Selling culture to package tourists

An exploration of demand for intangible cultural heritage excursions in The Gambia

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Executive summary

This study examines the scope for developing cultural excursions in The Gambia that would generate greater benefits for the informal sector. The approach is grounded in pro-poor tourism principles which aim to increase the flow of benefits to the poor. The report explores whether there is demand for these excursions, the characteristics of that demand and how best to access it.

The Gambia is a 'winter sun' destination and 84% of its arrivals are package tourists. The industry is concentrated in the hands of a few tour operators and hoteliers, in a 10 kilometre enclave, and market access for the informal sector is problematic.

Excursions in The Gambia currently provide only limited benefits for informal sector suppliers, and there is potential to increase this through the provision of intangible cultural heritage excursions based on local people's everyday lives: the one asset in which the informal sector has a competitive advantage. Previous surveys have found that tourists to The Gambia value this aspect of their holidays, and this report focuses on exploring latent demand in the existing package market rather than attracting a new niche market.

Demand is composed of a complex interaction of motivators and determinants, and although tourists in The Gambia are drawn by the winter sun, they are interested in other aspects of the destination. Cultural tourism in Africa tends to focus on contemporary life, and the growth of 'slum tourism' suggests that that this type of tourism now has mainstream appeal. Slum tourism is useful in illustrating how the everyday life of poorer residents of developing countries can be successfully sold as an excursion to Western tourists. Although slum tourism is controversial, closer examination shows that it is not inherently unethical, and it can generate benefits for poorer residents whilst fostering pride in their neighbourhoods and a more nuanced understanding by tourists.

Formal excursions in The Gambia are offered by licensed ground handlers, under contract to tour operators. Informal sector excursions are offered by local guides. Overall, the excursion range is limited and the two sectors are in fierce competition for market share, with many informal guides undercutting formal excursions by providing similar but cheaper and more intimate trips, which are however uninsured and unregulated.

Qualitative research methods were used to explore package tourist experience of excursions: it was found that many tourists disliked the large group sizes and commercial feel of formal excursions but were wary of using local guides instead. Although most tourists' primary goal is relaxation, a sizeable group also have a strong appetite to learn more about Gambians' everyday lives. This interest is partly fuelled by the impact on tourists of witnessing poverty first hand, an experience which arouses strong emotions in tourists, and which also stimulates concern about how the benefits of tourism are shared with local people and a desire to engage in charitable acts. The quality of interaction with local people generates tourists' best and worst holiday experiences: they treasure the friendliness and hospitality of Gambians but dislike the 'hassle' they are subjected to.

Excursions which promise an insight into Gambian everyday life, combining small groups, direct benefit to local Gambians and a positive interaction with local people would generate high customer satisfaction, and many tourists were enthusiastic about a proposed range of excursions which incorporated these features. The inclusion of an existing, successful excursion, Ida Chan's Home Cooking, provided a point of comparison, and the relative popularity of other proposed excursions strongly suggests that the excursions have broadly based appeal and would elicit substantial bookings.

However, tourists' primary goal is relaxation, and the intangibility of the product, the unfamiliar surroundings and previous bad experiences make tourists risk averse when considering whether to purchase excursions. The excursions would need to be packaged to overcome these barriers, emphasising functional value as well as epistemic value, and booking would need to be made easy for tourists.

Formal excursions are promoted by reps at 'Welcome meetings' and reps obtain commission on sales. This is the only significant distribution channel: hotels do not promote alternative excursions because the tour operators are their main customers. The informal sector is restricted to designated areas and struggles to gain access to tourists. However, as demonstrated by the example of Arch Tours, a local ground handler, it is possible to sell directly to tourists by maintaining a physical presence in the resort and maximising word of mouth recommendations. Likewise, although the formal sector excursion supply chain is stacked against local supplier interests, the case study of Ida Chan illustrates how a supplier can succeed by employing a focused and entrepreneurial approach.

There is demonstrable demand amongst package tourists in The Gambia for intangible cultural heritage excursions. Product development needs to encompass the full range of customer value, and packaging needs to overcome preconceptions whilst emphasising the benefits of authentic and fun experiences which benefit local people. Market access will always be challenging. The best strategy may be to develop a product to be distributed by a tour operator and to sell a range of complementary products direct to the tourist. This would guarantee access to the market whilst diversifying risk and generating more sustainable margins. Ultimately success will hinge on adopting a focused and entrepreneurial approach to developing high value excursions and securing market access.

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1. Introduction and rationale

Tourism can be a great force of good for a developing country, bringing in much needed foreign exchange and generating substantial revenue for direct providers and their suppliers, often in areas which are often otherwise economically marginal. It can bring improved infrastructure, enhance a country's profile and regenerate indigenous cultural practices. Alternatively, it can undermine local economies, further impoverish the poorest residents, degrade the environment and deplete valuable resources, demean local culture and reinforce tourist prejudices. At first glance, The Gambia seems to be an example of the latter possibility: a winter sun destination for the mid – low end package market; the industry appears to be in the hands of foreign tour operators and a few hoteliers and benefits few local Gambians, generating a cohort of 'bumsters' (beach boys). However, the reality is more complex. Some successful 'responsible' tourism initiatives have been developed and there are indicators that there is demand for forms of tourism which could benefit more Gambians: tourists place a high value on their hosts' friendliness and express interest in their culture. This report explores this interest with the intention of exploiting latent demand to generate wider benefits for the poorer Gambians.

'Responsible' tourism aims to create 'better places to visit and better places to live' by minimising negative impacts and maximising positive impacts of tourism. It adopts a 'triple bottom line' approach, encompassing economic, social and environmental factors. Of particular significance to this report are the goals of increasing the economic benefit to the local community, and fostering mutual respect between tourists and locals. Located within this broader framework, pro-poor tourism is a set of principles intended to maximise benefits to the poorer members of the host society. Pro-poor tourism recognises that economic benefit needs to be contextualised within the overall livelihood strategy of the poor and be evaluated in terms of net benefit to a household's ability to sustain itself. An increase in cash revenue to a household, for example, may be a negative change if it comes at the cost of depletion of other household resources or supplants a more sustainable source of living. Pro-poor tourism also places importance on the distribution of income amongst community members and their participation in decision.

1.1. Context

The Gambia is a small country in West Africa. Its borders follow the River Gambia inland from the coast and it is a long and thin country, bordered on all sides by Senegal. It has a population of just 1.7 million, about three quarters of whom make their living from subsistence agriculture (Mitchell and Faal 2006), and it is a poor country – ranked 151 of 169 in the UNDP Human Development Index rankings (UNDP 2010). Its major export crop, ground nuts, has been in decline for many years. Tourism, on the other hand, has grown to produce 16% of national income and accounts for an estimated 20% of private sector employment (Mitchell & Faal, 2006, p. 9).

Sold predominately as a mid to low-end winter sun destination to European markets, The Gambia offers guaranteed sunshine at affordable prices in a convenient 6 hour flight from the UK. It also offers an accessible taste of sub-Saharan Africa, where English is the official language, and hotels, restaurants and staff are familiar with the requirements of mainstream tourists. Frequently dubbed The Smiling Coast, The Gambia impresses tourists with its friendly welcome. 46% of tourists are repeat visitors (Bah & Goodwin, 2003, p. 17). The Gambia is also endowed with a richly diverse mix of ten different ethnic groups. However, the primary motivation for the overwhelming majority of tourists is soaking up some winter sun at the beach or hotel pool.

The tourism industry in The Gambia is heavily concentrated: 84% of all tourists come on a package (DOSTC, 2004b, p. 20). Over 90% of this market is handled by seven tour operators. Focused within a 10 kilometre coastal strip, 90% of accommodation is provided by 20 large hotels (Mitchell & Faal, 2006, p. 6). Hotel transfers and excursions are provided by four licensed operators, who operate under exclusive contracts with the tour operators.

The nature of the tourism industry in The Gambia presents some particular challenges for responsible tourism in general and for pro-poor tourism in particular. It is very vulnerable to tour operator actions. The winter sun market is very competitive and price sensitive, with new destinations always emerging. International operators may drop flights or pull out of the destination altogether if they consider it unprofitable: First Choice withdrew in 2009 with a resultant loss of some 59 flights and 12,000 seats.

The strikingly concentrated nature of the industry, both geographically and in terms of ownership, severely restricts access to tourists, especially for the informal market, which has few opportunities to sell to the tourists. Confined to the outer limits of the hotel beach, or restricted to designated spots, craft sellers and tour guides vie for the attention of passing tourists, often driving them away in the process. 'Bumsters', local young men who make a living from befriending tourists and selling their services, are both ubiquitous and problematic.

Given these challenges The Gambia might not appear fertile ground for developing a responsible, pro-poor tourism. And yet the opportunities are there. Surveys repeatedly find that tourists particularly value the friendliness of Gambian people, suggesting that their interest extends beyond just sun and sea. Tourists in The Gambia are relatively generous in their discretionary spending and a significant proportion of this discretionary spend does end up in the 'informal'[1] economy (Mitchell and Faal 2007). Tour Operators have expressed interest in diversifying their excursion offer and increasing benefits to locals. Local participation has been enhanced by the development of The Association of Small Scale Enterprises in Tourism (ASSET) which has increased the ability of local Gambians such as the juice sellers to benefit from tourism. And one of the weaknesses of the industry, that the tour operators all offer an almost identical limited and unchanging range of excursions, is also a great opportunity.

This report explores whether it is possible create a better holiday experience for tourists and a more responsible, pro-poor tourism for The Gambia by developing new excursions which benefit Gambians who are currently excluded from tourism and which offer tourists opportunities to experience more of the valued Gambian warmth. The rationale for choosing cultural heritage excursions and for targeting the mass market is expanded on below.

[1] Informal economy is used in this report to mean providers who are not members of the Gambian Hotel Association or the Ground Handlers Equipment Hirers Association

1.2. Rationale

1.2.1. Why the mass market?

86% of tourists in the Gambia say their primary motivation for coming was sun, sand and sea (Bah & Goodwin, 2003, p. 17). It is easy to conclude from this that they will have little interest in other activities. The Gambian Tourism Master Plan states: "tourists who come .... specifically do so to relax and do very little. For developments up-country, and based on the distinct culture and heritage of The Gambia, new market segments have to be developed". (DSTC, Republic of The Gambia, 2006, p. 46). It might seem easier to attract new tourists with different interests than to lure sun seekers away from the beach.

However there are compelling reasons to market to the existing package tourists rather than to a niche segment. The winter sun package market comprises the vast majority of tourists to the Gambia, and selling excursions to even just a small proportion of this core market will generate more income for poorer Gambians than selling comprehensively to a small niche market. From a broader responsible tourism standpoint it is important to make this core industry more equitable, rather than just focusing on more marginal niches. From a business perspective too, it makes more sense to develop new products for the existing market than new products for a new market.[2] The package market offers the greatest potential for impact and there are grounds for optimism that it would be receptive: the element that most pleases tourists about The Gambia is 'People and daily life' (57%) , ranked higher even than climate (55%). The 'friendliness of the people' is also the primary reason why people would recomend The Gambia to friends. (DOSTC, 2004b, p. 38). Creating a fuller understanding of tourists' appreciation of Gambian people, and how it might translate into demand for excursions are key foci of this research.

1.2.2. Why excursions?

Discretionary spend by tourists in The Gambia generates the most opportunities for increasing pro-poor impacts as it is the section of the value chain with the most local linkages (Mitchell and Faal 2007). Other elements of the package are controlled by tour operators and hoteliers and the scope for increasing local benefit is limited: the solutions need to be developed at destination level and require the participation of major stakeholders such the Government and the tour operators.

Discretionary spending on shopping has positive pro-poor impacts with half the spend going to the informal market. However, Mitchell and Vaal (2007) conclude that it unlikely that this can be increased and that the focus should be on defending this share by improving the customer experience.

Excursions generate some £4.5 million a year in The Gambia and Mitchell and Vaal estimate that 25% of this goes to the informal sector, a proportion which they suggest can be increased (Mitchell & Faal, 2007, p. 15). Excursions lend themselves to pro-poor tourism in a number of ways. They take tourists out of their enclave to areas not otherwise benefiting from tourism. They can incorporate a broad range of opportunities for income generation such as guiding, provision of refreshments and entrance fees. Tourists go to where the suppliers of the experience are, so suppliers do not have to uproot themselves or forfeit other income generating activities to participate. Excursions can therefore provide an additional income rather than supplanting other, possibly more reliable, livelihood strategies. Additional income such as this can make a huge difference to quality of life for poorer members of the community, providing the means for paying for school fees or medicine

[2] Ansoff Product / Market matrix

If demand allows, excursions could be rotated between different suppliers to disburse benefits more widely and ensure that the income remains additional and the tourist experience fresh.

1.2.3. Why cultural heritage?

There are several options for developing new excursions. There is, for example, an established birding market. However this market appears to be functioning well for the informal sector, with local people guiding most of the trips, and barriers to market access circumvented by the very effective word of mouth recommendation which operates in special interest groups. Goodwin (2002) recommends developing nature based excursions such as fishing trips. However the cost of securing and running a boat, and the health and safety requirements, present substantial challenges.

Cultural heritage utilises the one tourism asset where the informal sector has a competitive advantage: local people's culture and everyday lives. Local people can obviously offer a much more authentic experience based on their own intangible heritage than the formal sector can, and, if developed responsibly and respectfully, this asset will not deteriorate or deplete. Previous research has suggested that tourists enjoy interaction with Gambian people, and yet there are few excursions which even attempt to offer this. Furthermore, given the fierce competition between excursion suppliers in The Gambia, an issue explored in the next section, it is important to offer a complimentary product rather than one which increases competition in an already overcrowded arena.

Whilst exit surveys found that tourists value Gambian friendliness, hassle from bumsters was most frequently cited (68%) as the least enjoyable aspect of their holiday and the primary reason why tourists do not return. (DOSTC 2004b, 46). Bah and Goodwin (2003, p24) found that 50% of tourists finding bumsters intimidating Too many tourists leave The Gambia with a negative stereotype of Gambians and this matters partly because this means fewer repeat visitors and word of mouth recommendations, and also because a responsible tourism should foster greater respect and mutual understanding between tourists and their hosts. Excursions which focus on the intangible cultural heritage of local Gambians and which create an environment that encourages mutual understanding and respect would go some way to counter the negative image generated by bumsters.

1.2.4. Market focus

If cultural heritage excursions are to be successful in generating pro-poor benefits and fostering mutual respect and understanding there are a number of complex supply issues which need to be got right. Issues such as community consent and cohesion and the equitable distribution of income within the community, problems with lack of reliability and consistency of quality of supply, and supplier understanding of tourists' needs and motivations all need to be tackled if the excursions are to meet their goals. This report does not explore these supply issues: their breadth and complexity require investigation in their own right. Challenges relating to supply are best met from a clear understanding of market demand, and by, or in consultation with, established experts in this area such as ASSET. For a pro-poor intervention to be sustainable it must have a strong commercial grounding and be rooted in evidence of demand. Too many initiatives have been developed from the supply side, only to fail when they find no market for their products (Richards, 2000). Unless the excursions are established on commercial lines they will peter out or come to an abrupt end when their industry champion moves on or funding dries up. For these reasons, this report focuses on demand rather than supply .

