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Improving Access for the Informal Sector to Tourism in The Gambia

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Acronyms

ABTA	Association of British Travel Agents
AITO	Association of Independent Tour Operators
ASSET	Association of Small Scale Enterprises in Tourism
DFID	Department for International Development
EU	European Union
FTO	Federation of Tour Operators
GBP	Great Britain Pounds
GDP	Gross Domestic Product
GHA	Gambia Hotel Association
GHEHA	Ground Handlers and Equipment Hirers Association
GNP	Gross National Product
GTA	Gambia Tourism Authority
IMF	International Monetary Fund
NRI	Natural Resources Institute
PPT	Pro-Poor Tourism
PRSP	Poverty Reduction Strategy Paper
SMME	Small, Medium and Micro Enterprises
STI	Sustainable Tourism Initiatives
TCF	Tourism Challenge Fund
TDA	Tourism Development Area
TUI	Touristik Union International
USD	US Dollars
WTO	World Tourism Organisation

1. Introduction

The Gambia is a poor developing country that has become a popular winter sun destination, particularly for UK tourists. As in many other enclave-type destinations, tourism has developed in ways that provide few opportunities for poor people and the informal sector to participate. Traditionally the formal sector[1] provides the accommodation and transport in which tourists spend most of their time. In the past, the most visible roles taken up by the poor were as hawkers, clustering around coaches trying to sell their goods and, beach 'bumsters'[2] seeking to befriend tourists as guides.

However in The Gambia an innovative approach has been taken to addressing this situation through a Tourism Challenge Fund (TCF) funded project. A number of objectives and activities were established to make tourism more 'pro-poor' and specifically to increase access of the informal sector[3] to market opportunities in tourism. Since the start of this initiative three years ago, there are several very practical steps that have been implemented, progress and challenges to report on, tangible impacts to document, and a range of lessons learned useful to others.

Experience in The Gambia since 2000 is therefore an invaluable case study of how pro-poor tourism issues can be tackled in practice. In particular, the approach focuses on the use of a multi-stakeholder strategy for addressing problems and implementing solutions. It demonstrates what can be achieved by partnership approaches between the formal and informal sectors, including licensed and unlicensed guides, 'bumsters', fruit and juice sellers, craft market stallholders, the taxi drivers, ground handlers, hoteliers, UK tour operators and their representatives in the resort. Actions that have proved effective include badging, licensing, marketing and advertising of poor producers' products in hotels, and codes created and policed by the informal sector.

The initiatives described here were catalysed by a project of the University of Greenwich, funded by the UK Department for International Development, and implemented through a Project Steering Group in The Gambia comprising government, the formal sector (ground handlers and hoteliers) and the informal sector represented through the Association of Small Scale Enterprises in Tourism (ASSET) (see Section 4 for further project details). It focused on a number of key challenges that were identified by stakeholders at a workshop in October 1999.

These were:

1. How can the **conflict of interests** between the market-led, enclave character of the industry and the demand for access and participation by the formal sector, the informal sector and other non-tourism sectors of the economy be resolved to benefit all parties?
2. How can the **informal sector better access** tour operators, ground handlers and hoteliers that purchase tourism services and products?
3. How can the **informal sector improve its access to tourists** and increase the volume and value of its sales in order to increase revenues?
4. How can **supply side linkages be improved** so that, for example, more of the food and furnishings purchased by the industry can be locally sourced?
5. What **opportunities** are available for development or extension of tourism products and services on which the informal sector could capitalise and/or gain entry to the tourism market?

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[1] The formal sector comprises: hotels, ground handlers and tour operators. For a full definition of the formal sector see paragraph 3.2

[2] 'Bumsters' are predominantly young men who earn a living by accosting and attempting to befriend tourists in the streets and on the beach.

[3] The informal sector comprises: fruit pressers, fruit vendors, taxi drivers, guides, craft workers, market vendors and 'bumster'. For a full definition of the formal sector see paragraph 3.1

6. What **training/licensing requirements** need to be implemented to provide opportunities for poor producers and confidence for tour operators to contract?

These questions were formulated specifically in response to the situation of the informal sector around beach tourism in The Gambia. Nevertheless, they are generally applicable to problems that arise in securing access for the informal sector to the tourism market when the product and destination is controlled by the formal sector.

This paper first provides a brief overview for tourism in the Gambia. Section 3 then describes the project and its stakeholders, while Section 4 gives a detailed description of the two phases of the project, namely consensus building (phase 1), and implementation and testing (phase 2) used to achieve these objectives. Section 5 summarises the results of the surveys undertaken during phase 1 and 2, and Section 6 outlines the steps taken by the informal sector in order to improve their access to the tourists. Section 7 gives a detailed description of the specific initiatives undertaken by the different informal sector's groups in order to increase their linkages with the tourism industry.
Section 8 summarises the main lessons learnt and makes suggestions on how these can be applied in other countries.

The project's aims were to:

- increase sustainable employment opportunities and earnings for the informal sector in The Gambia by improving access for the informal sector to the tourism industry and to tourists.
- identify and disseminate Best Practice for implementation through the Federation of Tour Operators (FTO), the Association of British Travel Agents (ABTA) and the Association of Independent Tour Operators (AITO).

And its specific objectives were to:

- increase revenues and employment by integrating the informal sector into the formal tourism industry.
- remove barriers to entry by the informal sector into the tourism industry through collaboration with local private sector Small, Medium and Micro Enterprises (SMME) and business organisations.
- create additional local employment (targeted directly for the poor, women and youth) which could support opportunities for diversifying livelihoods in rural areas and which can improve supply-side linkages.
- enlist the support and participation of UK tour operators, through a UK Industry Group, in assisting the formal and informal sector in The Gambia to shape, extend and develop tourism products and services that benefit Gambians directly and that the operators can market to their European customers.
- strengthen business organisations (including the informal sector) and their relationships with government in The Gambia to enable cross sector tourism development that directly benefits local communities.
- develop approaches (including partnerships, training, quality enhancement, marketing and insurance initiatives) that are pro-poor and transferable to other destinations (through FTO, ABTA and AITO).

2. Tourism in The Gambia

The Republic of The Gambia, on the west coast of Africa, is the smallest country on the African continent and ranks 160th out of 173 countries on the United Nations Human Development Index[4]. According to AFRODAD 53.7% of the population lives on less than US$1 per day and 84% live on less than US$2 per day.[5] The Gambia is one of the 48 Least Developed Countries, with a GNP per capita in 1998 of US$340, and with 53.7% of the population reckoned to be living on less than US$1 per day. The Gambia has a population of 1.3 million. The Gambia has a rich cultural diversity with some ten different ethnic groups including the Mandinka (42% of the population), Fula (18%), Wolof (16%), Jola (10%), and Serahuli (9%).

At independence in 1965, The Gambia was dependent on the production and export of groundnuts, a sector which has subsequently declined in relative importance as tourism has grown in significance. By 1992, only 45% of The Gambia's export earnings came from groundnuts, and only 48% of its export income came from primary production. Subsistence agriculture is the largest employer in the economy – with an estimated 75% of the adult population engaged in farming. Groundnut production now accounts for some 10% of GDP. Groundnut production and tourism are the main foreign exchange earners outside the re-exports sector (US Department of State 2002). 'The Gambia is a regional trading post, supplying re-exported foreign goods to neighbouring countries – Senegal, Mali, Guinea and Sierra Leone. Re-export activities currently account for 30% of GDP and generate over 50% of The Gambia's foreign exchange earnings. Most of the re-exports trade is in the informal sector.' (US Department of State 2002)

Tourism is critical to the economy. The tourism industry is estimated to account for around 7.8% of Gambian GDP (WTO 2001) and to employ 5,000 nationals (and to account for a further 6,000 indirect jobs). The International Monetary Fund's (IMF) assessment is that:

> *'Although vulnerable to external shocks, tourism is a dynamic sector in the economy, with considerable potential for further growth and employment creation. The government assigns high importance to the creation of a conducive environment for private sector investment. In addition, the government will continue to allocate budgetary resources, along with increasing private sector contributions, to the marketing of The Gambia as a tourist destination; to improve the incentive system to encourage private hotels and restaurants to enhance the quality of services; and to review the use of the tourism development area so as to allow the construction of new hotels and conference facilities. The government will also assign high priority to improving the sanitation infrastructure in the greater Banjul area, and to developing human resources'.* (IMF 1999)

Tourism started in The Gambia in the 1960s when cruise boats began to call in to Banjul. In 1965 the Swedish company Vingressor/Club 33 began to bring package holidaymakers, their numbers grew slowly and in 1970 the Tourism Development Area (TDA) was established, covering the 1,000 metres inland from the beach between Kololi and Kartong. The tourism product which has been developed in The Gambia has been primarily winter sun, a few operators have sought to develop a all-year round programme, with the Gambia Experience being the only company to have persevered and to have been successful. There are opportunities for the development of new products in The Gambia, most notably the development of river boating trips, but this will require a

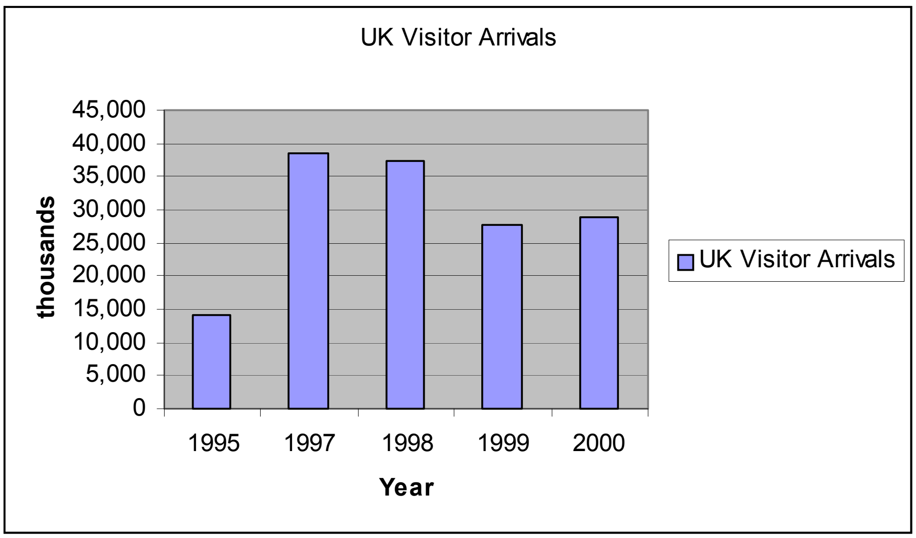
[4] UNDP (2002) Human Development Indicators, UNDP http://hdr.undp.org/reports/global/2002/en/indicator/indicator.cfm?File=cty_f_GMB.html

[5] African Forum and Network on Debt and Development (AFRODAD) http://www.afrodad.org/html/Debt/gambia.htm

co-ordinated national effort. Bird watching for the European market, and cultural roots programmes for the US market demonstrate that there is scope for the development of special interest programmes, which would enable The Gambia to differentiate its product from that of other sun, sand and sea destinations.

