avg Sentiment** | **Avg Rating** | **Top Performer** | **Gambia Gap** |
| Benin | 7 | 412 | +0.28 | 4.18/5 | Musée Fondation Zinsou (+0.32) | -0.09 (Gambia behind) |
| Ghana | 17 | 1,398 | +0.26 | 4.21/5 | Cape Coast Castle (+0.24) | -0.07 (Gambia behind) |
| Senegal | 12 | 891 | +0.20 | 4.15/5 | Gorée Island Museums (+0.29) | -0.01 (Gambia behind) |
| Gambia | 12 | 1,316 | +0.19 | 4.06/5 | Kachikally Crocodile Pool (+0.21) | — Baseline — |
| Cape Verde | 5 | 223 | +0.18 | 3.92/5 | Mindelo Cultural Centre (+0.26) | +0.01 (Gambia ahead) |
| Nigeria | 4 | 172 | +0.15 | 3.88/5 | Nike Art Gallery (+0.23) | +0.04 (Gambia ahead) |

## Key Insights

* Gambia ranks 4th of 6 countries — mid-tier performance
* Gap to leaders (Benin): -0.09 sentiment points (~32% improvement needed to match)
* Competitive with: Senegal, Cape Verde (within margin of error)
* Ahead of: Nigeria (emerging creative tourism market)

# 2. Theme-by-Theme Competitive Analysis

## Table 2: Thematic Performance — Gambia vs Regional Leaders

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Theme** | **Gambia Score** | **Regional Avg** | **Best Regional Performer** | **Gap** | **Learning Opportunity** |
| Cultural & Heritage Value | +0.22 | +0.24 | Benin (+0.29) Musée Fondation Zinsou | -0.07 | Heritage site presentation, exhibit design |
| Service & Staff Quality | +0.24 | +0.26 | Ghana (+0.31) Cape Coast guides | -0.07 | Tour guide certification, hospitality training |
| Facilities & Infrastructure | +0.09 | +0.28 | Benin (+0.36) Restored museums | -0.19 ⚠️ | Investment in building maintenance, signage |
| Accessibility & Transport | +0.21 | +0.26 | Senegal (+0.31) Gorée ferry system | -0.10 | Transport logistics, wayfinding, ferry reliability |
| Value for Money | +0.15 | +0.22 | Ghana (+0.27) Transparent pricing | -0.12 | Pricing communication, value perception |
| Safety & Security | +0.16 | +0.18 | Senegal (+0.24) Visible security | -0.08 | Security presence, safety communication |
| Educational & Informational Value | +0.19 | +0.28 | Benin (+0.34) Interpretive centers | -0.15 | Interpretive signage, audio guides, guided tours |
| Artistic & Creative Quality | +0.21 | +0.19 | Gambia (+0.21) Craft markets | +0.02 ✅ | Gambia is competitive — maintain quality |
| Atmosphere & Overall Experience | +0.23 | +0.27 | Senegal (+0.32) Immersive design | -0.09 | Atmospheric design, sensory experiences |

# 3. Best Practice Case Studies

## Case Study 1: Musée de la Fondation Zinsou (Benin) — Infrastructure Excellence

Sentiment Score: +0.32 (32% higher than Gambian museums avg)

### What They Do Well:

Facilities & Infrastructure: +0.36 (vs Gambia +0.09)

* Modern, climate-controlled gallery spaces
* Clean, accessible facilities with multilingual signage
* Regular maintenance and restoration programs

Educational Value: +0.34 (vs Gambia +0.19)

* Professional audio guides in 4 languages
* Trained docents available for all exhibits
* Interactive displays and contextual panels

"La Fondation Zinsou is a must-visit for anyone interested in contemporary African art and culture. The collection is beautifully curated, with stunning works by talented artists from Benin and across the continent. The exhibits are thought-provoking and offer a fresh perspective on African creativity and heritage." *— TripAdvisor Review, 5/5*

### Transferable Lessons for Gambia:

1. Investment in climate control and preservation extends building lifespan AND improves visitor experience
2. Multilingual interpretation (not just English) increases accessibility for Francophone and other African travelers
3. Staff training as museum educators (not just security) elevates Educational Value scores

# 4. Strategic Recommendations

## Priority 1: Infrastructure Investment (Gap: -0.19 points)

### Immediate Actions (0-6 months):

* Emergency repairs at Kunta Kinteh Island (structural preservation)
* Ferry service backup plan (private boat partnerships)
* Basic facility upgrades (toilets, signage) at top 5 visited sites

### Medium-term (6-18 months):

* Establish Heritage Conservation Fund (levy on tourism receipts)
* Partner with UNESCO for preservation technical assistance
* Implement regular maintenance schedules

Expected Impact: +0.12 sentiment boost, moving Gambia from 4th to 2nd in regional rankings

# Methodology Notes

## Sentiment Score Interpretation

* +0.50 to +1.00: Exceptional (rarely achieved; represents near-universal praise)
* +0.30 to +0.49: Very Positive (strong recommendation, high satisfaction)
* +0.20 to +0.29: Positive (generally satisfied, some areas for improvement)
* +0.10 to +0.19: Mixed Positive (satisfied but notable concerns)
* 0.00 to +0.09: Neutral/Low Positive (tepid satisfaction)
* -0.09 to -0.01: Neutral/Low Negative (dissatisfaction emerging)
* -0.10 to -0.29: Negative (significant problems, poor experience)
* -0.30 to -0.50: Very Negative (strong dissatisfaction)
* -0.51 to -1.00: Extremely Negative (rare; represents universal condemnation)

## Statistical Notes

* Minimum 24 reviews required for stakeholder inclusion (ensures statistical reliability)
* Margin of error: ±0.03 sentiment points at 95% confidence for stakeholders with 100+ reviews
* Theme mention minimum: 5 mentions required for theme-level analysis (prevents outlier skewing)

**Report Prepared By:** Regional Benchmarking & Market Positioning Analysis Team  
**Data Analysis Period:** October 2025  
**Review Period Covered:** 2013-2025 (primary focus 2019-2025)  
**Total Data Points:** 4,412 reviews, 57 stakeholders, 6 countries, 9 themes, 12,296 theme mentions analyzed  
  
*This report is Component 3 of Deliverable 2: Regional Benchmarking & Market Positioning Analysis. It provides the competitive context for the Creative Tourism Personas Framework and Digital Positioning Opportunities Matrix.*