This report also explores distribution channels. Their inclusion does raise additional problems for research methodology and detracts from the focus of the report. However, market access is such a crucial issue in The Gambia that any research which examines demand without also exploring how to access that demand would be of limited value.

1.3. Aims and objectives

Aim:

To explore whether and how pro-poor cultural excursions could be sold to the mass market in The Gambia

The research will explore the nature of demand for cultural products, factors influencing purchasing decisions, and the most viable channel for accessing this demand.

Objectives:

- Explore tourist motivations
- Assess tourist satisfaction with the current excursion offers
- Identify unsatisfied demand
- Assess tourist response to a set of proposed excursions
- Analyse the different channels in terms of scope for product innovation, access to market and sustainable returns

2. Literature review

2.1. Demand

This section starts by highlighting elements of tourism consumer theory most useful in analysing the excursion demand and purchasing behaviour. Demand for cultural tourism in Africa is explored, using 'slum' tourism to draw out key themes.

The report then draws together the existing studies of Gambian tourism to summarise what is already known about the tourists, their motivations and interests.

2.1.1. Consumer behaviour in tourism

2.1.1.1. Intangibility

Like other tourism products, excursions are intangible. The consumer cannot see, taste or smell the product before purchase and this introduces an element of risk such as 'Will the excursion live up to its promise?' (Swarbrooke & Horner, 2007). Excursions selling intangible cultural heritage are particularly risky purchases because they raise questions such as: what exactly is being sold? How can consumers judge the quality of the product in advance and how will they know that they got what they paid for? The implications of intangibility need to be considered in the design and marketing of cultural excursions; in particular how to articulate intangible cultural heritage pre-purchase, and how to minimise customers' perception of risk when considering purchase.

2.1.1.2. Purchase decision-making

The desires underlying the purchase decision making are complex. Each consumer has multiple 'motivators' (Swarbrooke & Horner, 2007), some of which may conflict: for example, the desires to relax and to take exercise. A holiday may be chosen to satisfy one dominant motivator at the expense of the rest, or it may represent a compromise between motivators. Holidays are usually taken in groups and this presents another level of complexity: each group member will have different motivators, and choices reflect a negotiation of these differences. A further challenge for the researcher is that there may be a gap between 'real' and 'expressed' motivators – for example, a tourist may be motivated by romance tourism but be unwilling to admit to this.

'Determinants' combine with motivators to produce actual purchasing behaviour and are also complex, operating on both individual and group levels. Determinants include past experience (for example, of other excursions), knowledge (for example, of the range of offers), circumstances (such as mobility issues or budget) and attitudes and perceptions (for example, the tourist's perception of developing countries).

Given the complex interaction of motivators and determinants, the purchase decision making process is also, unsurprisingly, complex, and purchase decision-making models are so weak as to be largely unhelpful: they are based on little real evidence, are out of date and tend to assume that tourists are both homogenous and rational. The models cannot predict how individual tourists will act and are therefore of limited use for marketing planning. (Swarbrooke & Horner, 2007). However, motivators and determinants are useful concepts for developing a richer and more nuanced understanding of the constituents of consumer demand.

2.1.1.3. The experience economy and customer value

A growing body of tourism literature studies tourism as experience, and two strands are of particular relevance to cultural heritage excursions:

The role of the customer as active participant rather than passive consumer. Franklin and Crang (2002) talk of a growing trend where "...tourists are seeking to be doing something in the places they visit rather than being endlessly spectatorially passive" (p13). Similarly, a destination manager in Sijan notes that "'Just selling handcrafted souvenirs is not enough, we must show how they are done or, even better, they would like to try it themselves' " (Morgan et al 2009, 95).

An emphasis on the emotional aspects of consumer decision making – and recognition that both purchase decision and satisfaction are an affective response to the overall outcome, rather than a rational evaluation of service attribute. In a similar vein: "The visitor's experience of place is not necessarily product oriented, but a complex interaction of motivations, perceptions, beliefs and evaluation." (Leighton & Dr Sterry, 2000)

Williams and Soutar (2000) use a broader approach to customer value which is particularly useful. They undertook a qualitative study examining tourist response on a 4WD day excursion in Australia and categorised customer value in terms of:

- Functional value; for example price and tour vehicle.
- Emotional value; the ability of the tour to generate affective states such as 'happy'
- Social value; for example how the tour fosters group membership
- Epistemic value; for example arousing curiosity and satisfying knowledge.

Functional elements proved to be particularly important in pre-tour value perceptions: "From a marketing perspective, these 'expected' functional value perceptions (seat comfort, drinks, lunch stops, tour commentary) may be more influential in customer choice behaviour for tourism products and services than some of the more sociopsychological dimensions." However, post consumption, emotional value was very important.

Epistemic value was significant in both choice of purchase and satisfaction. They therefore conclude: "The main implication is that tour operators need to change and adapt their products to create new and novel experiences for all participants" (p.14119)

Much experience economy theory is drawn from research about niches such as adventure tourism. This report will seek to establish to what extent these concepts hold true for the broader market, and particularly for sun seeking package tourists in The Gambia.

2.1.1.4. Market segments

There are many 'typologies' of tourists, based on a range of economic, social, demographic and psychographic factors. These typologies suffer from many of the weaknesses of the purchasing decision model, as well as some of their own – not least that the static categories belie the dynamics of reality in which people move between different groupings . However, at a broad brush level, some level of market segmentation is possible and useful: most package tourists in The Gambia are seeking an affordable, relaxing, winter sun holiday and differ in distinguishable ways to the small number of independent backpackers travelling there. There is an underlying assumption in the Tourism Masterplan that the winter sun tourists do not have broader interests; for example, that the narrow range of excursions is partly because "...the tourists' interest [are] confined to beach holidays..." (DOSTC, 2006, p. 46). The plan advises that niche segments, such as Diaspora tourists, would need to be attracted for cultural tourism.

However, even this broad level of segmentation has its pitfalls. As Carey & Gountas (1999) point out, the purchase of a package holiday is not a pure expression of a tourist's true preferences: a package holiday "simply provides a safe and convenient solution to the complexity of issues which affect the decision making process" (p 74). Making untested assumptions about the package market appetite for cultural excursions stifles product innovation and misses the opportunity to tap unmet demand. Carey and Gountas (1999) found that, for most package tourists, the "Most memorable aspects of their last holiday were degree of involvement with locals, learning something new and trying different food or activities" (p 75). This report will explore whether package tourists in The Gambia really are only interested in the beach, as posited in the Tourism Master Plan, or have a broader range of interests.

Mass market interest in responsible tourism

There is some evidence that interest in responsible tourism is growing, alongside broader growth in demand for 'ethical' goods (Goodwin and Francis, 2003). However, there is a well-known disconnect between consumers' intentions, as articulated in research, and their actual behaviour – a phenomenon sometimes known as the 'green gap'. Recent research into the public's understanding of environmentally sustainable tourism suggests that even green intentions are lacking (University of Surrey, 2007). The excursions which form the focus of this report have responsible goals, but they are intended to be marketed as offering experiences which tourists desire rather than appealing to 'responsible' sensibilities.

2.1.2. Cultural tourism in Africa

Cultural tourism can be defined in many ways, but generally relates to products based on what people think (e.g. attitudes, beliefs) and what people do (artefacts, way of life). Cultural tourism in Africa is usually focused on contemporary life (Akama, 2000a).

Internationally, cultural tourism is a growing, but Africa has largely failed to exploit this trend and most tourism to the continent is still marketed as sun or wildlife. Nor, where it has been developed, is it necessarily beneficial (Akama, 2000b).

Cultural tourists are often assumed to be a well-educated elite. However, with a few exceptions (Akama & Kemboi, 2000) this is largely supposition. "Specific studies of cultural tourism in Africa are relatively few [and] most of the research being undertaken also tends to be product rather than market orientated" (Richards, 2000, p. 36).

2.1.2.1. Slum tourism

Slum tourism is a useful example of cultural tourism in action. The term 'slum tourism' is used here to include tours of poor urban areas in Kenya, South Africa, Brazil and India. Although slum tourism is more generally associated with backpackers, it is becoming increasingly mainstream, and it illustrates how the intangible cultural heritage of the poorer members of a local population in a developing country can be sold as an excursion for consumption by Western tourists. Moreover, it provides insight to tourists' response to poverty which emerged from the research findings as a significant issue for tourists in The Gambia, usually inextricably linked with their interest in local culture.

Films such as City of God and SlumDog Millionaire have stimulated demand for slum tourism, as has the political fame of the South African townships. However, slum tourism is now also flourishing in less famous places such as Kiberia in Nairobi. It has become so popular that 25% of visitors to Cape Town now visit a township, and it is a 'must do' item on most tourists' agendas (Rolfes et al 2009 p.17). Tourists' expressed motivation for taking the township tour centres on learning about the culture of the local people, their living conditions and how they cope, and the historical background of the townships. Tourists to the favelas also believe that they are gaining essential knowledge about the 'real' Brazil. Demand for excursions exposing the everyday life of poor people is undeniably there, but is it ethical?

The ethics of slum tourism

Slum tourism raises unease in commentators and tourists alike: "...human misery and suffering are not straightforwardly associated with recreation" (Freire-Medeiros, 2007, p. 22). It has generated a polemical debate, carried out with vigour in journalism and the blogosphere. Given the sensitive nature of the issues and the emotional tone of the debate, it is important to disentangle the issues.

Advocates of slum tourism argue that it generates income for residents and fosters visitors' social awareness and residents' dignity. Detractors argue that it is exploitative and a form of 'poverty porn': "Slum tourism turns poverty into entertainment, something that can be momentarily experienced and then escaped from. ....Nor do the visitors really interact with us.... Slum tourism is a one-way street: They get photos; we lose a piece of our dignity" (Odede, 2010) .

Sellinger & Outterson (2009) argue that the main charge is one of voyeurism: either that tourists are seeking feelings of pleasure by demeaning the viewed objects, or that the residents feel demeaned by the act of being viewed. Yet there is no evidence that either is an inherent feature of slum tourism. Whilst the tours often elicit a powerful emotional response in the tourists, this is often sympathy rather than a perverse pleasure (Sellinger & Outterson, 2009). Likewise, there is substantial evidence that most residents feel positive about the tours for valuing their everyday life and dispelling negative stereotypes. (Rolfes et al, 2009; Maliepard, 2010; Freire-Medeiros, 2007). In fact, residents' most common complaint was about distribution of income from tours.

Cultural understanding

Poverty tourism may not be inherently demeaning, but does it enhance cross cultural understanding or reinforce stereotypes, such as "poor but happy"?

Rolfes et al (2009) compared tourists' perceptions of townships before and after the tour and found that their perceptions did alter significantly; for example many tourists found the township less depressing and with a better infrastructure than expected. In general the tourists had preconceptions challenged and left with a more nuanced appreciation of the diversity and disparity of the township. Whilst the tourists embarked on the tours with mixed feelings, they felt positive about what they had learnt, the friendliness of the residents, and the developments taking place.

Rolfes et al (2009) remain concerned that tourists are engaging in an exotisation of poverty, but conclude "Above all, township tourism should be educational tourism, and – according to our opinion – the tourists are willing to face up to the diversity, complexity and the continuous cultural change in the townships. The operators should respond to this" (p. 52).

Constructing the experience

How can tour providers present this more nuanced experience? Intangible cultural heritage is not rooted in concrete artefacts, and when the heritage being sold is everyday life it is not even constrained by a framework of ritual or performance. Township excursions, in common with the proposed excursions of this report, are entirely constructed experiences, and this means making choices about what story to tell and what ingredients to exclude. Rolfes et al (2009) describe how two tour owners, both residents of the same township, choose to portray their neighbourhood differently. One tour owner challenges the image of suffering by showing tourists positive aspects of life in the township and how safe it is, hoping that this will induce them to stay longer or return. The other tour owner focuses on the most deprived parts of the township, hoping to encourage donations. Thus, for example, the first tour visits the new well equipped hospital in the township and the second visits a run-down clinic.

All tourism involves construction: “Touristic culture is more than the physical travel, it is the preparation of people to see other places as objects of tourism, and the preparation of those people and places to be seen” (Franklin & Crang, 2001, p. 10). When it is residents’ everyday lives on show it is crucial that they have a strong voice in the story being told. Tourism often takes tourists’ pre-conceptions and plays them back to them. For example, Salazar (2003) describes how the Tanzanian tour guide school trains guides for the national parks using Western materials and concepts with the result that tourists are presented with a “...guiding discourse that actually comes out from their own cultural backyard” (p. 847). However, when local people have greater ownership over tourism, as for example with the Pueblo (Sweet, 2004), the discourse created is both more respectful to the local population and more educational for the tourists.

2.1.3. Tourism in the Gambia

2.1.3.1. Scale of demand

Tourism in The Gambia has grown steadily since the 1960s, bar occasional blips such as that following the coup in 1994 when arrivals plummeted 60% from the previous season (Bah & Goodwin, 2003, p. 11). The table below illustrates both the degree of seasonality and also the impact of the recession mid 2008, when the monthly growth is suddenly arrested. Were it not for the sudden (and unexplained) peak in March 2009 the total for this year would have slipped back to pre-2007 levels.

Month	2007	2008	2009
January	19,865	25,702	17,565
February	20,271	32,175	15,886
March	17,836	18,745	34,596
April	10,135	10,169	10,711
May	5,022	3,974	3,480
June	4,129	3,480	4,100
July	4,980	4,277	5,033
August	4,839	4,568	3,513
September	4,508	4,248	3,935
October	9,961	6,916	5,949
November	22,467	15,332	19,298
December	18,613	17,173	17,503
Total	**142,626**	**146,759**	**141,569**

Table 1: Monthly tourism arrivals. Source: compiled from data available from GTA website

The impact of the recession on the 2008 – 2009 season is illustrated by the chart below:

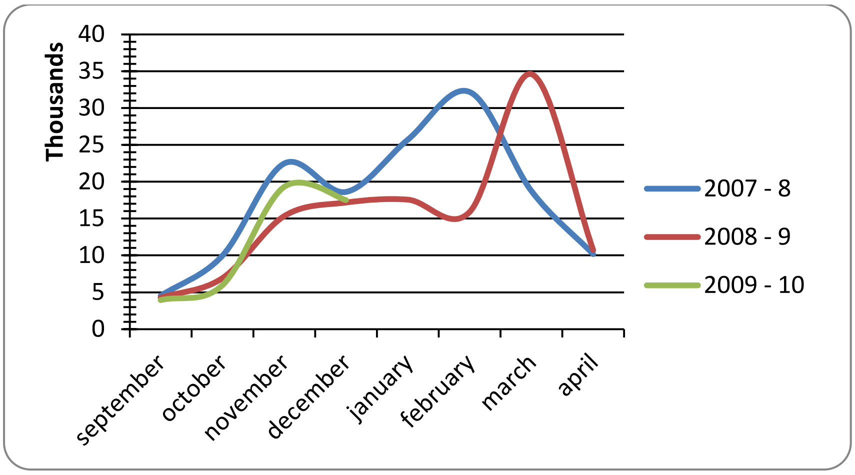

Figure 1: season trends in tourist arrivals. Source: compiled from data available from GTA website

The 2009 – 2010 season shows a slight recovery on the previous season but not to pre-recession levels.