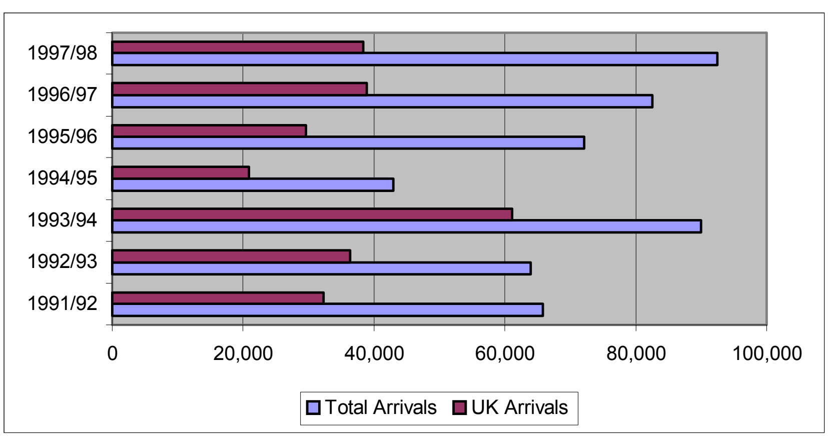
The Gambia is very dependent on tourism from just three European originating markets. In 1998 the UK (41.1%), Germany (24.4%) and Holland (11.8%) accounted for 77.3% of non-African international arrivals. The UK market has grown from just over 14,000 arrivals in 1995 to nearly 29,000 in 2000. However, UK arrivals peaked at just over 38,000 in 1997 and have not yet recovered those levels. As the destination is almost entirely dependent on the charter flights of the major tour operators, decision making about capacity is in the hands of the UK based tour operators and their judgment about how many holidays to The Gambia they can sell in any particular year.

Figure 1: UK visitor arrivals to The Gambia 1995–2000



Source: Central Statistics Department (unpublished)

Figure 2: UK arrivals as proportion of all international arrivals



Source: Central Statistics Department (unpublished)

The Gambia is very vulnerable to any downturn in the demand for sun, sand and sea tourism in its originating markets and this form of tourism is highly competitive, with new beach tourism and winter sun destinations being developed, many of them like The Gambia only 5 to 6 hours by air from the airports of northern Europe. Tourism in The Gambia is highly seasonal, with most of the originating market tour operators only operating from November to April. From the UK, Gambia Experience is the only major all year operator and its charters constitute the 'scheduled' service between London and Banjul.

In 1999 international tourism was estimated to have grown by 34% but the slow tourism recovery in 2000 reflected concerns arising from civil disturbances during the period through April 2000 (IMF 2000). The tourism industry in The Gambia has been vulnerable to perceived internal instability and insecurity. Negative travel advisories by key tourist-source countries, particularly the UK, caused receipts from tourism to drop by 60% in 1994/5 over the previous season, following the coup. There were just short of 90,000 international arrivals in 1993/4 and not until the 1997/8 season did visitor arrivals recover this peak, reaching 92,414. The record earnings level of 1993/4 was only slightly surpassed in 1997/8.

Tourism is identified as a significant sector in the Gambian Poverty Reduction Strategy Paper (PRSP) particularly as a source of foreign exchange earnings; inward investment in tourism was identified as a potential significant contributor to employment in the recent PRSP (World Bank 2002). The Ministry of Tourism and Culture's 'National Policy for Tourism Development' (Ministry of Tourism and Culture,1995a) recognised that The Gambia was achieving low occupancy rates from tour operators offering packages to The Gambia and that tourists were not spending very much in the local economy. However, unlike the 2002 PRSP, the Ministry of Tourism and Culture's 1995 policy paper recognised that by 'opening up avenues for unskilled, artisanal and middle-level employment involving 10% of the labour force, the tourism sector [had] facilitated the amelioration of the earnings capacities and by extension, the style of life of an appreciable number of households in peri-urban centres, adjacent to the Tourism Development Area.' The Ministry argued that, if the industry diversified, operated throughout the year, and spread into rural areas, employment and earnings from tourism could be significantly higher. They pointed to the problems of foreign exchange leakages and the neglect of 'local producers and enterprises'. They argued that the linkages with agriculture, horticulture, fishers and livestock needed to be improved (Ministry of Tourism and Culture 1995a). The National Action Plan (Ministry of Tourism and Culture 1995b) envisaged diversifying the industry and launching cultural, inland and eco-tourism products. In addition to qualitative changes, they planned for 150,000 international arrivals in 2000.

The government's policy is to promote tourism and its contribution to economic growth. The government is continuing its efforts to broaden the tourism market, improve quality standards in hotels and restaurants, and ensure rational use of the tourism development area. Since November 1st 2002 the Gambian Tourism Authority has levied a 'tourist tax' amounting to 5GBP on all tourists arriving in The Gambia and the monies raised will be used to improve the environment and facilities for tourism. The African Development Bank is financing a new Tourism Master Plan for The Gambia – this is expected to commence in 2003.

3. A Pro-Poor Project and its Stakeholders

3.1 The Project

The UK Government's Department for International Development (DFID) funded, through its Tourism Challenge Fund (TCF), an initiative to improve the linkages between the informal sector and the formal sector. This 20 month project ran from August 2000 to March 2002 and worked with the Association of Small Scale Enterprises in Tourism (ASSET) on a series of participative surveys to collect information about the perceptions of the tourists, tour operators, hoteliers and inbound operators (or ground handlers). Each of the informal sector groups participated in the research phase and identified what they saw as the significant barriers to their participation in the industry and reported on their sales during the peak season (the first quarter) of 2001.

An agenda for action was identified for each informal sector group, based on their understanding of the barriers that needed to be overcome in order that they could increase their sales and income. Discussions were held with government and the formal sector about what they could contribute to improving market access and the performance of the informal sector composed largely of poor producers.

3.2 The Informal Sector, ASSET[6]

By informal sector is meant all those individuals and micro enterprises, which engage with tourists and the tourism industry, but are not members of the Gambian Hotel Association or the Ground Handlers and Equipment Hirers Association. The Association of Small Scale Enterprises in Tourism (ASSET), resulted from a previous British High Commission sponsored Gambian Tourism Concern Workshop on Private Small Scale and Community-Based Tourism Enterprises held in The Gambia in October 1999. It was established in April 2000, bringing together some 40 small and micro enterprises. These include craft market vendors, tourist taxi drivers, official tourist guides, juice pressers and fruit sellers as well as a number of small hotels, guest houses and ground tour operators. The main objective of ASSET is to enable small-scale tourism enterprises to benefit more from their participation in the tourism industry and it works with its members on product development, marketing training, access to finance and quality assurance, and represents its members' interests to government and the formal sector. It functions as a trade association for the SMMEs in the informal sector.

3.3 The Formal Sector

The formal sector in The Gambia is composed of the hotels represented by the Gambia Hotel Association (GHA) and the Ground Handlers and Equipment Hirers Association (GHEHA), which is composed of the inbound tour operators who have contracts with the originating market operators who constitute the third group within the formal sector. The UK operators, which send tourists to The Gambia, include The Gambia Experience (operating year round with a substantial charter programme), TUI/Thomson, First Choice, Thomas Cook, Panorama, Odyssey and My Travel.

[6] For more information about ASSET, visit their website at: www.asset-gambia.com

3.4 The Gambia Tourism Authority

The formation of the private sector-led Gambia Tourism Authority (GTA) was authorised by an Act of Parliament in July, 2001, as a public enterprise to develop, regulate and promote the tourism industry in The Gambia. The GTA became operational in November 2001. Its primary function is marketing and promotion, part of its function is to create a Hotel Classification Programme and a new Tourism Security Unit initially covering the hotel areas and neighbouring places of tourism interest, followed by an extension of the service to give nation wide coverage. Its objectives are to:

- boost visitor arrivals to The Gambia;
- institute and maintain quality standards in all aspects of the tourism industry;
- promote local and foreign investment in the tourism industry;
- develop the human resource capacity of the tourism industry.

In April 2002 a final meeting of the Tourism Challenge Fund Project Steering Group was convened to which the new GTA and representatives of the overseas tour operators were invited along with GHA, GHEHA, ASSET, the government represented by GTA and four representatives of the foreign tour operators.

The group decided to continue the work started during the DFID project and to form a Responsible Tourism Partnership under the auspices of GTA. Its aims are to continue to develop the relationship between the formal and informal sectors in order to continue to resolve conflicts and define operational relationships; to look at issues of responsibility and the sustainability of the tourism industry; and to consult, review, implement (where given the mandate to do so) and generally help the GTA in its drive to regulate and improve the tourism industry.

The creation of the Responsible Tourism Partnership within the GTA was designed to ensure that the collaborative style of work established in the TCF project would be continued as a partnership between the government, the private sector and the emerging informal sector now represented through ASSET.

4. The Process

One of the major issues in 2000, preventing positive dialogue and change, was the conflict and distrust between the different sectors of the tourism industry. The formal and informal sectors blamed each other for the poor performance of the industry, and so did informal sector groups among themselves. The down turn in visitor arrivals in the first quarter of 2000 increased the levels of conflict as each group came under pressure. In the initial stage of the TCF project, each of the individual groups was encouraged to talk openly about their problems and to evolve and agree sets of practical initiatives that could be taken to improve their market position. There was so much disagreement about the issues associated with sustainable tourism in The Gambia, that it was necessary to identify what the actual situation was for each sector of the industry through an extended process of stakeholder consultation. This was backed by survey research of the earnings of the informal sector and the barriers which they encountered on the supply side. In order to understand the demand side, a survey of tourists was undertaken and the views of the formal sector about the services were solicited.

A series of workshops was held, involving each of the informal sector groups individually, the informal sector as a whole, and then the informal and formal sectors together. An agenda for action was agreed. The consultation and workshopping process was essential in order to build a shared understanding of the challenges faced by The Gambia, and to build support for a shared vision and an agreed programme of action to achieve it. One of the most important pieces of learning in this process was that The Gambia faces intense competition from other sun, sand and sea destinations and the Gambians in the industry need to work together to attract tourists there – rather than competing with each other.

4.1 Methodology

The process was applied using established multi-stakeholder methodologies, which are not described in detail here. A wide range of methodologies was used in each stage of the process for information gathering, sharing and consensus building both about the definition of the problems and the way in which they could and should be addressed. The information gathering, or research phase, was essential to developing a factually based shared understanding of the issues that needed to be addressed by each of the stakeholders and by the stakeholders collectively. Only on the basis of this shared information could a viable implementation plan be established.

The methodologies used included stakeholder identification; market research surveys of tourists; semi-structured interview surveys of operators in the destination and the originating market and with the ground handlers and hoteliers; focus group discussions with each of the informal sector groups; and surveys of earnings and opinion amongst informal sector groups.

At the end of this information gathering phase a report was made verbally to each group about the results which affected them and small workshops were run with each group to enable them to understand the attitudes of other stakeholder groups to them and to evolve a response to be presented at the first of the plenary workshops where informal sector groups discussed the implications of the results for them, the basis of the conflicts between the informal sector groups and between the informal and formal sector groups. The results of this process were publicly recorded in a PowerPoint format. The second plenary workshop involved the informal sector stakeholder groups in reporting back their plans and requests to the formal sector representatives from the ground handlers, hotels and government. This process of open public debate chaired by an external facilitator was again publicly recorded in a further set of PowerPoint presentations which formed the basis of the work plan for the implementation phase agreed by the project steering group and subsequently implemented using appreciative enquiry methods, training workshops and the agreement of codes of conduct and enforcement mechanisms.

Open debate based on factual and transparently shared information laid the basis for determining solutions and the public agreement to processes of change. A further round of research was conducted to identify the results of the process with the four informal sector groups to determine changes in income among the target groups.

A thorough understanding of the methods of multi-stakeholder processes and the skills to use them are essential to the effective use of these approaches. There are often high levels of conflict around these issues and much is at stake for the groups involved – poorly designed and implemented processes can cause more harm than good. It is important to recognise that often the only people being paid to be present are the government representatives and consultants – the opportunity costs for participation by the private and informal sectors are high. These costs should be recognised and their time should not be squandered.

Weekly income surveys were carried out in both 2001 and 2002. Stalls were asked about their income and costs at the end of each of 8 weeks in January and February in 2001 and 5 weeks in February and March in 2002. Both surveys took place in the peak season and cannot be extrapolated to cover the year as a whole. The same methodology and questions were used for both surveys and the results are broadly comparable, the results are reported in chapter 5 below.

4.2 Phase 1: Building Consensus

In Phase 1 (August 2000 to May 2001) the main emphasis was on clarifying the issues and problems which needed to be addressed in order to improve the situation of the informal sector in The Gambia, and to develop a consensus about what could and should be done. At a series of open workshops in May 2001 a consensus was developed about what needed to be done in order to improve tourism in The Gambia and to improve the involvement of the informal sector in the industry. At the May workshops a work programme was agreed in an open session with participation by the formal and informal sectors. This was formally agreed by the project Steering Group, and has subsequently been implemented.

As part of the consensus building process, key staff from tour operators based in the UK and in The Gambia were interviewed about their perceptions of the difficulties confronting tourism in and in particular about the strengths and weaknesses of the informal sector. Similar interviews were conducted with ground handlers, formal sector trade associations and with government. The earnings and the products of the informal sector groups in both the Senegambia and Kotu beach areas – the two main tourist centres – were surveyed. A representative sample of tourists was surveyed in order to determine the critical consumer perception of the product, and in particular of the importance of the informal sector to the holiday experience.

Results of the research were reported providing the opportunity to discuss the implications of the survey for each group. Each informal sector group was able to explore the views of their sector as expressed by other informal groups, the formal sector and tourists. Each informal sector group was invited to come along to the informal sector workshop prepared to discuss what their group could contribute to the necessary process of change and what they felt they needed from the others and from the formal sector.

It was essential to achieve consensus about the changes that needed to be made in order to maximise the impact of the project and to achieve pro-poor growth. It was clear from the outset that there was little agreement about what the major problems were, in any detailed sense, and that survey information presented objectively and openly debated was important to the process of moving forward. Dialogue between the informal and formal sector and a shared perception of the problems confronting tourism to The Gambia was identified as essential to securing multi-stakeholder participation in change. Dialogue and open reporting assists in overcoming suspicions about what the formal sector is saying about the informal sector in, for example, the Welcome Meetings[7]. The content and attitudes to the informal sector at the Welcome Meetings is a key issue as is addressing the issues of hassling and bargaining.

Box 1: Lessons learned and consensus building

- Dialogue between the informal and formal sector and a shared perception of the problems confronting tourism to The Gambia were essential to securing multi-stakeholder participation in change.
- Dialogue and open reporting assists in overcoming suspicions about what the formal sector is saying about the informal sector in, for example, the Welcome Meetings. The content and attitudes to the informal sector at the Welcome Meetings was identified as a key issue as are the issues of hassling and bargaining. The 'bumsters' are a particular issue in The Gambia.
- Licensing, regulation, badging (and where necessary insurance) supported by training are important mechanisms for legitimating the informal sector.
- For the dialogue process to work within the formal sector and between the informal sector and the formal sector it is beneficial to have an organisation which is recognised as speaking with some authority on behalf of the informal sector. ASSET played a key role in establishing co-operative working relationships between different informal sector groups and in assisting them to develop codes of conduct for their own members. ASSET established a conflict resolution group and a new products group.
- Identifying and sharing best practise is a significant means of establishing, development and spreading practises in the industry which create complementary product and improve earnings and market access for the informal sector.
- The process of change is assisted by the recognition of differences between those members of each stakeholder group engaged in best practices and those who need to adopt what has been recognised as best practice.

4.3 Phase 2: Implementation and Testing

An implementation work programme to address the issues identified in Phase 1 was agreed during the May workshops in open session with both the formal and informal sectors represented alongside government. A detailed work plan was drawn up for each sub-section of the informal sector and a number of meetings were agreed to take place between informal groups and the formal and informal sectors to resolve differences. Martin Brackenbury from the Federation of Tour Operators[8] represented the UK originating market operators at the multi-stakeholder workshop and in the project steering group which subsequently agreed the work programme.

An 'appreciative inquiry' approach was used to develop the codes of conduct for each informal sector group. This involved visioning change, identifying the steps necessary to achieve it, building co-operation and self-respect. It was this approach, which enabled the creation of support for the Codes of Conduct, which emerged from the individual sub-sector workshops.

Further surveys were undertaken in February and March 2002 to provide data on the results of the project, follow up surveys were done of tourists and of the earnings of each of the informal sector groups the project worked with.

[7]These are meeting held by the tour operators for newly arrived tourists where the resort mangers and representatives provide information for their clients about the resort, the local culture and the excursion programme.
[8]The 12 members of the FTO represent over 90 per cent of the British overseas inclusive holiday market including all of the major British operators to The Gambia except for Gambia Experience.

5. Results: Defining the Problem

5.1 The Tourism Situation in The Gambia in the 2000/1 Season

The Gambia is a fairly traditional sun-sand-and-sea destination, a relatively successful winter sun destination. The Gambia enjoys relatively high levels of repeat visitation but there is increasing concern about the beach 'bumsters'. Their style of accosting tourists discourages significant numbers of tourists from leaving their hotels and this contributes to the enclave character of some of the hotels.

5.2 The Consumers' View

In the peak season 2000/1 exit survey, 90% of respondents identified themselves as package tourists (two thirds on a bed and breakfast package, one third half board). About 20% of respondents were travelling with children. 41% of respondents had been to The Gambia before. Some respondents had been up to twenty times and had visited as long ago as the early 1970s (as shown in Table 1). 90% of respondents stayed for two weeks or less (as shown in Table 2).

Table 1: Repeat visitors to The Gambia peak season 2000/1

Number Visits	Percentage of total visitors %	Cumulative%
1	56%	56%
2	17.1%	73.1%
3	6.0%	79.1%
4	4.4%	83.5%
5+	16.5%	100.0%

Source: Exit Survey, Banjul Airport Nov 2000-Febraury 2001 n=2177

Table 2: Length of stay during the peak season 2000/1

	2001	2002
1 week	51%	52%
1-2 weeks	42%	38%
3 weeks or more	7%	10%
	N=2177	N=2593

Source: Exit Survey, Banjul Airport Nov 2000-Febraury 2001 n=2177

Respondents rated sun, sand and sea, good value, and friendly people most highly as motivations for their visit. Culture, landscape and wildlife were less highly rated as motivating factors, whilst shopping, history, art and marine environment were generally unimportant. Almost all respondents had been to the beach (over 97% of first timers and repeat visitors). Combining the data for all external activities (thereby excluding beach and cultural shows in the hotels), most first time visitors (65.5%) had participated in two or more activities outside their hotels. 19.4% had done no activities outside their hotels, whilst 15.5% had done one activity (see Table 3).

In the intercept survey respondents were asked about what they had done and what they would like to do (see Table 4). This provides a fair indication of what people will have done by the end of their trip – more than 85% will have been to a cultural show, 95% will have visited a village, 43% would have been bird-watching. 63% of respondents would have liked to view agricultural work being done, but this is not provided in The Gambia (ASSET is looking at developing this product, but the Ground Handlers have not expressed much interest in it). Only 5.2% of respondents said that they had already spent a night away from their hotel on a river boating trip or spent a night away in a lodge or village. 57% said that they would like to do so and more than 50% of these said that they would like such an overnight visit to be included in their package.

Table 3: Motivations to visit The Gambia

Most important reason for visit	**Frequency**	**Valid Percent**
Sun, sand and sea	202	86.3%
Good value destination	11	4.7%
Friendly people	6	2.6%
Wildlife/bird watching	6	2.6%
Culture	6	2.6%
Landscape	1	0.4%
History/Archaeology	1	0.4%
Marine	1	0.4%
Art/Architecture	0	0.0%
Markets/Shopping	0	0.0%
Total	234	100

Source: stratified hotel intercept survey November to February 2000/1 n=252

Table 4: Activities that visitors had done, would like to have done, and how they would like to have booked

	Activities done by visitors				**Activities visitors would like to do**			
	% of sample	Booking made through			% of sample	Would like to make booking through		
Type		Hotel Desk	Local guide	Package		Hotel Desk	Local guide	Package
Cultural show	56.8	67.8%	20.3%	11.9%	26.1	28.8%	53.0%	18.2%
Village Visit	56.4	5.6%	46.5%	47.9%	38.5	18.6%	48.5%	33.0%
National Park	36.9	8.6%	69.9%	21.5%	46.4	17.1%	55.6%	27.4%
Museum	33.3	11.9%	23.8%	64.3%	42.4	14.0%	65.4%	20.6%
Birdwatching	20.6	13.5%	59.6%	26.9%	43.6	22.7%	54.5%	22.7%
Fishing	9.1	8.7%	69.6%	21.7%	35.7	15.6%	50.0%	34.4%
Agriculture/ crops	-	-	-	-	62.7	13.9%	62.0%	24.1%
Overnight	5.20		46.2%	53.8%	57.5	23.4%	24.8%	51.7%
TOTAL		24.0%	42.4%	33.6%		19.8%	48.9%	31.3%

Source: stratified hotel intercept survey November to February 2000/1 n=252

Note: the language used in The Gambia to describe local guides is ambiguous, this category could apply to official licensed guides in the informal sector, guides employed by tour operators and ground handlers or to tour operator representatives.