The winter sun market is very competitive and, as acknowledged in the Tourism Masterplan, The Gambia will have to work hard to defend its market share. Nearby Cape Verde, for example, is experiencing rapid growth and can offer a malaria free environment in addition to winter sun and a similar flight time. The Gambia is one of many winter sun options which tourists choose from and the destination differs greatly from its closest competitors in fundamental factors such as infrastructure and poverty levels. Of the 58% of tourists who considered other destinations before choosing the Gambia, 26% considered The Canary Islands, with Egypt (18%) and Goa (15%) the next closest competitors (DOSTC, 2004b, p. 9)

2.1.3.2. Profile of tourists

The tourists come from a broad cross section of groupings. They are fairly evenly spread across the core 26 – 65 age range, and they are predominately travelling as couples, although a significant proportion, 11%, are travelling alone (DOSTC, 2004b, p. 11). There are few families travelling with children. Although most package accommodation is 3 to 4 star, tourists' household income is fairly evenly dispersed across all income bands. There is no significant difference in levels of holiday spending between these income bands, although the higher earners do spend more on food (DOSTC 2004a) This finding is echoed by Mitchell and Vaal (2006) who note that higher end tourists' discretionary expenditure is not higher than that of other groups in other destinations either, and therefore attracting this segment would not increase pro-poor impacts per se.

The UK is the dominant source market, providing 42.32% of all arrivals. Germans were previously the second most important segment, but following the withdrawal of German tour operators, the Dutch are now the second largest group at 12.89%. Most of the remainder come from the Nordic countries, Germany and Spain (GTA 2010).

Most tourists come for 7 days with a significant number coming for 14 days, and a smaller group coming for a more extended period (DOSTC, 2004b)

Most tourists are on their first visit to The Gambia, but there are a substantial number of loyal returners: 35% of tourists have visited before (DOSTC, 2004a, p. 20)

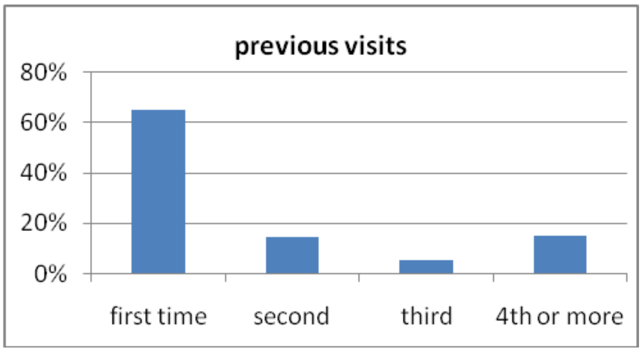

Figure 2 Number of previous visits. Source: DOSTC 2004b

Most tourists first learn about The Gambia through a tour operator (44.6%), friends or relatives (35.3%) or the internet (22%) (DOSTC, 2004b, p. 33). These surveys were conducted in 2004 and it is probable that the internet will have a more significant role now, and in the future.

2.1.3.3. Tourist interest and motivation

Most tourists come to The Gambia to for the winter sun – an overwhelming 86.3% gave this as their primary motivation for visiting (Bah and Goodwin 2003, 18). However, the DOSTC surveys reveal a broader range of interests:

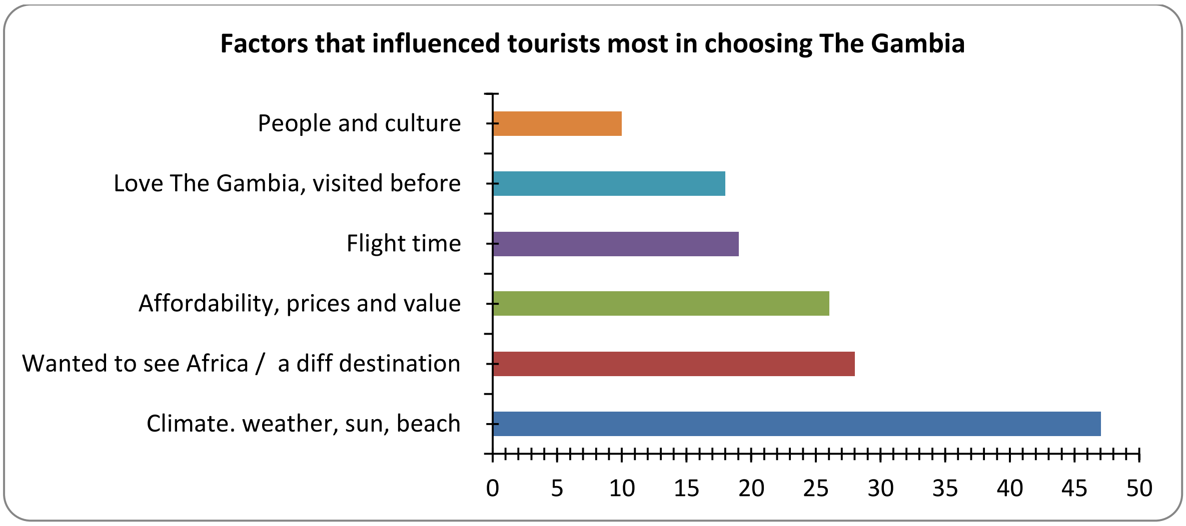

Figure 3: Factors influencing tourist most in choosing The Gambia; source DOSTC 2004a

This survey elicited a wider range of responses because tourists were asked an open question and encouraged to supply two answers. Clearly tourists are drawn by the sun, but encouragingly, the Gambia does hold a unique appeal for many tourists, and tourists are also keen to see Africa and The Gambia in particular. This is consistent with the finding that 'people and daily life' was the feature that pleased tourists most (DOSTC 2004a).

2.1.3.4. Activities undertaken by tourists in The Gambia

Only a quarter of tourists do not venture out of their hotel area. Most of the trips are to urban / resort areas such as Banjul and Kololi. About one quarter of tourists travel further afield. Most of the places visited are rated highly, with the exception of the ferry experience (DOSTC 2004b). Since the ferry crossing is perhaps the most 'authentic' experience of the group, this suggests that tourists may not enjoy too much authenticity. Only 30% of all tourists had undertaken a formal excursion and only 11% had used an official guide. This raises the question of how the tourists had done their travelling since car hire usage is negligible. Bah & Goodwin, (2003 p.17) found that 42% had used a 'local guide' for their activities. The difficulty with any of these results is that tourists will not always distinguish between formal sector guides, official tour guides and unlicensed local guides. McCombes (2008 p.89) found that 37% of tourists use bumsters for trips, which they value for providing a more 'real' experience than formal excursions. Significantly for cultural heritage excursions, tourists enjoyed visits to Gambian villages, and local guides scored the highest satisfaction rating for quality of goods and services (Bah & Goodwin, 2003).

Tourists engage in a decreasing number of paid activities each time they return:

Number of visits	Mean number of activities	Proportion of sample	USD daily spend	Proportional Informal sector spend
1	3.53	58.0%	42.6	27%
2	2.70	17.7%	36.4	23%
3+	1.83	24.3%	29.1	18%

Figure 4: Number of visits to The Gambia and number of activities. Source: Bah & Goodwin 2003

Bah & Goodwin (2003) speculate that this decrease is partly because return visitors do less sightseeing and undertake more activities independently, but also because there is a lack of new excursions on offer.

This report seeks to explore how far tourists' interest extends beyond enjoying some winter sun, if tourists are satisfied with the current excursion offer, whether there is unmet demand for new excursions and what shape that demand might take.

2.2. Distribution channels

The tour operators may have a very dominant position in the tourism industry in The Gambia but they themselves are operating under tight margins: the winter sun market is notoriously competitive and although the average tour operator surplus in The Gambia, 5.8%, is quite high for such a market, this masks the range in surpluses from specialist operators making larger margins on smaller volumes (the Gambia Experience, 11.5%) to large tour operators making smaller margins on larger volumes (First Choice, 3.5%) (Mitchell and Faal 2006, 28). The withdrawal of First Choice from the market in 2009 illustrates that margins are in fact insufficient for some tour operators.

2.2.1. Excursion overview

All airport transfers and excursions are handled by four ground handlers who have exclusive contracts with the tour operators. This near monopoly is maintained by high barriers to entry; in particular prohibitively onerous licensing requirements (see Appendix 3 for details).

Informal excursions are offered by both the licensed Official Tour Guides (OTGs) and the unlicensed local guides, who are often considered to be bumsters. The OTGs are trained and licensed to guide over the whole of Gambia but they do not have a licence to sell their services in the form of an excursion.

2.2.2 How excursion profits are shared.

Mitchell and Faal (2006 p.41) estimate that the value of formal excursion sales is shared as follows:

- Tour operators sales commission 20 – 25%
- Supplier 20%
- Ground handler, for bookings, transport and insurance 55 – 60%

Suppliers retain a very small proportion of the total value of the excursion sale, and it is tempting to conclude that the tour operators and ground handlers are making disproportionate profits.
However, it is also evident that excursion sales are crucial income streams for both tour operators and ground handlers and there is fierce completion in their provision. Tour operator commission is crucial on two scores: it provides a mechanism for augmenting slim operating margins and it provides an important supplement to staff salaries (Bah and Goodwin 2003).

For the ground handlers, excursions are their core business. Mitchell and Faal (2006) argue that excursions represent poor value for money for the tourist because the cost of the tour is only a fraction of the price paid and that this "reflects the economic power in the destination of the four inbound tour operators compared with the suppliers of excursion services." (Mitchell and Faal 2006, 41).

2.2.3 Tour operators' perspective

For tour operators in The Gambia, the single most important criteria for purchasing goods and services is health and safety (Bah and Goodwin 2003, 24). Good value for money comes a close second. Health and safety has important consequences for the informal sector because it can block participation in excursion provision and restrict the range of services or activities that the tour operator is willing to consider.

The increasingly litigious culture, particularly in the UK, makes tour operators very risk averse when assessing the health and safety of the excursions which they sell. The EU Package Travel Directive of 1992 holds the tour operators liable for claims if the excursion was sold pre-departure. This has had "...the effect of had the effect of extending to EU consumers the same rights they have in their home country to services supplied in to suppliers in developing countries" (Goodwin 2008, 3) and the burden of this is frequently carried by the local suppliers. Most formal sector excursions sold in The Gambia are sold in the destination and so should not fall under the remit of the Package Travel Directive. However, a number of recent legal judgements finding tour operators liable for excursions sold in destination have muddied the waters (Mason 2010). Tour operators, uncertain about liability, and seeking to avoid negative publicity, are taking an increasingly stringent stance on health and safety. In a developing country such as The Gambia, where typical health and safety standards are very different to those in Europe, many excursions are simply too risky to undertake from the tour operator's perspective.

Tour operators have a 'duty of care' to their tourists, and, given the commission incentive for selling their own excursions, it is unsurprising that reps are often accused of discouraging tourists from buying excursions from other providers. There is a widely held perception in informal sector in The Gambia that tour reps warn tourists against using local guides during the welcome meetings (Bah and Goodwin 2003). When an initiative to include information about ASSET members in Welcome Packs floundered, the two key reasons given by tour operators were the EU Package Travel Directive and competition (Bah and Goodwin 2003).

2.2.4. Ground handler perspective

The grounds handlers' most common concerns are about their suppliers: "confidence to supply at consistent standards" and "public liability insurance" (Bah & Goodwin, 2003).

They regard informal sector guides as 'unfair' competition, who undercut them by providing unsafe, unregulated excursions without insurance cover (Bah and Goodwin 2003). The concern over tourist safety on informal excursions is shared by tour operators and other commentators who note the lax licensing arrangements which mean that tourist taxis have very variable standards of road worthiness (Sharpley 12:4) (Mitchell and Faal 2006).

2.2.5. Informal sector perspective

Many informal sector guides are unwilling to limit themselves to the less lucrative end of the excursion market such as walking tours. Some therefore take tourists to the same destination as the formal excursions, using either the licensed tourist taxis or unlicensed vehicles (Bah & Goodwin, 2003).

In this competitive environment, the onus needs to be on developing new complimentary excursions which will expand the size of the cake, rather than joining the competition in an already hotly contested market, and on finding ways to increase the share of benefits retained by the informal sector. "There is a need for tourists to be offered excursions that reward local suppliers with a more significant return and do not place the tourist in danger" (Mitchell and Faal 2006, 41).

2.3. Conclusion

Tourist demand is underpinned by complex motivators and determinants and, despite assumptions to the contrary, this is true of package tourists in The Gambia too. Although winter sun is their primary motivator, the tourists are also interested in other aspects of The Gambia.

Market segmentation and purchase decision models tend to oversimplify consumer behaviour but customer value offers a useful framework for analysing elements of demand. Emotional and epistemic value are important for some niches, but no research exists as to the role they play in the package market.

Most studies of cultural tourism in African focus on the supply side. However, evidence from slum tourism does show that there is tourist demand for seeing the contemporary ‘everyday’ lives of local people in developing countries, and that this tourism is not inherently demeaning despite sensitivity about ‘poverty porn’. Moreover this kind of tourism can provide an income for local people and generate a sense of local pride whilst fostering a more nuanced understanding by tourists. This is dependent, however, on the choices that are made about what and how to show to the tourists.

The excursion market in The Gambia is very competitive and there are some constraints to product innovation, such as health and safety issues. However the need for new excursions is widely acknowledged.

3. Methodology

3.1. Overall approach

The research is intended to lay the basis for change in the real world, and it has been designed to deliver practical recommendations for action. Drawing on the pragmatic approach recommended by Wells, the methodology draws on ethnography and qualitative market research, aiming to develop 'useful, ground level generalisations' (Wells, 1993, p. 498). In particular, the research has been conceived and conducted 'backwards' (Andreason 1985, 176), starting with how the results will be implemented, which, in turn, determines report focus, research gaps and appropriate research instruments.

3.1.1. Research design

Qualitative research can provide a rich understanding of the complexities and contradictions inherent in tourist motivations and how these manifest in actual behaviour; for example tourist's primary motivation of relaxation and their interest in Gambian people.

For the distribution channels, the concentrated nature of the industry and the correspondingly small number of relevant respondents meant that qualitative research was the only appropriate approach.

Research consisted of in-depth interviews with tourists, tourist businesses and local experts who have substantial experience in the Gambian tourism industry. Observation in settings such as welcome meetings, and tourist behaviour on location, and review of written records such as reports, booking diaries and income spreadsheets were also used. Web based research, particularly Trip Advisor, was used to corroborate findings.

Research was undertaken on location, so that interviews could be conducted with tourists in the same circumstances in which they make purchase decisions. This allowed research to be conducted at the time of decision making, or shortly after, and so avoid the distorting effects of memory and hindsight. A further advantage of this 'real time' setting is that most interviews were conducted with people in the groups they were travelling with and could thus incorporate the influence of group dynamics.

3.1.2. Triangulation

All data was triangulated, and where possible, from very different sources. Data from tourist interviews was triangulated by cross-checking responses within the same interview for consistency, data from tourism industry professionals, data from Trip Advisor, evidence of actual behaviour, and the findings from previous visitor surveys.