As shown in Table 5, visitor enjoyment of activities was high. Almost everything was rated more highly than a trip to the beach, the exceptions being visits to the crocodile pool, museums and overnight stays (although very few people did the latter). 79% of respondents had shopped in a local craft market.

Table 5: Ratings of enjoyment of activities by visitors

Activity type	Most frequent response	Average	% responses '5' excellent
Fishing	5	4.47	62.5%
Visited a Gambian village	5	4.24	46.5%
Visited a cultural show	4	4.14	35.3%
Bird watching visit	5	4.09	45.3%
Visited a park or reserve	4	4.05	31.5%
Been to the beach	5	4.00	40.1%
Visited Wassu stone circle	5	4.00	66.6%
Visited a crocodile pool	4	3.92	31.6%
Visited a museum	4	3.86	30.8%
Overnight away from hotel	4	3.82	29.4%

Source: stratified hotel intercept survey November to February 2000/1 n=252
Likert rating scale for responses: 1-5. 1=poor, 3=average, 5=excellent. It should be noted that although Visits to Wassu Stone circle were rated highly, only four of the 252 visitors interviewed had done this activity.

5.2.1 Quality of goods and services

One of the main problems identified as confronting the informal sector by the tour operators and ground handlers is its ability to deliver consistent quality. In the visitor surveys conducted in 2000/1 and in 2002 interviewees were asked to rate the quality of various goods and services on a Likert – 1-5 scale, with 5 indicating an excellent rating. Respondents felt that the quality of most goods and services was above average but not excellent. Local guides were rated highest, followed by carvings, meals and textiles. 'Bumsters' were rated very poorly (see Table 6).

Table 6: Ratings of quality of goods and services by visitors

Category of Good or Service	Index 2001	2001 % responses 'Excellent'	Index 2002	2002 % responses 'Excellent'
Local guide	4.03	39.9%	4.08	34.0%
Carvings	3.99	29.3%	4.36	32.6%
Meals excluding hotel	3.95	25.7%	-	-
Textiles e.g. cloth	3.89	22.8%	4.05	23.4%
Clothing	3.62	13.9%	3.99	26.5%
Basketry	3.56	10.8%	4.19	30.7%
Jewellery	3.46	14.1%	3.61	14.0%
Taxis	3.17	11.2%	4.02	22.5%
Leather goods	3.41	10.3%	3.96	27.5%
'Bumsters'	1.50	2.5%	1.90	1.2%

Source: stratified hotel intercept survey November to February 2000/1 n=252 & January – February 2002 n=222
Likert rating scale for responses.

5.2.2 Visitor expenditure

Respondents that participated in the 2000/1 stratified hotel intercept survey spent, on average, 596 Dalasis (£25) per person per day. Around two thirds were spent in the formal sector, and one third in the informal sector. Most of the expenditure was split between four categories:

- 27% on excursions and transport, including guides,
- 25% on meals,
- 20% on drinks,
- 22% on retail goods (souvenirs, clothing, postcards).

Table 7 summarises the breakdown of tourists' daily expenditures according to activity and sector.

Table 7: Breakdown of daily estimated visitor expenditure

	Mean expenditure per person (Dalasis)			**Proportion of total (%)**		
Category	Formal	Informal	Total	Formal	Informal	Total
Trips:						
Green (tourist) Taxis		11	11		1.8%	1.8%
Yellow (local) Taxis		5	5		0.9%	0.9%
Excursions	103	34	137	17.3%	5.7%	23.0%
Local guides		9	9		1.5%	1.5%
TOTAL TRIPS	103	59	162	17.3%	9.8%	27.2%
TOTAL MEALS	143	5	147	23.9%	0.8%	24.7%
Crafts:						
Cards/Stamps	9	6	15	1.5%	1.0%	2.4%
Carvings	10	34	44	1.8%	5.8%	7.5%
Textiles/clothing	13	33	46	2.2%	5.6%	7.8%
Basketry	1	2	3	0.2%	0.3%	0.5%
Leather goods	5	3	8	0.8%	0.6%	1.3%
Jewellery	3	13	16	0.4%	2.2%	2.6%
Other crafts	0	2	2	0.1%	0.3%	0.4%
TOTAL CRAFTS	41	93	134	6.9%	15.6%	22.5%
TOTAL DRINKS	112	5	117	18.8%	0.9%	19.7%
'Bumsters'		10	10	0.0%	1.8%	1.8%
Beggars		3	3	0.0%	0.5%	0.5%
Other		22	22	0.0%	3.7%	3.7%
TOTAL	399	197	596	66.9%	33.1%	100%
GBP £1=23.8 Dalasis	£16.76	£8.27	£25.04	66.9%	33.1%	
USD $1=16.3 Dalasis	$24.47	$12.8	$36.56	66.9%	33.1%	

Source: stratified hotel intercept survey November to February 2000/1 n=252 Exchange rates based on average for 120 days of survey period.

The results show that the informal sector captured approximately one third of total tourist expenditure in The Gambia. On average the tourists were spending 596 Dalasis (£25 or $36) per day; of which 197 Dalasis (£8 or $12) per day was being spent in the informal sector in the peak season of 2000/1.

In 2002 the airport exit survey was amended to include a figure on average daily expenditure; this figure was significantly higher at over £30, with crafts accounting for 21.8% of in resort expenditure and 53% of cash being spent outside the hotels. The average tourist was taking home £23.14, which they had as surplus spending money. Nearly 30% of people had spent all their cash; nearly 40% of respondents were leaving with between £11 and £50 in cash. Clearly there is scope for both the formal and the informal sector to be selling more goods and services to tourists in The Gambia.

Table 8: Cash being taken home

Amount	**Percentage of Total**
0	29.4%
£1-10	10.5%
£11-50	38.1%
£51-100	13.2%
£101-200	6.3%
£201-500	2.2%
£500+	0.3%
Total	100%

Source: exit survey conducted at the airport n=2593

5.2.3 Repeat Visitors

Verbal feedback from tourists to their destination tour operator representatives, together with results from written consumer satisfaction surveys, reflected key concerns. Key positive factors reported regarding The Gambia were its climate and the friendly local people. Tourists also mentioned that they liked the 'simplicity' of the country, the cheap food and drink, and the friendly hotel staff. However, all operators stated that the key negative concern for tourists was being hassled and intimidated by 'bumsters'. Poor hotel standards were also considered to be a problem by two of the operators, and one noted concern regarding the side effects of malaria prophylactics (Lariam).

The visitor survey showed relatively high levels of satisfaction with the activities available to tourists. Over half of respondents were very likely to return to The Gambia (54.4%) and very likely to recommend The Gambia to a friend. However, as visit frequency increased, so the amount spent per day, the amount spent in the informal sector, and the proportion of expenditure in the informal sector all fell. Repeat visitors were less likely to engage in activities for which they would pay. There is a strong negative relationship between frequency of visit to The Gambia and the *number* of activities undertaken away from hotel and beach. Essentially, those visitors who were on repeat visits to The Gambia did fewer activities. The difference in mean number of activities between first time visitors and repeat visitors was significant (t tests, $p<0.05$ and 0.001 respectively). Each first time visitor engaged on average in 4 paid activities, second time visitors nearly 3, and people in The Gambia for a third time or more averaged only 1.8 paid activities during their visit (see Table 9). This is partly because repeat visitors tend to do less sightseeing and when they do they tend to be more independent, but it also reflects that lack of new day excursion and other activities. This is an area where the informal sector can make a significant contribution by diversifying and enriching the day excursion and activity offer.

Table 9: Number of visits to The Gambia and No. of activities

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%

Source 2001 Visitor Survey n=25 1USD= 16 Dalasi

5.3 The Informal Sector's View

All of the informal sector groups felt that the formal sector did not do as much as it could and should to promote the goods and services of the informal sector. They felt that tour operators in their Welcome Meetings did not encourage, and that in some cases they actively discouraged, tourists from visiting craft markets, engaging local guides and buying juice and fruit. Similarly, they felt that the hoteliers could do more to encourage tourists to engage with the informal sector and poor producers in particular by making tourists aware of the services they provide and encouraging them to purchase crafts, fruit and juice, and to use the services of guides. Table 10 presents the obstacles identified by the informal sector groups who operate around the hotels at Kololi and Kotu Beach.

Table 10: Informal sector perceptions of the barriers they encounter in attempting to access the market.

Barrier	**Craft Vendors**	**Fruit Sellers**	**Juice Bars**	**Guides**	**Tourist Taxis**	**Potential Solutions**
Lack of promotion by the formal sector – negative presentation. Lack of linkages with the formal sector.	□	□	□	□	□	Improved access to welcome meetings and promotion in hotels
Lack of awareness among the tourists and fear	□		□		□	Education of tourists and promotion by tour operator representatives
Too much competition within the sector	□			□		Change the behaviour of micro entrepreneurs – encourage roster and non-price competition.
Tourists bargaining too hard	□	□		□		Tour operators and hotels to give information to guests so that they are not rude and will pay a fair price.
Commissions	□		□			
Lack of advertising and promotion	□					
Lack of marketing knowledge	□					

Table 11 shows the views of the informal sector about how each of their perceived barriers could be overcome, gathered during the workshops in preparation for the multi-stakeholder workshops in May 2001.

Members of the informal sector who participated in the preparatory workshops generally recognised that overcoming these barriers would require that industry, poor-producers and government work together to reduce or remove the barriers to facilitate market access for the poor producers. The informal sector sought support from the formal sector in providing more information about the goods and services produced by them. They also asked that the formal sector provides more positive and more balanced information particularly in the Welcome Meetings. They recognised that this information needed to be provided in a 'how to get more out of your holiday' frame of reference. They also recognized that their relationships with the ground handlers, tour operators and hotels were not good. They sought to normalise those relationships around clear contractual agreements, and recognized that they needed to develop codes of conduct – backed by licensing and enforcement mechanisms. They sought recognition from the formal sector for the improvements which had been made, and support for new initiatives in product development, quality enhancement and a reduction in hassling.