Data about distribution channels was harder to triangulate, partly because much of this data is commercially sensitive but also because of the small number of respondents. A broader range of the methods was used to try and minimise this problem. Any findings included in this report which have not been triangulated are indicated as such.

Demand and distribution channels research raised different methodological issues and so are considered separately.

3.2. Demand

3.2.1. Tourist Interviews

34 interviews were conducted with tourists on location at the height of the tourist season, during one week in January 2010.

Interviews were based on semi-structured interview topic guides (see Appendix 4) to ensure that key themes were probed across all interviews, but the interview style was 'conversational' to allow free ranging conversations which gave full expression of the concerns and interests of the tourists, rather than those of the researcher (Ryan 1995).

The researcher introduced herself as a student undertaking research on tourists and excursions, as part of an MSc on Responsible Tourism. Almost all tourists who were approached consented to being interviewed because they were happy for the distraction or felt sympathy for a student trying to undertake an assignment. It is therefore unlikely that the pattern of consent introduced significant bias. Tourists seemed to be indifferent to the 'responsible tourism' purpose. This was evident when an interviewee's partner or friend joined an interview after the introduction: the interviewee would explain that they were participating in market or student research, but never mentioned responsible tourism. Responses given during interviews also indicated that tourists had not linked the interview with 'responsible' tourism. This is probably partly because many tourists were approached whilst sunbathing and so were not concentrating when the researcher introduced herself. It is also likely that the term 'responsible tourism' was unfamiliar.

The topic guide started with the tourist profile, and their experience and perceptions of The Gambia and then focused on excursions. The researcher then described a number of proposed cultural heritage excursion, to gather feedback on concrete offers and the interview finished on a more general note about highlights or unsatisfied curiosity.

All interviews were recorded on a digital recorder.

3.2.1.1. Respondent selection

Interviews were conducted at a range of venues to ensure breadth of interviewees.

Location	Feature	Number of interviews	Number of interviewees
Kombo Beach	Mid range	5	12
Bungalow Beach Hotel	Budget	10	16
Sheraton	High end / all-inclusive	8	10
Senegambia	Mid range	3	6
Bailey's beach bar	Budget	3	9
Airport departure lounge	N/A	5	10
Total		**34**	**63**

The interviewees' age range, length of stay, number of previous visits and nationality were broadly consistent with the findings of other tourist surveys. Three interviewees struggled to express themselves fully in English, but were able to communicate adequately for the purposes of the interview.

Tourists were approached where they were relaxing, at the pool side, hotel beach, at the bar or cafeteria, and interviews were conducted on the spot (Photo 6). Most were conducted with the full travelling group; in some cases partners joined in once the interview had commenced. Purposive sampling was used to select interviewees.

3.2.1.2. Analysis

The digital recordings were all reviewed and content was analysed within context of narrative flow of each interview and coded for patterns and clusters of meaning and then interrogated again in relation to emerging themes, definitions and distinctions. Content was also analysed into matrix for specific attributes (see Appendix 5).

Data was interpreted on three levels (Ereaut, 2002):

- content (for example, what the respondents said about buying the proposed excursions),
- process (for example, ways in which the couple dynamic revealed during the interview is likely to affect the decision to buy the proposed excursions)
- special effects of the researcher and interview process (for example desire to please the researcher by providing artificially positive response to the proposed excursions)

3.2.1.3. Quality issues

Researcher bias

To counteract the effects of researcher bias, Ereaut's advice was adhered to closely during both research and analysis:

"Diligent application of the hermeneutic circle, where emergent hypotheses are rigorously tested and re-tested against the detail of the data itself, will give the qualitative researcher the best chance of producing good-quality findings." (Ereaut, 2002, p. 156)

Interviewer effect

Interviewees often shape their answers to please the interviewer, and there was clearly a risk of this when tourists were responding to the proposed excursions.

To mitigate this risk, the researcher emphasised that honest responses were more valuable to the research than polite but inaccurate responses. The researcher also remained vigilant for clues that the respondent was dissembling (such as inconsistencies in the respondent's answers, pauses and signs of unease) and took corrective action. Strategies employed included affirming the validity of the respondent's preferences such as a desire to relax and reluctance to leave the hotel pool.

The green gap and social desirability bias

Given the well-established gap between intention and behaviour, the researcher employed a number of strategies to minimise this problem - for example, cross checking responses with 'reality check' question such "But although you find that activity interesting, do you think that you would *actually* book it, given that you are only here for a week and also wanted to do the Roots trip".

Data with an 'ethical' dimension was interpreted carefully with reference to the process of the interview itself and other cues. For example, a tourist spontaneously expressing an opinion on the need to generate more income for local people before the interviewer had introduced the proposed excursions indicates an autonomous interest. Other cues used to assess the sincerity and strength of opinions include the tourist's tone of voice and emotional emphasis and whether the ideas appeared to have been thought through prior to and independently of the interview. Group interaction added more data: for example a couple expressing a pre-formed consensus on an opinion showed that they had discussed the issue before the interview.

The inclusion of an existing excursion was a useful yardstick for analysing intention and behaviour, by comparing responses this excursion with those to the proposed excursions and then reviewing these in the context of actual demand existing excursion.

Distortion by emphasis

Face to face promotion of excursions is usually extremely limited in The Gambia. Discussing the proposed excursions with the tourists provided them with a level of exposure which formal excursion offers do not enjoy. There was no way of mitigating this distortion and therefore it would be a mistake to extrapolate a quantitative estimate of the potential market for the proposed excursions from the proportion of positive responses by interviewees.

3.2.2. Web research

Web research was used to triangulate findings. The main source used was Trip Advisor, selected as the travel forum most frequently cited by interviewees. Entries were scanned for comments about excursions and 'cultural' experiences

Analysis focused on hotel reviews, which is the section where most tourists write up a summary of holiday. Reviews were drawn from the same four hotels as chosen for the interviews, and from the same holiday season.

Content was analysed from the last 15 entries from each hotel (total: 60 reviews). The Things to Do comments section was also mined for relevant comments.

3.2.2.1. Quality issues

As with most online forums, only a minority of members post comments, and this group may not be representative of most tourists. However, the findings revealed that the contributors' views did not differ significantly from the interviewees with regards to key themes. Contributors clearly select only certain elements of their holiday to write about, and like other online content, this is likely to be influenced by the image of themselves they are aiming to present. The reviews were therefore not used as to generate themes but to corroborate themes emerging from the interviews. They provided a useful validation of data, being free from interviewer effect.

3.3. Distribution channels:

3.3.1. Interviews

In-depth interviews, based on topic guides were conducted with a number of tourism industry personnel. Interviewees were selected for their position in the supply chain, their experience and the availability.

3.3.1.1. Interviewees

Destination manager	Gambia Experience
Tour rep	Gambia Experience
Sustainable destinations manager	Thomas Cook
ASSET Manager	ASSET
Director of product development	GTA
Local tourism experts	2 independent professionals
Ground handler	Discovery Tours
Ground handler	Arch Tours
Ground handler	Tilly Tours
Supplier	African Home Cooking
Hotelier	Sheraton

3.3.1.2. Quality issues

Small number of interviewees

Due to the small number of tourism operators in The Gambia, and the lack of availability of some key informants during the field research period, only a limited number of interviews could be conducted. Since these interviewees came from a very broad range of positions in tourist industry, some data was not possible to corroborate. Where triangulation has not been possible, the data has either been discarded or clearly indicated as such. The small number of interviewees also increases the risk that the specific opinions of individual interviewees may distort findings.

Sensitivity of data

Some of the data is commercially sensitive or confidential, (for example, income, or supply chain relationships). To varying degrees, interviewees will have filtered responses to withhold information or adapted responses for reasons such as business reputation.

Reliability of data

Businesses are dynamic constantly evolving organisations and a change in one of many factors such as personnel or market conditions will alter business behaviour and the framework of opportunities and constraints within which they operate. In this sense the relevance of the data is always limited since it relates to constantly changing phenomena.

3.3.2. Observation

Observation was carried out in the following settings and was invaluable for triangulating data from interviews:

Business meeting

Participant observation was carried out in a meeting between a tour operator and a ground handler which provided valuable 'real life' data on key issues.

Welcome meetings

Observation of two different tour operator welcome meetings provided data on the main distribution channel in action and the messages which tourists were receiving about a range of factors such as OTGs.

Offices and conference

Visits to premises such as Arch Tours provided useful data on business culture and excursion promotion. Participation at the Gambia Hoteliers Conference allowed the researcher to hear concerns from a range of hoteliers. The presentations also included useful data from Thomas Cooks' customer satisfaction surveys

General observation

General observation at hotels, the beach, on 'The Strip' and in restaurants provided a range of insights into tourist behaviour and OTG, taxi driver and bumster activity.

3.3.3. Records and reports

Ground handler booking diaries, promotional material, tour operator excursion booking forms, and supplier income statements provided useful validation of findings.

The Travel Foundation reports commissioned by Thomas Cook in 2010 provided useful data on excursions such as supplier income, health and safety issues and tourist feedback.

4. Findings

This section starts with an overview of both formal and informal sector excursion provision. The different distribution channels, the margins they offer and power relations are reviewed. The report explores the scope for excursion innovation from the perspective of tour operators, ground handlers and suppliers. Finally, two mini case studies illustrate how an entrepreneurial approach can overcome established industry barriers.

Tourist motivation is explored, with three distinct groups emerging. Tourists' experience of the current excursion offer reveals a gap in the market for more intimate and 'authentic' excursions. Tourists' curiosity about 'everyday' Gambian life, the impact of seeing poverty, and concern about the distribution of benefits are highlighted.

4.1. Distribution channels

4.1.1. Overview

4.1.1.1. Formal excursions

The tour operators offer an almost identical range of excursions. The most popular include the 'Roots' trip, Lazy Day Cruise (a river trip). All excursions are listed on the booking sheet in Appendix 6.

Most tour operators provide their tourists with some pre-departure information about excursions; The Gambia Experience provides a fairly extensive country guide which includes most of their excursions. Tour operator websites also carry information about excursions, varying from a fairly limited overview (Thomas Cook) to a comprehensive listing (Gambia Experience). However, all excursions are booked in-country through the tour reps.

Tour reps' main opportunity to sell excursions is the' welcome meeting', held the morning after arrival. The meeting lasts about 30 – 40 minutes, and excursions are only one of several topics which are covered. The reps give tourists the booking form which provides a very brief outline of each excursion. Most hotels also have a dedicated area for tour operators display boards and 'excursion folders' which contain excursion promotional literature. However these are usually tucked away and no tourists were observed in these areas.

Although the welcome meeting is the main channel for promoting excursions, only a small proportion of tourists actually attend. A significant number of tourists who arrive on a charter flight are seat only: 39% with Thomas Cook. This casts doubt on the widely quoted statistic that 84% of all arrivals are package tourists. It was not possible to establish the percentage of flight only tourists for other tour operators, nor where these tourists stay (although the many signs advertising 'apartments to let' suggests that a proportion is staying in self-catering flats). Of the remaining 61% package tourists, only some attend the welcome meetings, usually tourists on their first visit to The Gambia. Some package tourists seek out the tour rep a few days into their holiday for advice and information about excursions. Thomas Cook estimates that last season 29% of their package tourists took an excursion.

The hotels do not sell or promote excursions themselves since they do not want to compete with the tour operators, their primary customers. However, the Sheraton certainly does sell some non-competitive products such as quad biking directly to its guests and several hotels have ‘recommended’ bird watching guides. Most hotels also have an in house entertainment schedule which includes cultural shows and sports activities.

4.1.1.2. Informal excursions

The OTGs have a designated hut on ‘The Strip’ (a stretch of road in Kololi lined with restaurants and other tourist businesses which is the most concentrated tourist hub in The Gambia, photo 1), from which they are allowed to sell their services. They are identifiable by their brown uniform (Photo 2). Some OTGs base themselves at the entrance to specific hotels such as The Sheraton.

Photo 1 – The Strip

Photo 2 – OTGs at their station

The reps at the observed Welcome meetings explained the status of OTGs and encouraged tourists to use them for local trips such as shopping. However, this is not the approach of all reps: several tourists said that they had been advised by their tour rep to use formal excursions only for insurance and safety reasons.

Unofficial guides wait in tourist areas such as The Strip or the beach and approach tourists with the aim of 'befriending' them and offering them excursions. These unofficial guides are often perceived to be 'bumsters' although it should be noted that some are offering a genuine service which the tourists enjoy.

The green tourist taxis also wait in a designated spot in the on The Strip and outside other hotels (Photo 3). They are licensed by the GTA to operate in tourist areas, but vary greatly in terms of road worthiness and safety. Taxi drivers often act as guides for excursions. The Sheraton has developed an arrangement with several green taxis which it has vetted for road worthiness and cleanliness, and which can wait on hotel grounds for customers. These taxis are of noticeably better quality than most.

Photo 3 – Green tourist taxis wait for customers

4.1.2. Excursion margins

Tour operators earn up to 25% commission on each excursion. For at least one tour operator the reps have targets of income per head, to be generated in-country from excursion sales. The head count is based on flight seats, rather than package tourists, which increases the pressure to sell to those who are on packages. This target is balanced by other measures such as customer satisfaction ratings, but it is clear that there is financial pressure to achieve substantial revenue from excursion sales. Some excursions are more profitable than others and each excursion needs to 'earn' its place on the booking form.

It was not possible to calculate how much profit ground handlers make on excursions. Certainly suppliers often only receive a fraction of the sales price – the home cooking course for example is sold by Thomas Cook for £30 and the supplier is paid circa £10.50. Transport costs for this excursion are low since the location is close to the major tourist area. In this context the ground handler seems to be taking a large cut whilst adding little value to the product. However, without information about overheads such as insurance, vehicle maintenance and staff costs it is not possible to estimate margins.   Thomas Cook recently commissioned The Travel Foundation to review their current excursions, and the report found that there were few opportunities to increase incomes for suppliers.

4.1.3. Power relations

There is fierce competition amongst ground handlers to gain tour operator contracts. One source claimed that a ground handler had resorted to providing free transfers to win the lucrative excursion contract. It was not possible to triangulate this information but it does underscore the local perception of tour operator power.

This asymmetrical power relation is repeated between ground handlers and their suppliers. Ground handlers aim to satisfy tour operator requirements whilst minimising costs. Small scale, informal sector suppliers have little leverage in this context. For example, one ground handler was cancelling the Home Cooking excursion if bookings were insufficient to fill the vehicle, even though the supplier was willing to transport the tourists herself in this situation – a solution she was using successfully with another tour operator. In this case, the supplier successfully challenged this practice, but most suppliers do not have the leverage to do this.

However, the challenge faced by the ground handlers should not be underestimated: they have to deliver a product of reliable and consistent quality which meets each tour operator’s particular health and safety requirements in a context where suppliers are unreliable and standards are very different to the European ones they are expected to achieve.

4.1.4. Scope for product innovation

4.1.4.1. The tour operators perspective

It is in the tour operators' interest to broaden the excursion offer: increasing excursion sales, providing customers with greater choice and richer experiences and differentiating The Gambia from other winter sun destinations. However there are a number of barriers to developing new excursions and so innovation often rests on individuals’ commitment.