Table 11: Barriers to informal sector participation in the tourism industry in The Gambia

Barrier	Way of overcoming it
Lack of positive information provided inside the tourism enclave by the hoteliers and operators.	Hoteliers and tour operators providing balanced information about the goods and services provided by poor producers. 'What's On' notice boards in the hotel lobby. Production of a monthly newspaper giving news and motivational copy and advertising services. Directory of informal sector suppliers of goods and services. The poor producers sought positive recommendation for the established industry at Welcome Meetings and in the day to day conversations between tourists and company representatives and other staff.
Quality and standards assurance. Insurance, health, safety and security	Industry awareness of the codes of conduct and the training provided by the Gambian Tourism Authority and others, backed by licensing, badging and effective monitoring and enforcement procedures. Insurance and licensing needs to be effectively enforced by government agencies
Lack of access to tourists inside the hotels and during sightseeing excursions	Hoteliers inviting in craft vendors on a roster basis to sell inside hotels, on one or two days each week in the season. Allowing fruit sellers and juice pressers to deliver to their clients in the hotels. Ground handlers including poor producer visits in their excursion programmes subject to guarantees on quality and consistency.
Lack of cross cultural understanding; behaviour of tourists: aggressive bargaining and difficulty in coping with the 'bumsters'	Tips for Tourists, Do's and Don'ts – motivational in style designed to help people get more out of their holiday.
Hassle in the markets discouraging tourists from shopping there	Codes of Conduct agreed between stall holders and enforced by the committees, backed by the Gambian Tourism Authority and the government.
Development of new products	Requires on going support funded by government or development agencies. Study Tours and other forms of technical assistance.
Competition	Excessive competition between poor producers can reduce margins to zero or sometimes make them negative. Increasing the market will reduce this only if new producers are not encouraged in to directly compete with existing poor producers, unless the market is large enough to absorb the competition.
Normalising relationships	The established operators need to be able to take commissions on bookings made in the normal way in the industry to break down the barriers between the formal and informal sectors.
Local sourcing	Local sourcing requires trade markets and development of co-operatives or wholesale markets able to provide consistency of supply, volume and quality.
High levels of conflict between poor producers and between the poor producers and the formal industry	Negotiating agreements between the different stakeholders with effective means of enforcing the agreements and backed by the Gambian Tourism Authority and the government.

5.4 The Formal Sector's View

The views of the tour operators, ground handlers and hoteliers were necessary both to an understanding of the issues as they saw them and to engage the industry in discussion about potential solutions to the problems which both the formal and the informal sector identified. Interviews were conducted with six of the seven UK tour operators' representatives in The Gambia (Stadhams 2001).

Table 12 The Formal Sector Perspective

	Tour Operators n=6	**Ground Handlers n=4**
Key criteria for products and services	Health & Safety (6) Quality of products & service (3) Reliability and safety of transport (3) Suppliers adequately insured (3) Good value for money (5) Good relationship of informal sector supplier with ground handler (2)	Confidence to supply at consistent standards (4) Public Liability Insurance (4) Local license (3) Tax certificate (1) Price (1)
Key negative customers concerns	'Bumsters' and Hassle (6) Malaria (1) Some hotel standards (2)	N/a
Attitudes towards informal sector	Important to establish personal relationships with the 'bumsters', explain as poverty issue (3) 'Bumsters' do not understand the consequences of their behaviour (1) Supports linkages through welcome meeting s (1) Warns guests to go out in groups and take taxis to avoid 'bumsters' (2) Encourage guests to experience local interaction but warn of difficulties (2) Recommend bush taxis with caution (2) Support and recommend licensed guides (3) Concern about licensed guides operating uninsured excursions and undercutting ground handlers (1) Recommend local entertainment, tailors and craft markets (1)	Informal arrangement – stop at craft stalls (2) Use tourist taxis if necessary (1) View many as unfair competitors (2) Hotel staff collaborate with unlicensed operators to sell excursions (1) Would support ethical co-operation (1) Willing to collaborate if products and services are suitable/legal/reliable (1) Too much hassling (1)
Suggestions for improving informal sector access	Deal with 'bumster' issue (2) Ground agents are best link to informal sector (1) Need to understand that hassle free holidays bring repeat business (1) Could work with ASSET to help shape product & services by supplying guidelines and criteria for contracting product and services (1)	No direct dialogue yet between Ground Handlers and ASSET (1) Open to suggestions from ASSET (2) Informal sector needs to learn to be less aggressive (1) Recommend services as appropriate (1) Must have insurance guaranteed rates & quality (1) Public education to reduce hassling

Source Table developed from Stadhams 2001

The tour operators and hoteliers had concerns about quality, security and safety – and there were clear areas of commercial conflict. The problems of 'unfair' competition were and are particularly intractable – the licensed operators object to competition from the local guides organising tour programmes with unlicensed vehicles rather than doing individual guiding, and the guides resent being ghettoised in the provision of short walking tours.

Box 2 shows the range of initiatives already being undertaken by the formal sector. If they were extended and generalised across The Gambia they would bring considerable benefits to poor producers.

Box 2: Formal sector good practises identified in The Gambia

Tour Operators

- Providing information at the Welcome Meetings about the fruit pressers, fruit sellers, local guides and craft markets,
- Encouraging tourists to encounter and engage with local people in the markets and on the beach.

Ground handlers

- Calling at craft markets during excursions,
- Visiting villages, schools and agricultural communities during excursions – and working with the hosts to counter 'bumstering' and begging by children.

Hoteliers

- Locally sourcing fruit and vegetables, crafts and soft furnishings,
- Allowing fruit and fruit juice sellers into the hotels to deliver to established clients,
- Inviting in craft workers on a roster basis to sell one day per week in the hotel grounds.

5.5 'Bumsters'

'Bumsters' are young men who engage tourists in conversation/hassle tourists in order to establish a relationship with the intent of providing services for which they can earn either from the tourists or from stall holders who pay commissions. The stallholders at the Brikama woodworkers' market rely to some extent on 'bumsters' to bring them business and they are happy to pay commissions. The tourist survey undertaken in the high season of 2000/1 showed that, of those unlikely or very unlikely to return (n=29), half suggested that this was because of 'bumsters'. The same questions were asked of very comparable samples of visitors in 2000/1 and in 2002.

There was some engagement with the 'bumsters' as part of the multi-stakeholder process in 2001. It was clear that the 'bumsters' would not operate as they do, engaging tourists in conversation and making friends of them, if it was not a relatively productive way of earning money and if there were no role models to emulate. All 'bumsters' are able to point to specific examples of friendships established, cars and cash received, and of young men who have secured funding for education and marriage through 'bumstering'. The 'bumsters' are often high school students who were unable to complete their education because of financial hardship, many of them return to their family in rural areas during low season.

Table 13: Attitudes to 'bumsters' amongst tourists in 2000/1 and 2002

	2000/1	2002	Change
Fun	9.5%	11.6%	▲ 2.1%
Off-putting	69.1%	38.6%	▼30.5%
Intimidating	21.4%	49.8%	▲28.4%

Source: Stratified hotel intercept survey November to February 2000/1 n=252 & January – February 2002 n=222

The scale of the difficulties surrounding 'bumsters' increased dramatically during the period of the TCF project. As shown in Table 13, the number of people finding 'bumsters' intimidating increased by 28% in the twelve months. Anecdotal evidence supports this, and verbal abuse of tourists by 'bumsters' is significantly more aggressive with the use of racist taunts. What is unclear are the causes: increased police and paramilitary activity against 'bumsters' took place in the 2001/2 season and this may have made 'bumsters' more aggressive as they operated in short intensive periods. There is no doubt, however, that the problem has worsened and there have been instances of teachers bringing whole classes to hotels and beaches to 'bumster' as a class. At the beginning of the 2002/3 season the army was used to police the Tourism Development Area and 'bumsters' have been swept off the beaches and out of the tourism areas, and to some extent 'bumstering' has been displaced to more rural areas.

An experimental workshop held in July 2001 with those 'bumsters' associated with Palma Rima was successful in identifying ways in which they could work both together and with the hotel. As a result, 13 of the Palma Rima 'bumsters' became official licensed guides, having taken the government-training course, while the remainder were restyled as local guides with a Code of Conduct (see Box 3). Subsequently the stringent policing of the 'bumsters' has largely removed them from the scene. There are small-scale experiments at Lamin Lodge where some ex-'bumsters' are being retrained as local nature guides and at the Safari Garden Hotel where a small group of local ex-'bumsters' have been retrained as hotel guides and accompany guests to and from the shops and the beach. The publication of Mango News, modelled on street newspapers like the Big Issue, and the employment of ex-bumsters to sell it to tourists and others, is another example of good practice.

Box 3: Palma Rima local guides draft code of conduct

Each local guide will act at all times in ways that lead to the public having trust and confidence in them; enhances the good standing and reputation of the Association; looks after and preserves Gambian culture; and above all safeguards the interests of tourists.

Each local guide is accountable for his or her own conduct and will:

1. Act always to promote and safeguard the well being and interests of tourists
2. Ensure that no action or inaction on his/her part is harmful to the service or safety of tourists
3. Always be neat and tidy in appearance and will avoid 'rasta' clothing or hairstyles
4. Take every opportunity to improve their knowledge, skills and competence
5. Promote good relationships, work in a collaborative and cooperative way, and respect the contribution made by other sectors
6. Take account of the customs, values and spiritual beliefs of tourists
7. Avoid any action, which harms the relationship between local guides and tourists
8. Try to resolve problems themselves and will seek outside assistance if there is no immediate resolution
9. Have a system to seek feedback from tourists
10. Behave appropriately by ensuring that there is no hassling of tourists; or violence; or bad language; or stealing; or cheating; or the carrying of weapons; or the use or selling of drugs (including alcohol) whilst on duty
11. Accept jobs as they are allocated and not act in ways that bypass the system
12. Protect the environment and encourage tourists to act similarly
13. Help other guides to develop their skills, knowledge and competence and be ready to assist others so that the needs of tourists are met
14. Wait for guests to offer a price for their services and not seek gifts or favours that would interfere with the relationship that must exist between tourists and local guides
15. Take any action that will meet the needs, interests or safety of tourists
16. Act always in the interests of the Association except where such action would harm the safety of oneself, other guides or tourists

Tourism attracts young unemployed men for whom there are few if any alternative sources of employment or income. However, strategies which rely on turning 'bumsters' into official licensed guides, risk undermining the earnings of the existing official licensed guides to and their adherence to their codes of conduct. The official licensed guides are often referred to as licensed 'bumsters' by the formal sector. This reveals both the attitudes of some members of the formal sector and the pressure there is in this section of the market – both within the informal sector and between the informal sector and the formal sector. The supply of guiding services outstrips demand, resulting in intense competition and hassling for business.

6. The Agenda for Change

At the end of the workshop process there was high degree of consensus amongst the informal sector groups about the steps (outlined in Box 4) necessary to improve their access to tourists in formal sector hotels and inclusion in tour operator endorsed and marketed excursion programmes. Each of the informal sector groups saw developing a Code of Conduct, which would regulate behaviour within the group and between group members and other informal and formal sector groups, as important. Those who did not have any clear badging system (the fruit sellers, juice pressers and bird guides) also sought formal recognition. The formal sector participated in the multi-stakeholder workshop, where the Hotels Association and the Ground Handlers were represented and the Federation of Tour Operators played a significant role in securing multi-stakeholder agreement to the work plan which was formally endorsed by the Gambia Hotel Association, the Ground Handlers and Equipment Hirers Association, the Federation of Tour Operators and the government.