Thomas Cook has been actively exploring how it can develop more pro-poor excursions in The Gambia and is very receptive to new ideas for more sustainable excursions such as those proposed in this report. This is largely due to the commitment of the Sustainable Destinations Manager and illustrates the importance of having a ‘product champion’. However, as a large tour operator, many of their policies are made centrally and this constrains innovation.

The Gambia Experience destination manager was luke-warm about the proposed excursions and the need for product innovation, and sceptical about the ability of most suppliers to deliver products of sufficient quality on a reliable basis. However, as a smaller specialist operator the Gambia Experience has much more autonomy and is often more flexible in practice (see Ida’s case study below).

The biggest obstacles to product development are health and safety considerations. Thomas Cook requirements are particularly stringent, and the tour operator has pulled a number of activities such as a visit to the Katichally Crocodile Pool (one of the main attractions in The Gambia) for failing to meet standards. Gambia Experience takes a more 'relaxed' approach to health and safety and offers excursions such as a boat trip at Lamin Lodge that Thomas Cook cannot.

The limited sales channels also restrict product innovation. Reps can only promote a small number of excursions at the welcome meeting, and they also do not want too many excursions on the booking form since this would spread demand too thinly, resulting in the cancellation of excursions which are unprofitable and creating disappointed guests. Products which they see as 'niche' such as the Home Cooking course are not usually prioritised.

4.1.4.2. The ground handler perspective

The ground handler perspective is determined by their overall business strategy and their contracts with tour operators. One ground handler's approach to the proposed tie and dye excursion was to suggest minimising costs by incentivising the suppliers through commission on items sold rather than paying a fixed fee for the service– an approach that would clearly commercialise the interaction with the tourist and undermine the quality of the tourist experience and the pro-poor benefits. This rather muscular approach highlights the difficulty of developing a new type of product with a partner who does not share the same vision.

Discovery Tours, currently without any major tour operator contracts, is actively developing new products, many with a sustainable focus. They are also working in partnership with ASSET to provide excursions.

4.1.4.3. The supplier perspective

ASSET has developed new excursions using local taxis for short distances and working with Discovery Tours for longer journeys. However, market access remains a problem. Selling to package tourists means supplying to the tour operators' ground handler since tour operators cannot sell 'off-sheet' without breaking their contract. The supplier has little influence in this relationship. This means squeezed margins for the supplier and vulnerability to any changes the ground handler decides to make: for example lunch was dropped from the GiG visit, with resultant loss of revenue for GiG.

Since hotels will only display tour operator excursion literature, ASSET cannot promote its excursions directly in hotels and has resorted to producing a leaflet which encourages tourists to visit its offices where they can find out about alternative excursions. Few hotels are stocking these and leaflet displays are poor. So insurmountable are these barriers that ASSET's current marketing strategy is aimed at attracting the free and independent travellers (FITs) segment rather than the large market already on its door step.

4.1.5. The exceptions

4.1.5.1. Arch Tours

Arch Tours is a licensed ground handler without a major tour operator contract which sells directly to the tourists. Set up by Abdul, an ex-army man, and run with military precision and attention to detail, Arch tours offers a similar excursion range to the tour operators but differentiates his offer by focusing on providing good customer service and relatively small group sizes with a higher staff : customer ratio. He promotes his excursions from an office on 'The Strip', and asks tourists to act as his 'ambassadors', recommending him to other guests. He maintains that he has tours going out every day and his booking diary supported this claim. Evidence from tourist interviews confirms that Arch is highly successful in generating satisfied customers and word of mouth recommendations. However, it is important to note that Arch is run on strict business lines and no evidence was found to suggest that it generates more benefits to suppliers than the mainstream excursions.

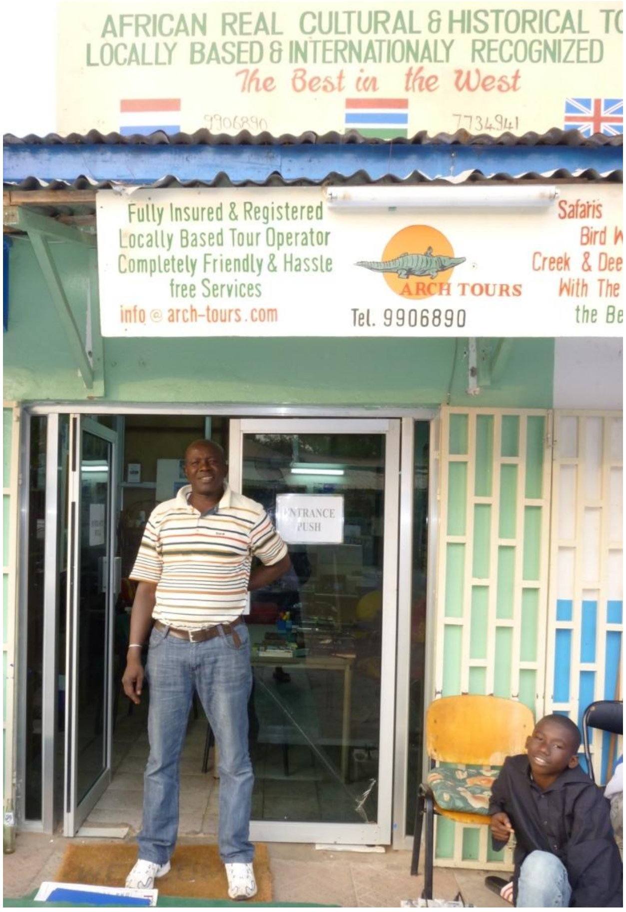

Photo 4 – Abdul, Arch Tours

4.1.5.2. Ida Chan

The Home Cooking course is offered by Ida Chan, who has many years of experience in tourism and catering. Tourists dress in traditional clothing, go to the local market to buy ingredients and prepare and eat an African meal with Ida and her family in their compound. Ida clearly understands tourists needs and interprets Gambian culture in an interesting and accessible way. The excursion is very successful, with positive reviews in travel articles. She supplies to both Thomas Cook and Gambia Experience, relationships which were developed direct with the tour operators, not via the ground handlers. In the case of Gambia Experience a mutual contact introduced her to the head office in the UK, and business was secured this way. Her excursion is featured prominently in their brochures and website which also provides a direct link to Ida’s own website. Gambia Experience sell her excursion direct and not through the ground handler. This is a rare example of a tour operator selling ‘off sheet’ and may be because Gambia Experience has a substantial stake in their ground handler. Without a ground handler in the equation, Ida makes much higher margins than with Thomas Cook.

4.2. Demand

4.2.1. Motivations

4.2.1.1. What the tourists come for:

The tourists' primary motivation is relaxation, and they chose The Gambia for its guaranteed winter sun, convenience and affordability. However the highlight of their visit is almost universally 'friendly people', and for return visitors this was also one of the main reasons for coming back. Many tourists were repeat visitors, with a significant minority who had been at least five times. Many of these serial repeaters were returning to visit Gambians they had formed a relationship with – usually in the form of sponsoring a family.

4.2.1.2. What they want to do whilst there

Relaxation was the priority for all tourists but three distinct groups emerged in terms of approach to their holiday:

- *Relaxers* – these tourists had a single-minded dedication to relaxation. If they did go on an excursion it was one with a more conventional 'leisure' focus such as The Lazy Days Cruise or bar crawl.
- *Gambian Friends* – these tourists had established relationship with Gambians, ranging from 'romantic', to sponsoring a child or family. They generally had little interest in excursions because their Gambian friends act as guides.
- *Curious* – these tourists had an interest in some facet of Gambia (usually 'everyday life', see below) which they wanted to explore further. They tended to feel that they 'ought to get out and see something of the country'. They ranged quite broadly in terms of how much time they were willing to devote to this, or how deeply they wanted to explore, but they all wanted to experience something in addition to relaxing at the beach or pool.

Almost half the tourists interviewed fell into the Curious group, Relaxers comprised almost a third with Gambian Friends constituting the remainder.

These three groups defied further categorisation, and there was no correlation with behaviour such as length of holiday or number of previous visits, or market segment such as hotel grade, or age. The Relaxers were concentrated in the Sheraton, which offers all-inclusives, but they were also found in other hotels. The Gambian Friends group had clearly been many times before, but so too had many of the Curious and the Relaxers. The Curious group encompassed a very broad range of tourists in The Gambia, but they expressed a surprisingly coherent consensus on what they were interested in and what they thought of excursions. Ida also finds that her customers cannot be defined by factors such as age or hotel grade, but they have an 'adventurous' attitude in common.

Photo 5 - Sheraton

4.2.2. The tourist experience of current excursion offers

4.2.2.1. How tourists learn about excursions

Most tourists had had information about excursions from their tour rep, although not all of these had attended welcome meetings. Many also asked their rep for advice on excursion choice.

Discussions with other guests, or overhead conversations, about tourists' experiences of excursions were very influential in decision making:

> *"I've heard that the trips are a bit trying, too long and hot" (C1)*

Most tourists had done some pre-departure web research, usually visiting the Gambia Experience website (which many mistook for the official tourism website of The Gambia) and Trip Advisor. They had searched for general information on about the country, things to do, and reviews of hotels. However, awareness of specific excursions is mainly picked up in country.

Those who used Arch Tours knew about them by recommendation, coming across their office on The Strip, or from having used them on a previous trip.

4.2.2.2. What tourists are choosing to do and how satisfying they find it:

Not choosing any excursions

Some tourists did not want to go on any trips at all. These are mainly tourists with Gambian friends and some of the Relaxers, especially those on a one week holiday. A few of the 'Curious' group had explored the excursion offers but decided not to book for various reasons such as 'too expensive', or the one which appealed was fully booked (usually the Roots tour) or fears that the trip might be 'too intrusive'.

However, the most common reasons for not booking a formal excursion were large group size and length of coach journey. These concerns were often rooted in prior experience, often gained in another country, of tour operator excursions.

Many tourists did not feel confident to book an informal excursion, usually because of concerns about safety, honesty of guide, implications for travel insurance or just anxiety about the unknown. Negative experiences of bumsters had reinforced these concerns. These anxieties are echoed on Trip Advisor.

Formal excursions

Most tourists had taken a formal excursion with their tour operator, usually the Lazy Days cruise, the Roots trip or the Senegal tour.

The Relaxers tended to be happy with their trip because it met their leisure goals.

However the Curious were largely unenthusiastic about their experiences, although those who had booked the river cruise were satisfied. The most common complaints related to group size, cost and a 'commercial' feel.

> *We went to the Crocodile Pool ...and we walked in there and it just felt like a herd of cattle" (D3)*
>
> *The group was too large. Can you imagine – 50 people in Serekunda [market] and <u>one</u> leader, saying [mimics tone of desperation] 'Stay close to me, stay close to me'? (C5)*
>
> *It seemed to be structured around people selling you things (C6)*

A few had booked with the tour operator reluctantly, because they were nervous about taking a trip with OTG / local guide.

> *We don't particularly like organised tours' and we wouldn't use them in Europe, but we were recommended not to do other trips (A2)*

The tourists who had done an Arch tour excursion were very positive about their experience. They particularly liked the level of customer service, the small groups and the insight they felt that they had got to the 'real Gambia'. Some also thought that it was cheaper than the tour operator excursions. This positive feedback is also reflected on Trip Advisor. Arch Tours is clearly successful in generating customer loyalty.

Local guides

Many tourists who had done formal excursions had also used a local guide for a shorter trip such as visiting a craft market. These guides were either OTG or taxi drivers (usually selected by recommendation), or a member of staff from their hotel or a restaurant. The tourists were very positive about these experiences, which they valued for insight into the 'real' Gambia and the personality of their guide. This high satisfaction with local guides is echoed on Trip Advisor hotel reviews and discussion forums.

4.2.3. What the tourists want to see more of: 'everyday life'

A few of the curious group were interested in wildlife, but the vast majority were interested in what is best termed 'everyday life'. Their interest is very broad:

> *What their culture is, how they live, what they do, how they do it (B2)*
>
> *To see how they really live (F2)*

They wish to see 'the real Gambia', or at least a hint of it, which they believe exists beyond the resort areas. Tourists who felt that they had experienced this already had been with Arch Tours or had been invited to a local Gambian's house. Relating this experience was always the most emphatic and enthusiastic part of the interview and frequently described as 'a real eye opener'.

Several tourists had visited a household or staff compound, by invitation from a Gambian they had met – often staff from their hotel or a waiter. They usually rated this as the best part of their entire holiday – 'a real privilege'. The tourists were struck by the poverty and also dignity of their hosts and were often overwhelmed by the experience. There is a similar discourse on Trip Advisor.

Some tourists enjoyed chatting to Gambians such as staff at their hotel.

> *'Make time, get to know them and find out a bit more about their lives.' (B1)*

4.2.3.1. Dimensions to 'everyday life' interest:

Tourist interest in 'everyday life' has a number of dimensions that are significant for developing excursions.

- Warmth, friendliness and pride: tourists were inspired by how happy Gambians seemed to be and particularly valued the warmth with which they were treated and the pride that the people they visited displayed when showing tourists around.

  > *We were struck by the warmth, how open everyone was (A2)*
  > *They love their country (D7)*

- Curiosity about the mechanics of everyday life: tourists are intrigued as to how people live in an environment which is materially so different to their own

  > *They allow you to draw water from the well and show you how to pound rice – <u>that</u> sounds interesting (D6)*
  >
  > *My wife spent the whole day in the kitchen with her, seeing how they cook (F3)*

- Poverty: tourists are both curious and disturbed by the poverty in The Gambia. They see it as a significant element of life in The Gambia that should be acknowledged, but also as difficult to deal with as a tourist. For most tourists it is their first time they have been exposed to such levels of poverty and it generates many strong and often conflicting emotions and often a new perspective on their own lives.

  > *When we went to see their houses, how they actually live, such an eye opener!*
  > *It's something you should see (B2)*
  >
  > *Really weird seeing the things that they have. Makes you appreciate what you've got at home (E4)*
  >
  > *I heard that some of that some of the trips are a bit heart wrenching because of the poverty. I haven't come for that (B1)*

Most tourists are fairly tolerant of bumsters because of this sensitivity about poverty, and many tourists respond by donating money or resources to families they develop a relationship with, schools they visit or other projects. This 'charity' element is a particularly striking feature of tourism in The Gambia. Many tourists had brought items to donate (for example: a suitcase of football shirts for children) and some were sponsoring Gambians in some form (for example: a tourist who had sponsored a young Gambian's education through school and even university in England).

- Ambivalence about authenticity: tourists wish to see the 'real Gambia' but are wary of being overwhelmed by it and also nervous. Several tourists were shocked by insanitary conditions at local cafes and markets, and some felt guilty at their own unease. Some tourists are also concerned about being intrusive:

I heard that [the tour group] went in when someone was cooking and they found it fascinating but I thought it sounded a bit intrusive. Either it's intrusive or it's staged and neither are appealing' [D6]

This is one reason why visits to schools are popular as they offer an unthreatening and accessible entrance point. Tourists are not searching for authenticity in the sense of 'untouched by tourism' but are looking for something more educational and personal, and less 'commercial' than that offered by tour operators.

4.2.4. How they want it delivered

Greater benefits for local people

Almost all tourists were concerned about the extent to which local Gambians benefit from tourism. They raised the subject unprompted and talked about it with emphasis: it was clearly sincerely felt. Tourists' ready articulation of their concerns, and the pre-established group consensus indicated that they had discussed the issue independently of the interview. Concern was driven by the impact of seeing poverty firsthand.

> *'You want to feel that both parties are getting something out of it', [wife]' yeah and some of the money is getting ploughed back in'. (C6)*

Some tourists were cynical about tour operators who made claims of local benefit and some tourists preferred to use local guides to disperse benefits. Several tourists believed that tour operators have a stranglehold on tourism and are taking a disproportionate cut:

> *'If you're not careful the tour operator will take everything.' (E6)*

Some tourists raised the issue that benefits are not fairly disbursed because the same schools or front of house staff always profit.

Price

Some tourists feel that the excursions are too expensive; particularly those tourists who had secured heavily discounted flights. However tourists were unsure what constituted a fair price and many volunteered that they would be willing to pay more if they believed that local Gambians would benefit directly.

Other issues

- Group size: a large group size is disliked for the time it adds to excursions (extending pick up and drop off times, long lunch queues), and the way it impacts on the experience (discussed above).
- Long journeys – an issue for many but not all tourists, who are unwilling to submit to a long hot journey, especially when on a one week holiday.
- Early starts and long days are disliked by some tourists because of the loss of relaxation time and previous experience of excursions being 'padded out' with uninteresting experiences.

4.2.5. Response to proposed excursions

The researcher outlined key features of the proposed excursions (small group size, local ownership) and then described, on average, three from the following list:

- Tie and dye excursion – a half day activity with a women's Tie and Dye association, based in a compound, learning the technique and producing own design
- Bee keepers – visit to Sefo Bee Keepers' Association, with the opportunity to make beeswax candles
- Day in the life of: spending the day with a Gambian to learn about their everyday work, e.g. teacher, farmer.
- Home cooking experience: as currently offered by Ida Chan
- Ninkinanka – a river trip themed on tale of mythical dragon, exploring villages and their different cultures.

Significantly, many of the Thomas Cook or Gambia Experience tourists were not aware of the Home Cooking excursion, despite its being one of their listed excursions.

4.2.5.1. Tourist interest

Almost half the tourists asserted that they would book at least one of the excursions; these were emphatic responses such as 'Definitely' rather than mild interest. The Curious tourists were attracted by the chance to gain an insight into 'everyday life'. The small group size and economic benefit to locals were, unsurprisingly, popular features.

> *You'd be getting the Gambian experience, what they really do, that would be awesome I think' (B2)*
>
> *'We'd be first in the queue, which we never are normally [for excursions]' (A2)*
>
> *'You feel that ... [tour operator excursions] are really structured for you to spend some money but you're not sure where the money's going whereas if it's going to the locals that's more appealing. '(C7)*

Other popular features:

Half day excursions

Keeping the end product (Tie and Dye excursion) as a souvenir

River trips

Seeing particular professions in action (A Day in the life of...) held strong appeal for some tourists.

4.2.5.2. Tourists' reservations

Some tourists expected these trips to be plagued by many of the negative features that they had experienced on formal excursions, in the Gambia or elsewhere.

Some tourists doubted that the trips would be 'authentic'. For example, several interviewees dismissed the Tie and Dye trip on the basis that it would be similar to 'batik factory' – part of a tour operator excursion where tourists are given a brief demonstration of batik making and are encouraged to buy souvenirs. Several interviewees were wary of seeing 'staged' events, although they also believed that a degree of staging was both inevitable and acceptable. Some thought that it would feel false, especially the Home Cooking excursion.

It was clear that a few interviewees assumed large group sizes despite the introduction to the contrary.

Many tourists were concerned that they would be subject to hassle on such trips. These tourists had found dealing with bumsters very stressful and some had become hesitant to leave the hotel because of it. Their experiences had led them to assume that bumsterism and begging are pervasive traits in The Gambia.

> *'I'd be worried about being swamped by the community begging from you.' (D3)*

Some tourists were suspicious about whether economic benefits would genuinely reach local Gambians and a few tourists asked for concrete percentages as evidence.

Tourist responses also reflected personal taste. This was particularly true of the Home Cooking course, with many women responding that they wanted a holiday from cooking, and the Day in the life of, where some tourists were very interested in a seeing a specific profession in action (usually their own) but not any others.

Few tourists wanted the excursion to include an overnight stay because they were worried about illness (for example contracting yellow fever or a tummy bug) and insanitary toilets or did not want to relinquish the comfort that their hotel afforded.

For more detailed responses to the specific excursions, see Appendix 7

5. Discussion

1.1. Demand

There is demonstrable demand for excursions based on intangible cultural heritage. The finding that tourists are interested in Gambians' everyday life is corroborated by the DOSTC survey finding that 'People and daily life' was the feature that most pleased tourists about their holiday. Tourist curiosity about peoples' everyday lives in developing countries is also reflected internationally in the spread of slum tours.

Tourist enthusiasm for the proposed excursions is encouraging. Almost half the interviewees felt that they would book one or more of the proposed excursions, which suggests that they are not merely a niche product but have broad appeal. Of course, intention to buy does not always translate into purchase behaviour, particularly with 'responsible' products, and whilst every attempt was made to mitigate the 'green gap' effect, the fact that the interviews included description of the proposed excursions perhaps gave them undue prominence. It would not be appropriate to extrapolate an estimated size of demand from these findings. However, the inclusion of the Home Cooking amongst the proposed excursions creates a useful yard-stick since it allows comparison of booking intention with actual behaviour. The fact that this excursion was not as appealing to as many interviewees as most of the other excursions is very encouraging since in reality it is successful in attracting considerable numbers of customers. This strongly suggests that, given effective market access, the other excursions would elicit substantial numbers of bookings.

1.1.1. Customer value

The findings reveal a mixture of motivators and determinants which can be used to shape excursions of high customer value.

1.1.1.1. Epistemic value

The intangibility of 'everyday life'

'Everyday life' is a very broad and intangible focus for an excursion and there needs to be a concrete activity for the supplier to provide and that tourists can recognise as a product they can consume. The foci of the proposed excursions, such as Tie and Dye, were created for this purpose, and from tourists' responses it was evident that many believed that these foci would offer them the chance to experience 'everyday life'. However, personal taste plays an important role in excursions choice and any given focus will inevitably deter some tourists. The more specific the focus of the excursion, the narrower (but often more ardent) the customer base.

Authenticity

Tourists are keen to gain access to 'real' Gambian settings such as family compounds, but wary of it being 'false' or intrusive. Genuine local involvement in excursion development would give the excursions an authenticity absent from formal excursions offers and foster greater understanding and respect between tourists and local Gambians. As is the case with slum tours, it is local people's lives that are the subject of the excursions, and they have the right to decide how they want their lives represented.

However, tourists' appetite for authenticity is bounded: whilst they wish be exposed to something more 'real' than what they can see within the resort areas, there is an ambivalence about how 'authentic' they want the experience to be and a limit (often a fish market) to how far they want to be moved from their comfort zone. Tourist curiosity is also tempered by their overall relaxation goals and unease about poverty. Tourists are happy to accept a degree of staging, as long as it does not have a commercial feel.

1.1.1.2. Social value

Quality of interaction

Interaction with Gambians is both the most enjoyed and the most disliked element of tourists' holidays and therefore the quality of this rapport is key to customer value. Tourists find hassle from bumsters or sellers wearing and formal excursions tend to foster a passive interaction where tourists 'look at' the locals, or a charitable type interaction where tourists pity / give to local people. On the other hand, the friendliness of Gambians is the highlight of most tourists' holidays and the surprisingly high number of tourists who had been invited to visit a Gambians' house spoke of this experience as their most treasured holiday moment.

Interaction can be categorised as follows:

Type of interaction	Gambians	Tourists	Practical example
Passive	Observed	Observer	Tourists 'view' Gambians on formal excursions
Commercial	Seller	(Reluctant) Purchaser	Tourists are 'sold to', or hussled (bumsters)
Charitable	Victim	Donor	Gambians are presented as 'in need' to elicit donations, or tourists seek out opportunities to give
Hospitable	Host	Guest	Gambians invite tourists to their house for a meal

Figure 5: Type of interaction. Source: Author

Excursions which fostered a host guest interaction would be offer high social value to tourists.

1.1.1.3. Functional value

The functional elements of the excursions are important because the combination of the tourists' relaxation goals, their concerns about standards and the intangibility of product render tourists very risk averse. Functional value is the most concrete element of the product, and high functional value can minimise the perception of risk when deciding to purchase.

Group size is critical to tourists. Tourists are also concerned about levels of health and safety outside resort areas and wary of the risks of catching an illness or suffering an accident, or invalidating their insurance.

Half day excursions are attractive to tourists because they do not require the sacrifice of a whole day's relaxation. Tourists are willing to undertake full day excursions as long as they do not think the day has been 'padded' out with time wasting elements. Fewer tourists are willing to do an overnight excursion because they fear that the accommodation would be less comfortable than their hotel, and that they may be exposed to illnesses such as malaria. There is also an element of fearing the unknown.

1.1.1.4. Emotional value

Overall affective response to a product is the primary source of customer satisfaction and is what tourists remember most afterwards. It is therefore very important for word of mouth recommendation. Tourists in The Gambia feel very strongly about their brushes with 'everyday' life in The Gambia. Underlying this is a strong emotional response to the poverty that they are confronted with. The tourists have come for a winter sun holiday, and the Canaries are the most likely alternative they might have considered. It is unlikely that they are anticipating feeling anything except relaxing sunshine, and they are unprepared for the poverty which they find. For many tourists this is their first experience of witnessing poverty first-hand, and they are unused to such stark inequality. This unaccustomed sense of difference is aggravated for most tourists by standing out as light-skinned in an environment where most people are black. When tourists spoke about confronting this poverty it was clear that it had affected them strongly; they were frequently emotional and tended to used language like 'heart wrenching' or 'a real eye opener'. Similar language is used by tourists on township tours.

The poverty elicits a mixture of curiosity and unease in tourists. The curiosity sparks tourist interest in people's everyday lives: how they cope, and often, admiration at how they transcend conditions that the tourist cannot imagine managing themselves. In this context some tourists find Gambian's pride inspirational. Tourists also value the sense of perspective they gain about their own lives. The unease is often channelled into the charity activity which is so prevalent in The Gambia.

Concern about poverty drives tourists to question how tourism benefits local people and fuels a sincerely held desire to see more of the money they spend going directly to the hands of the local Gambians. There is a perception that the status quo is unjust. This aggravates tourists' discomfort in the face of poverty, and most tourists wish to direct their spending so it can benefit people directly. This is no 'green gap' or 'interviewer' effect: most tourists hold strong views about the subject, which they had discussed with each other outside of the interview, and feel frustrated that much of their expenditure is captured by the tour operators.

Given tourists' desire to see local people benefit more from tourism in the Gambia, and their concern about poverty, explicitly pro-poor excursions would generate a feel-good experience for tourists, knowing that the excursion offers direct benefits to local people and helps tackle poverty constructively. The act of purchase itself would offer high emotional value for tourists.

1.1.2. Purchase decision making

The vast majority of tourists have come to relax. When tourists consider doing excursions, they balance what the excursion offers them against the impact on their relaxation goals: for example, how much time it takes out of their sunbathing time, how tiring the trip might or the worry about how safe it is.

The risks inherent in making an intangible purchase are exacerbated by the unfamiliar environment. Tourists worry about these risks, and their desire to relax makes them particularly risk averse, so they often choose the 'easiest' and least anxiety provoking choice, either not undertaking an activity at all, or choosing the formal excursion even if it did not greatly appeal to them.

Tourist concerns often centre on the 'functional' elements of excursions such as length of journey, safety and hygiene, insurance, comfort and group size. Previous experience also informs purchase decision making and many tourists assume that features that they have disliked on other excursions, often in other countries, will be present on all excursions. Such features usually include lengthy drop off and pick up times and long lunch queues caused by large group sizes.

Tourists' negative experiences of hassle and overly commercial interactions lead some to assume that these will be features of all excursions and they fear that they will be 'swamped' by people begging or hawking. These tourists assume that these are inherent features of locals' interaction with tourists. They are unaware that much 'hassle' derives from lack of local ownership in tourism, and that more local involvement would generate a more mutually respectful interaction.

1.2. Distribution channels

1.2.1. Tour operators - advantages

It is evident that tour operators offer the best distribution channel in The Gambia. With tourists concentrated in such a small area, no option to sell direct through hotels, and tourists spending most of their time at the beach or pool, there are few viable alternative channels.

Tour operators can offer guaranteed access to large numbers of tourists, and have established commission mechanisms and booking handling procedures in place. Selling through a tour operator would also reduce the amount of investment on marketing and promoting that would otherwise be needed to attract tourists' attention to the excursions.

A supportive tour operator can also offer added value. For example, with the support of a key individual 'championing' the excursions within a large tour operator, the excursions could gain support from other areas such as The Travel Foundation. Ida has benefited from Gambia Experiences Press and PR campaigns by hosting journalists who have featured her in travel articles. The direct link to her own website from that of The Gambia Experience has no doubt increased her numbers of direct bookings too.

1.2.2. Tour operators - disadvantages

Supplying through a tour operator usually means very small margins since both the ground handler and tour operator need to generate profits from the excursions. This can result in very marginal returns for the suppliers and there seems to be little room for increasing the supplier take from this three way relationship in practice.

Tour operators have to ensure that all their excursions meet strict health and safety standards, and these are stringent for the large international operators such as Thomas Cook. The increasing levels of litigation, the need to protect reputations and the uncertainty surrounding EU Package Directive rulings make tour operators very risk averse. This severely limits and constrains what excursions they can offer, and meeting the standards in a developing country such as The Gambia can be onerous for suppliers.

Selling through a tour operator means supplying to a ground handler, and because of the power relations in the industry in The Gambia this means ceding control over much of the excursion. Ground handlers may look to minimise costs by reducing supplier payments, may insist on using their own guides or may decide to drop an element of the excursion. Since tour operators have exclusive contracts with ground handlers, there is no choice in ground handler, and it will be difficult, if not impossible, to embed pro-poor principles and foster positive interaction if the ground handler does not share these values.

The narrow sales window (the Welcome meeting and booking form) may also pose problems. The tour reps may well consider the products to be niche ones and prefer to concentrate on promoting the bigger sellers which draw in more commission. There is also a limit to how many new excursions a tour operator would include on its booking sheet.

Selling the excursions through the tour operator means that it would be harder to differentiate the excursions from their other products and convince tourists of their benefits such as small group size, greater equity and local ownership.

Even if individual reps and destination managers are won over to the value of the excursions and keen to promote them, the high staff turnover of large tour operators means convincing new staff on a regular basis. Reliance on the support of an enthusiastic champion is also risky for this reason. The biggest risk of relying on one tour operator, however, is that the operator themselves withdraws from The Gambia, as has recently occurred. These risks do vary with tour operator. The Gambia Experience, as a specialist tour operator, is more inextricably linked to the Gambia than other operators and has a more stable staff base.