Box 4: The agreed agenda for change

- Development of Codes of Conduct for each informal sector group
- Licensing to be extended and backed up by badging
- New destinations and products to be developed
- Insurance to be required for 'high risk' informal sector activities – particularly the fishermen and accommodation providers
- Local sourcing of food, supplies and soft furnishings
- What's On information to be placed in hotels and a regular publication to be produced

Source Notes of Meeting of Project Steering Group 15 May 2001

The following table presents a summary of what was agreed in May 2001.

Table 14: Summary of strategies agreed to reduce barriers and increase incomes for the informal sector sections

Section	Code of Conduct	Badging	Licensing	Insurance
Fruit sellers	Necessary	Necessary	Already Exists	Low risk
Juice Pressers	Necessary	Necessary	Already Exists	Low risk
Guides	Necessary	Already Exists	Already Exists	
Tourist Taxis	Necessary	Already Exists	Already Exists	Already Exists
Fishermen	Necessary			Necessary

It was agreed that 'Codes of Conduct' were necessary for each section of the informal sector. Each code dealt with the relationships between informal sector poor producers, between groups of poor producers and between the informal sector as a whole, the formal sector and the tourists. The same appreciative inquiry approach was used to develop the codes of conduct for each informal sector group, visioning change, identifying the steps necessary to achieve it, building co-operation and self-respect. It was this approach, which enabled the creation of support for the Codes of Conduct, to emerge from the individual sub-sector workshops. Badging and licensing were used to back up the Codes of Conduct, to create a less hassled environment for tourists and to increase confidence, amongst potential consumers, in the products and services sold by poor producers.

ASSET worked with Gamstar a local insurance company, and increasing numbers of ASSET members are taking out the appropriate insurance cover. ASSET is currently negotiating to earn a commission from sales of insurance to ASSET members and to sell some advertising space to Gamstar – this will assist ASSET by providing a small but significant funding stream. Gamstar is also willing to discuss the idea of joint membership/insurance certificates for members. The fishermen who attended the May workshops were unable to meet the relatively high costs of insurance and have dropped out from ASSET. Those ASSET members with accommodation, restaurants/bars or transport are taking out insurance with Gamstar.

Two editions of Mango News were produced by ASSET in January and April 2002. This kept the membership informed of developments and provided a mechanism for sharing examples of good practise in the informal sector. The magazine was also distributed to the formal sector as a way of maintaining dialogue. Mango News is now being printed on printing presses secured for the purpose and ex-'bumsters' are selling it. It is using the business model developed by the international street papers movement. The first of the new editions was sold out in three days and this significant new way of communicating with tourists looks set to be sustainable, covering its costs from advertising and sales revenues, as well as creating some paid self-employment for ex-'bumsters'.

Some of the Welcome Meetings have involved representatives of the informal sector groups but this remains a contested area. There remains concern about what is said by tour operator representatives at Welcome Meetings, and as a result this is a source of friction between the formal and informal sectors. Towards the end of the last season the guides were being excluded from Welcome Meetings because they were seen as competing with tour representatives and the excursions that they sell.

In November 2002 UK operators to The Gambia agreed that they would review the information produced by ASSET and the Gambian Tourism Authority to see if any of it could be included in the Welcome Packs and hotel information-packs consulted by tourists. ASSET has produced a new directory (available on line www.asset-gambia.com). The tour operator representatives undertook to review the document and see if any parts of it could be included in their briefings for tourists. The two major issues which recur in these discussions are those of safety in connection with the EU Package Travel Directive and competition.

The taxi drivers became enthusiastic members of ASSET and have increased their own level of organisation, learning from ASSET practises. The workshop run by ASSET in June 2001 which focussed on process, was particularly important. The Taxi Drivers are now talking constructively with government and with the new Gambian Tourism Authority and the taxi drivers at Senegambia worked together to build a mosque. However, problems over the licensing and safety certification of the tourist taxis had not been resolved by the end of the project and this frustrated the development of linkages between tourist taxi drivers and other groups in the informal sector and between the taxi drivers and the formal sector. Until the Gambian Tourism Authority resolves these licensing and safety issues little progress is possible of market access.

7. Specific Initiatives

7.1 Fruit Sellers

There are a large number of fruit sellers, 26 – all female – working on Kotu Beach. They used to sell to tourists by hawking their baskets of fruit on the beach, walking back and forth approaching tourists all day. The tourists felt hassled and some felt intimidated by the constant approaches to buy fruit and the women felt demeaned as they traipsed back and forth on the beach looking for business.

A Code of Conduct was developed with the fruit sellers, which covered their relationships with each other, the hotels and the tourists. They now identify whom each customer 'belongs to' and no longer quarrel over business. Advertising via the 'What's On' boards in some hotels was successful

Attempts to diversify the product offer into jams and sauces were unsuccessful. The women felt that tourists just want fresh fruit and fruit salad, they did not want to purchase jams to take home.

The official registration of their society, following the creation of the code of conduct, meant that they were trusted enough to obtain a loan, used for buying produce. The fruit sellers also now put a small amount of money into a communal fund.

A new stall, from which the women now sell their fruit, was constructed as a result of the Tourism Challenge Fund initiative. The stall was built with assistance from the Bungalow Beach Hotel (which provided paint) and the Kombo Beach Hotel (which provided some cash, labour and materials). The 26 stall holders each contributed to the costs. The TCF project employed an artist to ensure a high quality image for the stall.

Poverty Impact
The fruit sellers estimate that their incomes have increased by 50-60% as a result of the changes in the way that they conduct their business and improved access to the tourists. The stall has changed the nature of the relationship between the women and the tourists; they no longer hawk and the women have considerably more dignity selling from behind their stall. The change in the atmosphere on the beach has also assisted other informal sector poor producers, in particular the craft vendors at Kotu Beach (see 7.4 below). .

7.2 Juice Pressers

At workshops held in August 2001 the juice pressers created the code of conduct (see Box 5) and regulations for the association, which is now registered officially with the government. The registration of the organisation has provided the association with direct access to government tourism officials and has allowed the association's committee to regulate membership. No new members are permitted where an area is considered full and any member who does not abide by the code of conduct can be suspended or expelled. This power has been used a few times where members quarrelled over business or were felt to be hassling tourists. Fixed prices for juice have been introduced and are displayed on menus on each of the stalls, which have the function of badging the fruit pressers. Along with better organisation this, has increased the juice sellers' incomes. The fixed prices work despite seasonal changes in fruit prices.

Box 5: Juice pressers code of conduct

Each Juice Presser will act at all times in ways that lead to the public having trust and confidence in them; enhances the good standing and reputation of the Association; looks after and preserves Gambian culture; and above all safeguards the interests of tourists.

Each juice presser is accountable for his or her own conduct and will:

1. Act always to promote and safeguard the well-being and interests of tourists
2. Ensure that no action or inaction on his/her part is harmful to the service or safety of tourists
3. Always be clean and tidy in appearance and will wear the uniform and cover 'rastas' with a hat
4. Take every opportunity to improve their knowledge, skills and competence
5. Ensure that annual medical screenings are undertaken
6. Promote good relationships, work in a collaborative and cooperative way, and respect the contribution made by other sectors and security
7. Take account of the customs, values and spiritual beliefs of tourists
8. Avoid any action which harms the relationship which exists between juice pressers and tourists
9. Try to resolve problems themselves and will seek outside assistance if there is no immediate resolution
10. Have a system to seek feedback from tourists
11. Have good timekeeping
12. Behave appropriately by ensuring that there is no hassling of tourists; or violence; or bad language; or stealing; or cheating; or the carrying of weapons; or the use or selling of drugs (including alcohol) whilst on duty
13. Ensure that the playing of games on the beach does not affect appearance and hygiene
14. Protect the environment and encourage tourists to act similarly
15. Ensure that guests see the menu and fixed prices and not seek gifts or favours that would interfere with the relationship that must exist between tourists and juice pressers
16. Take any action that will meet the needs, interests or safety of tourists
17. Act always in the interests of the Association except where such action would harm the safety of oneself or tourists
18. Understand that failure to contribute to the Association and obey the rules and regulations will result in a fine or suspension.

Advertising on the 'What's On' Boards in the local Bungalow and Kombo Beach Hotels and the positive changes in the atmosphere on the beach resulted in significant increases in the earnings of the juice pressers (see Table 15).

Poverty Impact

Table 15: Juice presser earnings at Kotu Beach 2001/2

	2001	2002	Change
Mean daily turnover	66.7	148	132%
Mean daily surplus	47.5	105	128%
Weekly Income Dalasis	333	736	121%

Source: TCF surveys. These reflect only peak season earnings

Problems remain: the juice pressers feel that the tour operators tell their guests not to buy juice as they say that the sellers do not wash glasses properly. This is strongly denied and juice sellers would like tour operators to visit and see the high standards of hygiene employed. Members of the association took part in a food handling/hygiene course provided by the government and have current food hygiene certificates. However, the juice pressers say that a significant impediment to this business is their lack of access to clean water and to sanitation facilities for the vendors. Tour operators in The Gambia would like to see more fresh juice, rather than canned and bottled juices, in the hotels particularly at breakfast, provided that the hotels can be assured that the juice has been hygienically produced.

7.3 Licensed Guides

Official tourist guides are local guides who are licensed by the GTA and who offer local trips (e.g. to markets etc.) as well as longer excursions. A large group of guides operates outside the Senegambia Hotel in one of the main tourist areas. Other smaller groups operate outside a number of hotels in the Kotu beach area – the other main tourist district. The official tourist guides run some of their trips using tourist taxis – these are taxis which have been licensed for tourist use on the basis of meeting certain standards that are not necessarily met by the regular ('bush') taxis. There has always been a certain degree of concern amongst tour operators about the safety of the official guides, as well as an issue about competition over excursions since the guides offer many of the same excursions as the tour operators at a lower price.

The licensed guides have benefited from the 'What's On' boards, and there has been some reduction in conflict between the guides, taxi drivers and the formal sector. They have drawn up and adopted Codes of Conduct, which have made a difference to the sense of collective responsibility amongst the guides. At Palma Rima, where there is a serious problem with 'bumstering' around the hotel, licensed guides have introduced their own logbook which records who has worked and where they took their clients. They also record the level of customer satisfaction by asking clients to write in the log when they return. They suspend guides for minor infringements of their Code and have taken the uniform from one guide who they felt had been complicit in one of their clients being robbed in the market. GTA is determined to back the guides when they take this kind of action and to withdraw the licenses of offending guides. The licensed guides at Kotu Beach were getting significantly more work in 2002, while at Senegambia the increase in earnings was a result of the increase in the average income per trip.