The alternative

Selling direct to tourists is clearly a challenge, and one which ASSET has struggled with for several years. The concentration of the market in tour operator hands, and the lack of alternative distribution channels mean that options are restricted. However, the experience of Arch Tours does prove that it is possible to overcome these obstacles successfully.

6 Conclusions

6.1. Demand

6.1.1. Tourist motivations

The Gambia is promoted as a winter sun destination, and the findings of this report and of other surveys show consistently that tourists' primary goal is relaxation. It is tempting to assume from this that package tourists are a homogenous group, without sufficient broader interest in The Gambia to sustain new excursions - a position largely adopted by the Tourism Masterplan. However a package holiday is not a pure expression of a tourist's preferences but a convenient compromise, and exploring tourist motivators and determinants in greater depth reveals a more complex picture. Some tourists do have a single minded dedication to relaxing, especially those on all-inclusives. A number of repeat visitors have established relationships with Gambians and use their contacts for trips. However a significant proportion of tourists does have a genuine curiosity about The Gambia, and would like more opportunities to explore the intangible cultural heritage of the destination. These tourists seek to satisfy their curiosity by undertaking excursions or trips with local guides and taking up offers of hospitality from Gambians.

Given the lack of studies exploring demand for cultural heritage in Africa, this reports' findings provide an encouraging indication that there is market for this type of tourism. Tourist motivations in The Gambia appear similar to those of 'slum tourists', echoing an international growth in demand for excursions which offer Western tourists with a glimpse of contemporary life in developing countries. This reports' findings also challenge the assumption that cultural heritage tourism is restricted to niche market segments: if mid-low end winter sun package tourists have an appetite for cultural tourism, then demand is surely broadly based.

6.1.2. Tourist satisfaction with current excursion offers

Most tourists to The Gambia chose between tour operator and informal excursions, and for many tourists neither option really meets their needs. The tour operator excursions offer reliability, ease and higher standards of health and safety but also the disadvantages of large group sizes and little epistemic value. The leisure excursions such as Lazy Days generally satisfy tourists, but the curious group were ambivalent about the other excursions. Tourists are surprisingly tolerant of the low value which formal excursions offer, in part because of low expectations based on previous experience.

The informal sector offers a greater insight into 'real' Gambia but, for many tourists, too little functional value in terms of safety, insurance and reliability. In this context Arch Tours successfully occupies a middle ground, offering both security, better customer service and a more intimate experience. It is not, however, run on pro-poor principles.

There is a need to refresh the tired and limited excursion offer and develop new products which provide tourists with new experiences and generate greater benefits for local Gambians.

6.1.3. Unsatisfied demand

Tourists are motivated by the desire to see 'everyday' Gambian life and have opportunities to interact with Gambians. In particular, tourists are curious about Gambians' ability to 'cope' in an environment so materially different to their own and value their warmth and pride. Tourist curiosity is stimulated by the impact of witnessing poverty first hand, an experience which also arouses uncomfortable emotions.

Excursions which offer an intimate experience of everyday Gambian life, a host -guest type of interaction with local people, confidence of reasonable levels of safety, hygiene and comfort, and evidence of direct local benefit would offer high levels of epistemic, functional, social and emotional value.

Developing excursions that would provide this range customer value is certainly achievable, but only if certain issues are addressed:

6.1.3.1 Epistemic value

There are a very large number of possible foci in addition to those of the proposed excursions such as other productive activity, sports, village theatre, festivals. However, to render these excursions interesting and enjoyable, both excursion design and interpretation must be underpinned by a good understanding of tourists' needs and motivations. Such understanding is one of the main factors contributing to the success of Ida Chan's home-cooking excursion. Ida Chan has many years of experience in the hospitality industry; most Gambians do not have this experience to draw on and would require support and training.

6.1.3.2 Social value

There are many ways of presenting peoples' everyday lives, as illustrated by the description by Rolfes et al (2009) of how two excursions tell very different stories of the same township. A common approach in The Gambia is to present local people as grateful recipients of charity and structure excursions to encourage donations. However tourists also value local Gambians' pride, dignity and ability to cope. Rolfes' study suggests that tourists are receptive to engaging with the" diversity, complexity and the continuous cultural change in the townships "(Rolfes et al, 2009, p. 52). Excursions focused on productive activities such as tie and dye, or cultural myths such as the Ninkinanke, provide an opportunity to switch the discourse away from charitable one to one with a more dignified and genuinely Gambian focus which is more likely to foster mutual respect.

To create a host-guest relationship for excursions which take place within a broader community setting (such as a village), the excursion would need the consent of members of the wider community, not just the suppliers, and provide some broader community benefit. Communicating this benefit to tourists might assuage the fears of those who worry about being 'swamped' by people begging.

6.1.3.3 Functional value

Unless the excursion offers a certain level of safety, comfort and hygiene, most tourists will not enjoy the excursion, but functional value is perhaps most crucial at the booking stage, both to allay tourist anxieties about purchasing and to overcome preconceptions from previous bad experiences.

6.1.3.4 Emotional value

The key to providing high emotional value is to provide tourists with opportunity to resolve their ambivalence about poverty: enabling them to satisfy their curiosity about everyday life in a guilt-free way, knowing that their experience is benefiting their hosts directly. Tourists hold a range of views about local benefit, some of them partial or quite inaccurate, and tourists need explanations as to how pro-poor excursions would enhance their own experience and benefit suppliers.

6.1.4 Tourist response to the proposed excursions

The ‘curious’ group of tourists embraced the proposed excursions as a means of satisfying their interest in everyday life, and almost half of interviewees felt that they would definitely book one or more the excursions. Given that the Home Cooking course was not the most popular of the proposed excursions, and yet it attracts significant numbers of actual bookings, this report finds that tourist interest in the proposed excursions would convert into substantial numbers of real bookings.

Demand was influenced by the focus of the excursion and revealed that personal taste plays a significant role in excursion choice. Although any given focus will deter a number of ‘curious’ tourists, the breadth of demand is sufficient to accommodate this.

Two other key features are small group size and local economic benefit. Tourists felt particularly strongly about the importance of local benefit, offering a willingness to pay more if they believed that local people would benefit directly.

However, tourists’ perceptions of excursions are heavily influenced by previous bad experiences. These preconceptions are hard to dislodge and would play a crucial role in the decision to purchase. Many tourists persisted in anticipating features such as large group size or a ‘commercialised’ or ‘false’ experience. To overcome these preconceptions, the excursions would need to be clearly differentiated through effective marketing. Many tourists are also cynical about tourism industry claims, particularly about ethical practices, and so any claims would need to be validated by evidence (such as the level of benefit to suppliers) or legitimated by a trusted source (for example, a registered charity).

Given tourists’ sensitivity to the risks of purchasing excursions, their primary motivation to relax and their negative preconceptions, excursions would have to be carefully packaged to overcome the barriers to purchase and to communicate excursion benefits clearly and emphatically. The limited opportunities to promote excursions and articulate their benefits, together with a rather passive target audience who spend little time considering the different offers, further increase the packaging challenge and highlight the significance of distribution channels.

6.2 Distribution channels

Tourists in The Gambia will only purchase excursions if it is easy for them to find the relevant information and make the booking. Market access is crucial.

Ultimately there is no one distribution channel which can guarantee market access with acceptable levels of risk and at sustainable margins. Whilst tour operators offer the only established distribution channel, they also have substantial disadvantages: the requirement to supply through their own ground handler, resulting in low margins and loss of control, major constraints on product development (especially health and safety), the difficulty in establishing a point of difference from the current formal excursion offer, and, ultimately, the risk that the operator withdraws from the destination. However, the lack of established alternatives means that not using tour operators for distribution entails committing substantial time and other resources to creating access.

However, as the examples of Arch Tours and Ida Chan demonstrate, with a determined and entrepreneurial approach, new routes to market are achievable. Selling off-sheet, for example, is not standard practice, but by using contacts and networks and offering a good product, Ida Chan has managed to secure such an arrangement. Such opportunities are generated by the process of undertaking business activity and actively seeking out and creating opportunities: they cannot be identified, in advance, from research findings.

6.2.3 Achieving sustainable market access

Since there is no one distribution channel which offers a clear advantage, a pragmatic and opportunistic approach is likely to be most successful. A strategy which combined selling through tour operators and selling direct to tourists would be a sensible starting point: it would spread risk, maximise market access, and generate the most sustainable margins. A tour operator distributed product guarantees access to a substantial section of the market and would therefore stimulate word of mouth recommendation whilst establishing the product range. Selling complementary products independently would help establish product differentiation, and offers the possibility of reaching the significant market segment which does not attend welcome meetings or is flight only. Independent selling is free from many of the constraints imposed by the tour operator / ground handler framework; for example a more realistic approach to health and safety can be adopted. Crucially, selling independently produces more sustainable margins and greater potential for creating pro-poor impact because product development can be slanted to provide greater and more widely dispersed economic benefit to the informal sector (for example: using the Tourist taxis; incorporating a community donation).

To sell successfully through a tour operator, there would need to be close collaboration from the outset to ensure that the product met the tour operators' health and safety requirements and that the tour operator's ground handler would uphold the excursions' pro-poor values aims. It would also be crucial to find a way of differentiating the product.

To sell independently, successfully, would require an investment in marketing, which in turns suggests that a range of products would have to be developed to spread the cost and ensure that the excursions are profitable. As shown by Arch Tours, word of mouth recommendation is very effective, and is driven by the emotional energy generated by tourist experience of Gambian everyday life. A physical presence in an area of high tourist footfall, such as The Strip, is also important for attracting passing trade. Many tourists research The Gambia on the web before departure, which creates an opportunity to raise initial awareness of the excursions online through both a dedicated website and social media forums.

Arch Tours relies on these three channels to attract customers, and its success shows that accessing the market directly is a viable strategy in The Gambia.

The package market in The Gambia has an appetite for intimate and nuanced excursions which provide real insight into everyday life and foster a more mutually respectful interaction with local people. The current range of formal sector excursions does not satisfy this demand and many tourists remain wary of the informal sector. There is clearly a need for product innovation and an opportunity to exploit unmet demand for the benefit of local Gambians and tourists alike. The challenges are to develop products which are 'authentic' and intimate and also fun, accessible and of reliable quality; to package the products in such a way as to attract a largely passive, risk averse and cynical audience and to establish market access which can deliver sustainable returns and sufficient benefits to the suppliers. Recommendations for product development, product packaging and establishing market access are in Appendix 1. The next step is to identify the best placed agent to tackle these challenges.

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Appendicies

Appendix 1: Recommendations and next steps

Product

Product development

Epistemic value

Have a 'hook'

Design excursions around a theme such as tie and dye, a 'day in the life of a villager', or an exploration of different cultures of villages which bank the River Gambia.

The range of potential hooks is very large and includes peoples' every day productive activities, village theatre, harvesting festivals, and sports.

Keep the focus quite general to ensure broad appeal.

More specialist excursions ('a day in the life of' a particular profession for example) could be sold on an adhoc or tailored, pre-booked basis, if it is possible to supply on this flexible basis.

Incorporate experiential elements

Generating active participation will make the excursion more fun as group members try out unfamiliar activities and satisfy their curiosity through exploration. It also provides a richer experience for tourists by engaging all their senses.

Where possible, employ the principle: 'show, don't tell'. For example, demonstrate how people use objects rather than just explaining.

Create opportunities for tourists to try practical tasks or crafts such as pounding rice or weaving, and to hold and feel objects they are unfamiliar with.

Develop an authentic and accessible narrative

Excursions need to be designed as a collaboration between suppliers and an expert who understands tourist curiosity, to represent local lives in an accessible and enjoyable way.

Good quality interpretation is key and suppliers will need some training to ensure that they can interpret everyday life into an interesting and lively narrative for tourists

Attention to details such as choice of setting is important in conveying authenticity and ensuring tourists remain within their comfort zone.

Social value

Quality of interaction

Tourists value Gambian friendliness very highly and excursions should be designed to foster interaction which draws on this Gambian hospitality – a host: guest relationship

Suppliers must be willing and able to act as host, sharing elements of their lives with tourists

Suppliers must be paid a fee for delivering the experience; any sales revenue must be an 'added extra' so that pressure to buy does not commercialise the relationship

Appendicies

Excursions must be focused on features that the suppliers can interpret for tourists with pride, such as their work, culture or village and not slanted to encourage pity and charity.

Experiential activities will help to foster a more co-operative relationship between tourist and supplier and counteract the observer : observed dynamic.

Local consent

When excursions take place within a broader community setting (such as a village) it is crucial that time is taken to establish community consent for the excursion to ensure that pro-poor principles are embedded and reduce the risk of begging or other hassle.

Ensure that consent is gained from appropriate community leaders and that excursions include an element of wider community benefit

Communicate the importance and benefit of community involvement to tourists to enhance their experience and allay fears of being intrusive

Functional value

Small group size is essential. Ranging from about 12 or less depending on activity.

All elements of the excursion, particularly food, drinks and sanitary facilities must have a demonstrably acceptable level of health and safety

Excursions need to be fully insured.

A product mix which includes half day and full day excursions is most likely to be successful. Overnight excursions would not appeal to most tourists.

Emotional value

Emphasising local benefit of excursions will contribute to the positive 'feel good' value of the tour and help resolve tourist unease about poverty

Product packaging and positioning

Positioning

The excursions should be positioned as filling the space between conventional formal sector excursions and informal excursions, offering the best of both worlds:

Delivering the same functional value as formal excursions, or, in the case of group size, providing a better offer

Delivering the same authentic insight in everyday life as the informal sector, with a unique range of experiences or 'hooks', and with a higher level of assurance with regards to health and safety, reliability, and other functional items

Packaging

Minimise barriers to purchase.

Emphasise functional features of trips (especially group size and health and safety) in promotional literature and sales conversations.

The excursions need be clearly differentiated from other formal excursions to overcome tourists' preconceptions.

Communicate benefits

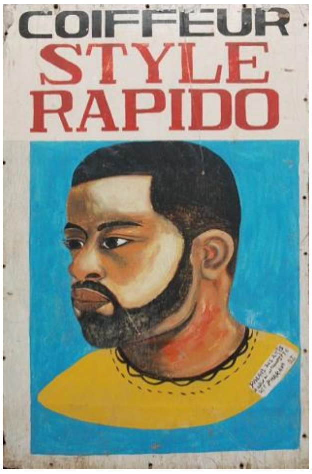
Excursions need to be branded effectively to communicate unique features such as local benefit and authenticity.

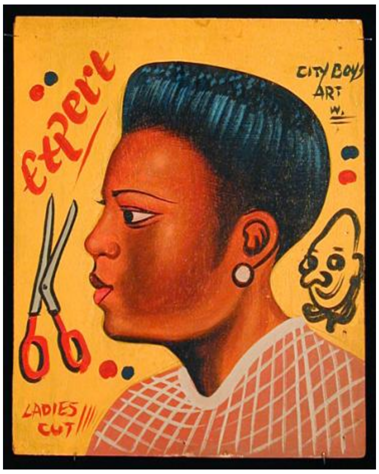
Positive interaction with hosts is important to tourists but cannot be the core offer: 'positive interaction' is not an easy sell. However, it can be implied through language (using words such as host) or through testimonials. Social media can also be useful for this type of testimonial.