Poverty Impact

Table 16: Increase in licensed guide earnings at Senegambia and Kotu Beach

Senegambia	**2001**	**2002**	**Change**
Mean income per trip	D144 (8.8 USD)	D174 (10USD)	▲ 20.8%
Trips per week	2.38	2.49	▲ 4.6%
Mean weekly income	D345 (21.1 USD)	D408 (24USD)	▲ 18.2%
Kotu Beach			
Mean income per trip	D93 (5.7 USD)	D94.2 (5.5USD)	▲ 1.3%
Trips per week	3.06	4.2	▲ 37.25%
Mean weekly income	D285 (17.4 USD)	D380 (22USD)	▲ 33.33%

Source: TCF surveys. These reflect only peak season earnings.

At the November 2002 meeting of tour operators to The Gambia in London the UK operators were very clear and firm in saying that it is not the role of UK operators to define what the official tourist guides can and cannot do. In their view it is the function of the Gambian Tourism Authority to regulate the guides. The tour operators are not in a position to recommend the guides. A complaint form has been developed by GTA, which tour operator representatives can use to inform the GTA of cases that require investigation by the Authority. The tour operators felt that open commercial competition within a regulatory framework provided by the GTA was the best way of reducing conflict between the official guides and the formal sector.

7.4 The Craft Markets

The Tourism Challenge Fund project in The Gambia worked with two craft markets, Kotu Beach and the Senegambia (Kololi Beach) in quite different situations. However, there are some general lessons, which have been learned from the experience of seeking to improve livelihoods in the markets.

In the implementation phase of the TCF initiative the two craft markets made significant changes in order to increase the earnings the craft workers:

1. Codes of Conduct (see Box 6) governing the way the traders do business in the market were successfully introduced and there was, as a result, much less hassling and a significantly improved atmosphere. The code of conduct worked well, hassling stopped and more tourists came, repeat visitors commented on the improvement. The fact that the Senegambia won the Best Market category in the new National Tourism Awards in 2002 enabled the strong reinforcement of the benefits of operating a hassle free market.
2. The Body Shop workshops and individual sessions held with the craft workers resulted in some product diversification, improved labelling and merchandising skills. However, the craft workers felt that they needed far more support to make the changes and to develop new products. Specialisation has become a market buzzword but many stallholders need further support to develop the idea.
3. The free market days, where on a roster craft stallholders are invited in to the hotels to make sales, were extended to hotels at Kotu Beach and contributed significantly to increased earnings.
4. Stall holders recognised that they made more sales when they were producing on the stalls, tourists buy more from crafts people when they see them making goods and this also encourages the commissioning of craft items. These changes contributed to increased sales.
5. Limited efforts with labelling and small interpretation panels about the craft products, demonstrating the cultural background and often prolonged production process also contributed to increased sales.
6. ASSET has developed a new product: gift baskets which are composed of a range of craft and produce (soap/beeswax/honey) for sale through markets stalls and supermarkets and at the airport.

Box 6: Code of conduct for Senegambia craft market

1. **Hassle Free Market**: Guest coming in the market should be welcomed in the friendliest manner. No one should hassle guests. All guests should be allowed to tour the market freely. Anyone found hassling guests would be suspended for two weeks.
2. **Misconduct:** Quarrelling, fighting or general disorderliness in the market will carry a suspension of one month and two weeks. Consequences for fighting is one month whiles two weeks suspension would be for quarrelling and disorderliness.
3. **Fair Trade**: Fair trade practices should be maintained at all times by vendors. Anyone found breaking this rule would be suspended for one month.
4. **Drugs**: Smoking and peddling of drugs by any stallholder will be reported to the GTA. Non-stallholders who break this rule will be sent off the market.
5. **Watchmen Salaries**: The payment of fees for watchmen salaries shall be on the 5th. of every given month. Anyone failing to pay shall have his or her 'Hotel African Market Day' forfeited.
6. **Hotel African Market Days**: All vendors attending this programme in hotels should maintain discipline and adhere to the rules set by the hotel management. Anyone found violating this rule will be suspended for one month. Vendors are urged to wear African costumes during this programme.
7. **Stock Registration**: There should be the registration of all items on sale by stallholders and each member should stick to items registered. Those who were stallholders and are unfortunate not to be allocated with stalls, will be allowed to operate in and will sell any item they prefer.
8. **'Bumsters'**: 'Bumsters' are not allowed to go round with guests in the market, they should stop and wait at the gate of the market. Stall owners should refrain doing the same and failure to accept the rule the member concerned will be suspended for two weeks.
9. **Participation in Other Marker Activities Like Cleaning Exercises (SET – SETAL):** Anyone who fails to participate in any market activities e.g. 'set-setal' geared towards the development of the market will be suspended for two weeks.
10. These codes of conduct are binding to all those operating in the market, be they members of the committee or not. Anyone found to be violating the codes of conduct shall be accordingly dealt with. Any member who feels unjustly penalised shall have the right to appeal formally to the committee. ASSET and the GTA will be approached to serve, as mediators were necessary.

Poverty Impact

There was a three-fold increase in incomes at Kotu Beach Craft Market (see Table 17), a consequence of increased sales in the established market and the very successful free market days introduced at the Bungalow Beach Hotel. Craft market producers and vendors benefited directly from the improved relationships between tourists, local hoteliers and informal sector producers following the successful fruit sellers initiative and the reduction of hassle on the beach. There was also an increase in employment at Kotu Beach Craft Market: there were 43 additional people working as assistants on stalls in the market in 2002 compared with 2001. Of these 43 new jobs, 26 (60%) were given to relatives. The stall holders at the Kotu Beach Craft Market reported that, on average, 80% of their earnings came from the making and sale of crafts.

Table 17: Earnings comparison for Kotu Beach Craft Market 2001/2

	2001 Mean	2002 Mean
Sales	96.5	335.3
Cost of Goods	55.3	209.4
Commission Payments		1.3
Income Dalasi	41.2	122.8
Income USD	2.5	6.46

Source: TCF surveys.

At Kotu beach there was increased awareness of the fact that they do hassle tourists too aggressively: the proportion of stallholders who asserted that there was too much hassle in the market increased from 27% to 90%. The traders at Kotu Beach have not been so successful as at Senegambia in controlling their own behaviour, but there is heightened awareness of the problem and they have made further progress since February 2002. The proportion of the day when someone was producing craft on the stall increased significantly. The number of stalls with craftwork being done on the stall for more than 50% of the time increased from 6 to 16 out of a total of 46.

The Senegambia Craft Market now has a large sign at the entrance declaring it hassle free. Between the two surveys the number of market stallholders who felt that there was too much hassling of tourists dropped from 85% to 15%. The Code of Conduct and the empowerment of the traders that this fostered has achieved a great deal. There has been a marked fall in the number of stallholders who feel that tourists bargain too aggressively from to 96% to 66%. The level of aggression in the market has dropped significantly.

The proportion of the day when someone was producing craft on the stall increased significantly. The number of stalls with craftwork being done on the stall for more than 50% of the time increased from 52 to 86 out of a total of 150. There was no evidence of any increase in the employment of people in any workshop associated with the market stalls, however, there were 19 additional people working as assistants on stalls in the market in 2002 compared with 2001. Of these 19 new jobs, 12 (63%) were given to relatives. Table 18 shows that average earnings per stall, in peak season, doubled in the year.

Table 18: Earnings comparison for Senegambia (Kololi Beach) craft market 2001/2

	2001 Mean	2002 Mean
Sales	162.13	316.92
Cost of Goods	97.94	194.79
Commission Payments		2.01
Income Dalasi	162.13	316.92
Income USD	9.9	16.68

Source: TCF surveys.

There is continued awareness of the need to increase the quality of crafts sold in the Senegambia market (57% in 2002) and the vast majority recognise the need to create new products and to diversify their range.

For the Senegambia Craft Market there is comparable data on the number of stall holders who felt that their income was not sufficient to cover basic needs – in 2001 93.4% felt their income from the stall was not sufficient to cover their basic needs, by 2002 this had dropped to 56.4%.

Box 7: Impact of the Body Shop craft merchandising and product development intervention

Ibu and Ami were the two craft market stallholders at the Senegambia craft market with whom the Body Shop worked directly.

Ibu makes and sells leather bags, shoes etc and developed some new products and changed his display as a result of the Body Shop intervention This has increased business significantly. Overall, he feels that the market is now a more peaceful place as there is less hassle and tourists enjoy it more. He said the costs involved in changing the presentation of his shop were not significant although development of new products did cost money. He felt that other vendors could easily repaint and display their goods and also that they should sell more traditional items such as bedspreads, pillow cases, curtains and traditional dress rather than all selling the same products made for tourists.

Ami was also involved in the Body Shop project; she now sells small dolls, dressed in traditional Gambian clothes. She also sells traditional outfits for the dolls and says that they have been very successful and are important since they are the only product on the stall she makes herself. Ami is experiencing some problems over supply but has sold some 100 in the season at 60D (a turnover of US$315).

Source: Claudia Townsend

The Craft Market Vendors at Senegambia and Kotu Beach have established a joint committee to:

- promote specialisation of products and stalls
- motivate people to specialise by creating awareness
- enhance creative activity – to share ideas and organise practical training
- create new product ideas and add value to existing products
- research and to arrange exchanges with neighbouring countries
- marketing through group adverts, product labelling and presentation.

The committee will meet once a month and alternate between the two markets It will continue the work begun following the May 2001 multi-stakeholder workshops.

8. Lessons Learned

8.1 Developing a Consensus for Action

The Tourism Challenge Fund project in The Gambia demonstrated the importance of developing business linkages between the formal sector tour operators, ground handlers and hoteliers to facilitate the engagement of poor producers in the industry; and developing a consensus about the nature of the problems which can form the basis of agreements about what needs to be, and can be done.

The multi-stakeholder process, developed on the basis of some firm evidence about what the tourists and the various stakeholder groups saw as the problems confronting tourism in The Gambia, was fundamental to building a consensus for action. No one group is able to change the way a destination functions; it requires action by the formal and informal sectors working together and with the full support of government.