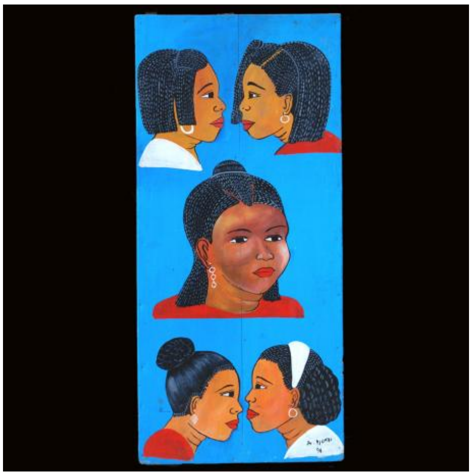
Where possible, all claims should be substantiated: for example, evidence of local benefit

The key marketing messages need to convey an authentic and fun experience, the positive contribution to local livelihoods, and the trustworthiness of the excursion providers.

Branding needs to reinforce these messages by developing a brand identity of a friendly, fun and authentic Gambian voice, provided by a professional and reputable organisation. For example, the styles used in hand painted signs, common in The Gambia, could convey fun and authenticity.







Distribution channels

The most important factor in gaining market access for the excursions is employing a focused and entrepreneurial approach to creating and seizing opportunities.

Below is one possible strategy, but it is indicative of the type of approach recommended rather than a plan for implementation; creating and securing market access successfully is likely to be more opportunistic .

Possible strategy for achieving market access

Employ a two pronged approach:

- Develop a flagship product in conjunction with a tour operator and sell as part of their formal excursion offer.
- Develop a range of complimentary products and sell these direct to tourists, utilising a range of strategies.

Appendicies

Selling through a tour operator

Tour operator involvement will be important from the outset to ensure that the excursion meets health and safety requirements, and that the ground handler supports the pro-poor values.

The flagship product should be one which will have broad appeal, and can run with slightly larger group size (such as 12) . A logistically complex excursion such as boat trip, for which tourist might need extra reassurance about health and safety standards, would be a sensible choice, for example The Ninkinanke excursion.

It will be challenging to sell the unique benefits of the excursion through the booking sheet, and the welcome meeting. One solution would be to highlight the excursion as a special new product developed with local partners.

Selling independently

Promotional strategies

- **Word of mouth:** Harness the tourists' positive emotions after the excursion to generate word of mouth recommendation. This can be stimulated by techniques such as asking tourists directly to promote the excursions and providing them with tools such as promotional leaflets. Including a souvenir as part of the excursion can be an unexpected pleasant surprise and act as a trigger back at the hotel for tourists to share their experiences.

- **A physical presence** in an area of high tourist footfall, probably The Strip, is essential. A stall, well presented and decorated, would be adequate if premises are unobtainable.

- **Leaflet distribution**: the possibility of distributing leaflets through restaurants, cyber cafes and other premises which cater for tourists but do not have a business relationship with tour operators should be explored.

- **Website**: there is an opportunity to create a site that that is authoritative voice on the web of Gambian cultural heritage, and 'things to do' with a cultural theme. In addition to the excursion offers, the website could provide information on aspects of Gambian life, recommendations of places to visit or food to try, and a calendar of up and coming events. To be effective, the website would need to be professional managed, content kept current and resources invested in search engine optimisation.

- **Social media**: encouraging tourists to mention excursions in hotel reviews and write favourable comments in the forum sections of travel review sites provides valuable free publicity and word of mouth recommendations. Tourists who have enjoyed the excursions will act as loyal and vocal advocates, and just a few such tourists can substantially raise online profile. Many tourists had visited Trip Advisor pre-departure, so this approach is likely to be a cost effective way of raising awareness of the offer pre-departure.

Next steps

Appendicies

The next step is to determine the best agent to develop and promote excursions.

The range of options includes:

- Ground handlers have the licence to operate, and the expertise and resources to bring excursions to market. However, as profit driven enterprises which need to minimise costs in a competitive environment, ground handlers may struggle to embed the pro-poor aims and stay true to the social aims.

- ASSET is the offers the best link between the informal and informal sector. However, as a trade body, it is member led and supplier facing, rather than demand led and customer facing. The breadth of its remit also militates against the tight focus required to develop and promote the excursions.

- A dedicated social enterprise, established with clear social goals and a sole focus on excursion development, marketing and ensuring service standards, could offer the best delivery solution. Working in partnership with ASSET, or sub-contracting as appropriate, the enterprise could benefit from ASSET's expertise but maintain the entrepreneurial drive and commercial focus required to succeed in a competitive and challenging market.

  The enterprise could employ a similar strategy to ASSET: working with a group of (vetted) tourist taxis to provide local excursions, and in partnership with a sympathetic ground handler for excursions which are more complex to supply. Clearly, if the enterprise does not have a licence to operate as a ground handler, care would need to be exercised to ensure local trips are not packaged as excursions, in the legal sense.

  Introducing a new organisation into a supply chain where margins are already slim and competition fierce would be challenging. The next step would be to develop a business plan with financial forecasts, based on clearly articulated assumptions, to test out whether such an enterprise would be viable and sustainable.

Appendix 3: Ground handler licensing requirements

Gambia Tourism Authority

2008/2009 Requirements for Operational Licence for Ground Operators

(NEW BUSINESSES)

1) Business Registration - Attorney General's Chambers
2) Tin Certificate - Gambia Revenue Authority
3) Social Security Certificate - Social Security & Housing
4) Expatriate Quota(including Foreign Tours Operators) – Gambia Revenue Authority
5) Staff Health Screening Certificate (if applicable)- Dept. of Health, Banjul
6) Fresh Food Certificate (if applicable) - Dept. of Health, Banjul
7) Public liability Insurance - Recognized Insurance Company
8) Evidence of Contract with a recognized Tour Operator,
9) Evidence of a suitable Office equipped with Tel, fax, and mailing address, and a Car Park is a must.
10) Capital Structures of the Company and Sources of finance etc. Bank Reference (For New Businesses)
11) Road worthiness certificates of the vehicles - MSA / Police/ Corr Enterprise.
12) Description of Excursions,
13) A Number of nine (9) vehicles in the form of:
- **a. two (2) Coaches, (minimum: 40 seats each)**
- **b. three (3) minibuses (minimum: 14 seats each)**
- **c. four (4) Trucks/Land rovers**

14) GTA inspection of Vehicles & Facilities - Gambia Tourism Authority
15) GTA Licence Application Form - Gambia Tourism Authority
16)GTA Licence Fees - Gambia Tourism Authority

(RENEWAL)

1) Business Registration - Attorney General's Chambers
2) Expatriate Quota(including Foreign Tours Operators) - Gambia Revenue Authority
3) Public liability Insurance - Recognized Insurance Company
4) Road worthiness certificates of the vehicles - MSA / Police/Corr Enterprise.
5) GTA inspection of Vehicles & Facilities - Gambia Tourism Authority
6) GTA Licence Application Form - Gambia Tourism Authority
7) GTA Licence Fees - Gambia Tourism Authority

(source: GTA website: http://www.visitthegambia.gm/images/stories/downloads/2009_operatorrequirements_2.pdf)

Highlighting – author's own. Note that the requirement of a contract with a recognised Tour Operator presents something of a circular problem since gaining a contract with a recognised tour operator would usually require having a licence to operate. The vehicle requirements are also unjustifiably extensive.

Appendix 4: Topic guide

Tourist interview topic guide

Introduction

Introduction of researcher and research, and consent form.
Name, occupation, age.
Length of holiday, and number of days left. Other members of travelling party. Tour operator.
Previous visits

Briefly explore motivations

First timers: why did you choose the Gambia? Is it meeting those expectations?
Repeat visitors: why did you decide to come back?

Experience of excursions

Previous trips:
Previous excursions. If several – most / least enjoyable and reasons why.
Details of trip, whether TO, local guide or other. Booking details.
Factors influencing choice of trip. Prompts: Tour rep, word of mouth, guide book, websites, interests / concerns, cost

What they thought the trip would be like, and if met expectations. What they enjoyed / not enjoyed about it. Probe what specifically they liked / disliked about these elements. What might increase the positives / mitigate the negatives

No trips yet undertaken:
Trips they are planning / considering.
Factors influencing choice. Prompts: Tour rep, word of mouth, guide book, websites, interests / concerns, cost

Proposed excursions

Description of key features of cultural excursions & description of 3 specific examples. Reassurance that honest answers more valuable than polite but insincere responses.

Would they book a trip like this? Why?
Price perception
Elements of an 'ideal' trip.

Explore feelings and perceptions of The Gambia

If they were telling a friend about the highlights of their holiday what would they say?
How would they describe Gambia, as a country, to a friend?
Aspects of The Gambia which they are curious about.

Appendix 5 – Matrix

Appendix 6: Booking form

When was the last time you did something for the first time?

Name:

Event Planner - The Gambia

Hotel: Room:

Day	Event		Adult Cost	Adult	Child	Day	WK1	WK2
Sunday / Wednesday	Lazy Day	Meander through the mangroves, slip down a gear & chill out and relax..... You're on holiday! Buffet lunch, afternoon tea & a glass of champagne are included. A great way to top up your tan, swim and admire the view sailing through the backwaters !	£42.00					
Monday	Roots River Cruise	Sail back through the mists of time to the days of the slave trade and walk in the footsteps of the famous author Alex Haley as he traced his ROOTS. Meet the Chief of the village and also a descendant of Kuntah Kinteh before heading by wooden canoe to the ruins of Fort James Island where the slaves were imprisoned..... Enjoy a delicious buffet lunch on board and hopefully see the dolphins that often play at the side of the boat!!!	£55.00					
Tuesday and Friday	South Gambia Truck Adventure	Swiss army trucks sweep you through the bush and country and along to Paradise Beach to see the Gambia how it really is, in the heart of the rural areas. Your chance to see one of the local schools and see the smiling faces as the children learn their abc! Roads give way to dirt tracks and the pace of life slows down..... Meet "Uncle John" and sample his palm wine and also a visit to the local distillery to sample their delicious liqueurs! Buffet lunch is included and there is also time to relax and swim at the beach. Most popular event!	£43.00					
Thursday	Gambian Sights & Sounds	Enjoy a visit to the capital of the Gambia Banjul, haggle for bargains at the local batik factory. Head off to enjoy lunch overlooking the sea. A great introductory half day tour of the local area!	£29.00					
Thursday	Bush Wackers (Gambian Night Out)*	Join your Thomas Cook team for a unique night in The Gambia. Bushwackers night will show you the hidden secrets of Gambia nightlife and show you around some of the best bars, give you a free shot in every one and allow us to entertain you. Whether you are 18 to 80 this will be guaranteed to be the best night of your holiday.	£10.00					
Friday	Makasutu By Day	Visit Makasutu cultural forest. Makasutu is a palm forest situated on the banks of the beautiful meandering tributary of the River Gambia. You will take a walk to the wildlife museum which will also expalin what they are trying to do for the wildlife of Gambia. During the day there are many activities on offer, river trips on traditiona dug out canoes and guided walks. Lunch is included during this day.	£45.00					
Wednesday	Senegal One Day	Unmissable opportunity to experience another African country and get that all important stamp in your passport. Cross the Gambia river on the local ferry for a journey full of local colour. On arrival at the other side a short drive brings you across the border into Senegal. Head off to the hotel 'Les Paletuviers' in Toubacouta and have lunch and spend a short time relaxing by the pool. You will visit Sippo Island, here you will have the chance to see the queen of the island. You will travel to the island on a gentle cruise through the mangroves. Senegal is a must see whilst your on holiday in The Gambia.	£66.00					
Friday	Creek Fishing	For those of you that have never mastered the thrill of catching a fish or for those who have mastered the art, this is a truly unique day out down Oyster Creek!	£36.00					
Saturday	Gambian Home Cooking	Home Cooking will give you the opportunity to spend the day in true Gambian style. Head to the local market in traditional dress to collect local produce for your home cooking experience. Eat your traditional meal with the family before seeing the fortune teller.	£30.00					
Tuesday	Gambian Highlights	A great way to experience all that The Gambia has to offer visit a local school, a local tie / dye "factory", head into the capital Banjul to visit the market & then enjoy lunch on the river & to finish the day visit the Gambia is Good farm run through the Travel Foundation.	£56.00					
Depts	1st Class Lounge (Mon, Tue, Wed, Sat Only)	Why not start your homeward journey in comfort and style - drinks, comfy seating and an air conditioned departure lounge. Places are strictly limited and are on a first come first served basis so please book early to avoid disappointment.	£15.00					
Important Information		* Thomas Cook Holiday Highlights	Total					

Gambia Tours organise and operate the excursions shown. On their excursions you will have English speaking guides with convenient pick up points at your hotel. Payment can be made with Sterling, Euros, Visa, MasterCard or Travellers cheques. Children under 2 years are free and aged 2 - 12 years are 50%. Our events have many bonuses that we have included in the basic price (including 15% sales tax) which means that you cannot compare the value of our events elsewhere! Contact details: Gambia Tours, The Gambia. Tel: 4464757 Thomas Cook act only as the agent on behalf of the excursion provider. Your contract with the excursion provider will be subject to local laws and the excursion provided booking conditions. Bookings will not form part of your holiday package. No shows will not be refunded.

Form of payment

Appendix 7: Tourist responses to proposed excursions

Tie and Dye

The tie and dye excursions was most the popular. The half day was seen as a good length of time and tourists liked the idea of ending up with souvenir. However some tourists were not interested in Tie and Dye as an activity and were not attracted to the excursion.

'Day in the life of'

'Day in life of' divided tourists: some thought it would be boring or too 'educational' for a holiday. Others were really keen. Two doctors interviewed had sought to visit the mental health hospital, one successfully. However, interest did often hinge on which professions or activities were available. The more accessible focuses such as 'teacher' or 'villager' had the broadest appeal. Many tourists wanted to see their own profession in action and sometimes defined this narrowly – for example a nursery teacher who only wanted to see pre-school teaching. This narrow professional interest often split couples (for example, a nurse and a builder who were interested in their own professions but not each others). Some groups were happy to accommodate each other by spending a day apart.

Ninkinanka

Ninkinanka trail sparked interest. Tourists were attracted by the combination of a river trip and seeing rural villages. Some considered it to be similar to the Roots excursion but better because of the smaller groups and being less 'commercial'. A couple of interviewees also liked the idea of visiting villages with different cultures. Very few tourists engaged with the idea of the myth and it is likely that whilst the story telling element of the trip would enhance tourist experience, it would not be a selling point. Most tourists did not want the trip to include an overnight stay: many feared contracting an illness, especially malaria or yellow fever, or jeopardising the rest of their holiday by contracting a tummy bug from poor hygiene. Tourists were also concerned about levels of comfort and did not want to relinquish the standards of their hotel.

Beekeepers

The visit to the Beekeepers was unpopular and reactions ranged from bafflement to fear.

Home Cooking

Few tourists were aware of the Home Cooking excursion even though many had come with one of the two tour operators who had it on their 'list'. Overall it was less popular than the other excursions (excluding the Beekeepers). Some tourists were clearly enthusiastic and would book it but many disliked the idea, often because they felt that cooking was something they wanted a break from (especially women interviewees). Others worried that the experience would feel false and a number did not like the idea of dressing up in African clothes.