The tourism sector is highly fragmented and inter-connected, there are significant opportunities for co-operation through the supply chain but this is made more difficult by the relatively small margins in a highly competitive market place. The Gambia is in fierce competition with a large number of comparable destinations and its success as a destination in large part turns on its reputation for cheap winter sun. Whilst the informal and formal sector have a shared interest in creating a stronger, more attractive destination to compete with other sun, sand and sea destinations once the tourists arrive in The Gambia there is fierce competition to secure business. As an example, there is fierce competition over the sale and supply of guided excursions. The income earned from guided excursions is significant to the tour operators and their managers and representatives as the commissions earned from the sales of excursion programmes are a significant source of income, which supplements their salaries. For ground handlers the provision of excursion programmes to tour operators is their core business; and for their drivers and guides it is their employment, which is dependent upon sales of excursions by tour operators to their clients. The official licensed guides seek to maximise their sales of guided excursions to the same tourists and to offer higher value excursions to the same kinds of attractions which are offered by the tour operators and the ground handlers. The licensed guides compete with both the tour operator excursions and with the 'bumsters' who offer local, and sometimes more ambitious, guided products.

Each group wants to secure as much business as possible and uses a mixture of commercial acumen and regulation. Tour operators seek to secure as much of the organised sightseeing as possible for themselves, and organise it through licensed ground handlers. Resort managers, company representatives and guides earn commission on the excursions they sell, and this forms a significant part of their earnings. The ground handlers who provide the excursions on behalf of the tour operators are insured and the quality of the product is controlled through the contracts negotiated each year. If there are claims against the operator they pass these on to the ground handler, minimising their risk. The EU Package Travel Directive and national licensing regulations assist in enforcing these arrangements in the resort.

The ground handlers and the tour operators have a joint interest in securing the sightseeing business of the tourists brought to the destination by the operators. They are happy to see official licensed guides taking individuals shopping or on local walking tours as these are non-competitive products – there is no margin for the formal sector in offering these services.

The official licensed guides are trained and licensed by the government to provide guiding all over The Gambia. However, they do not have licensed transport nor are they insured to provide excursions. If they use licensed taxis, the taxi drivers are delighted whilst the ground handlers and tour operators point out that this is a breach of the regulations. If the guides use unlicensed transport the taxi drivers, ground handlers and tour operators all point out that this is unlawful and dangerous. It is the role of government to establish a framework for the regulation of the industry to resolve these conflicts, draw and enforce the boundaries of what each group may and may not legally do. There is considerable scope for using regulation and economies of scale to ensure that the formal sector remains dominant.

Both the formal sector and the informal sector approve of licensing. The formal sector sees it as a way of controlling the informal sector, for the informal sector it bestows legitimacy and reduces one form of barrier to access. However, licensing can be used to protect a market and it can disadvantage the informal sector. It is the detail that matters, as evident in the wrangling, which goes on around training, quality and the value of different courses and licenses. The 'bumsters' are seen by the formal and informal sector alike as undermining standards and undercutting the formal and informal sectors, turning 'bumsters' into licensed guides undermines the status and earnings of licensed guides.

Box 8: Identifying a consensus for action

- Dialogue between the informal and formal sector and a shared perception of the problems confronting tourism in the particular destination is essential to securing multi-stakeholder participation in change.
- Dialogue and open reporting assists in overcoming suspicions about what the formal sector is saying about the informal sector in, for example, the Welcome Meetings. The content and attitudes to the informal sector at the Welcome Meetings is a key issue as is addressing the issues of hassling and bargaining.
- Licensing is an important mechanism for legitimating the informal sector and can be a mechanism by which the formal sector can maintain a competitive advantage.

In each destination there is likely to emerge a different agenda for action, tourism is about diversity, although there is likely to be considerable overlap. Experience from The Gambia provides an example of the ways in which the formal sector of established tourism businesses can assist poor producers of goods and services to increase their sales to tourists by acting as a conduit of information about the products and services of poor producers, by enabling access and by encouraging tourists to purchase these goods and services.

It is important that the established tourism industry and government does not use regulations and standards issues to avoid competition from poor producers. The definition of complementary (non-competitive) products should not be drawn so tightly as to preclude engagement by poor producers in the industry or to make them feel ghettoised.

8.2 Building Partnerships

Tour Operators and Complementary Products

Over half (55.2%) of the visitors interviewed at hotels stated that if they chose to come back to The Gambia, they would book a package, whilst a further 34.7% would book a flight and hotel together. Less than 10% would book a flight only and almost nobody would choose to stay with a friend. It is clear that in the future tour operators will continue to have considerable influence over the activities of tourists, and the information with which they are provided about the informal sector. Improving and increasing the information that is available to tourists prior to their arrival, through brochures, is very important; as is the information and attitudes that is conveyed during Welcome Meetings.

By increasing the diversity of complementary product activities available, and by emphasising interesting nature-based tourism excursions such as sea and river fishing and bird watching, the tour operators have the opportunity to increase the size of the cake, and to assist in the sustainable development of the informal sector. The success of this strategy turns on the development of new products, which are seen as complementary rather than as competitive to those which are already offered by an existing sector.

Ground handlers can be encouraged by tour operators to engage with the informal sector in developing and selling new products, for example over-nights in villages and agricultural and village tours. The ground handlers in any destination are, like the hoteliers, committed. Their business is in the destination. The tour operators are in a fundamentally different position in two important respects:

- Large non-specialist operators who market sun, sand and sea destinations are free to switch between destinations in pursuit of price and non-price competitive advantage – no hotelier, ground handler, government or informal sector producer of goods or services can afford to ignore this market reality.
- The staff of the larger operators are deployed at the convenience of the operators – in The Gambia the turnover of staff from year to year is a major constraint in developing sufficient local expertise and commitment to secure change. It is not clear to resort managers and representatives that participation in implementing these kinds of changes is a 'career move', they have demanding jobs caring for their clients in the resort. Managers and representatives talk about this as 'doing their day job', many of them are keen to develop new products and to work with the informal sector. They can see that it makes sense, but it is voluntary activity carried on outside the 'day job'. Under current arrangements there is no material incentive for tour operator staff to engage in the development of informal sector linkages, indeed to do so will often adversely impact upon their current earnings. The integration of the informal sector will depend upon it becoming more like the formal sector and reaching a position where sales of its products and services are commissionable, part of the way tour operators and ground handlers conduct their business in the resort. .

Hotels and Local Linkages

Consistent local sourcing of products and services such as food, drink and furnishings has the potential to generate sustainable, long-term, reliable markets, and so generate increased employment and improved local revenues.

A number of the hotels already source fresh fruit and vegetables from local groups of women, and this practice could be generalized. The hotels accept that this is the best way to support the local economy and there is considerable scope for further work on this, working closely with the National Women Farmers Association. If coupled with education regarding quality control, hygiene, understanding of continuity of supply and business management, the hotel sector could improve the quality and freshness of the produce it supplies to tourists, while reducing costs and enhancing local employment opportunities.

To achieve this there needs to be:

- better linkages between hotels and restaurants and local producers;
- reassurance for the hotels and restaurants regarding health and safety (e.g. sealed drinks containers);
- access for informal sector groups with written information regarding requirements, standards and sales, variety of produce desired;

- improved local markets – use of a national co-operatives system to produce fruit and vegetables to the hotels;
- invitations to fruit sellers to sell to hotel kitchens and to guests.

Box 9: Encourage local consumption

Mechanisms to encourage the local food-producing sector, and improving the variety of attractions for tourists, could include emphasising and highlighting local cuisine. This could be done through a variety of mediums, such as:

- a cook book developed locally, which could then be sold by the informal sector, and by hotels;
- a dish of the day in restaurants;
- change the emphasis of European food in hotel menus, to more exotic Gambian cuisine;
- variation in hotel menus to adapt to the seasonal variations in local availability of produce;
- cooking competitions and regular food festivals;
- sales and tasting of local drinks, such as palm wine and fruit juices.

Box 10: Practical examples from The Gambia

- One of the major barriers encountered by the informal sector is exclusion from the formal sector. The 'What's On' notice boards being developed in the implementation phase and potential publications both overcome the dissemination of information problem and confer a level of legitimacy to the informal sector.
- Licensing and badging, backed by a code of conduct, are seen by members of informal sector groups as important mechanisms to secure access.
- Hotels can set up opportunities for craft vendors, fruit sellers and juice pressers to have access to tourists inside hotel boundaries.
- Issues of insurance need to be addressed on a case-by-case basis – the tour operator liability constraints need to be tackled but they are not as significant as is sometimes argued by the formal sector.
- All ground handlers interviewed noted that quality and public liability insurance were key criteria in granting local product and service contracts. Local licenses were also critical for three of the four ground handlers, while price and reliability were key factors for two of them. One also mentioned cleanliness as key criteria.
- Local guides can play a very significant role in facilitating informal sector access by encouraging tourists to visit rural areas and to visit local markets.
- Visitor expenditure in the informal sector is significant (one third of in-country expenditure) and it can be increased.
- Craft stall holders are keen to develop new products and to work together to counter aggressive bargaining by tourists.
- The problems experienced by the informal sector in general are mainly in access to the market, dealing with competition and commissions, and because tourists do not have adequate information about them.

8.3 Conclusion

The initiative has demonstrated how a series of relatively small changes can significantly increase the earnings of the informal sector entrepreneurs who operate on the margins of the industry, but earn their livelihood from the industry. There is considerable potential for the development of complementary products, which improve the opportunities for the poor to earn a livelihood from tourism and to be less poor, whilst at the same time producing a richer and more diverse product for the tourist. The new Gambian Tourism Authority is continuing the work begun with the DFID funded TCF initiative and has established a Responsible Tourism Partnership through which to work with the originating market tour operators, hoteliers, ground handlers and ASSET members to continue to improve the relationships between the informal and formal sectors and to continue to improve market access for the informal sector.

The lessons learned from The Gambia should be applicable in any sun, sand and sea destination where the informal sector of emerging entrepreneurs is seeking to establish itself and to sell to tourists who arrive on package tours where the tour operators provide excursion programmes. Whilst the individual gains for particular micro enterprises and sole traders are limited, it is clear that the informal sector spend by international tourists is already significant, and that there is scope for it to grow. Whilst tourism cannot solve all the problems of development in The Gambia – it can make a very significant contribution.

Box 11: Recommendations

Actions that can be taken in the originating markets primarily by tour operators:

- Educating tourists about the destination and briefing them about the opportunities that exist for them to have an even more enjoyable holiday by engaging with the informal sector is important. This can best be achieved though the guidebooks and pre-departure tour operator information and briefing meetings in the destination.
- It would be highly beneficial for operators to liaise with the informal sector in order to provide suitable advice on haggling (e.g. behaviour and prices).
- Key concerns that both UK and Gambian based tour operators shared were Health and Safety (especially food hygiene), quality and standards. Additional key factors included adequate insurance (e.g. public liability), reliability, reputation, and operational logistics.
- The accommodation providers determine linkages with their suppliers (e.g. of food, drinks, & furnishing), and the tour operators reported that they had no input into this process, and did not consider it was their place to do so. However, the operators supported the use of local food suppliers, as long as health and safety, reliability, and quality were maintained. One operator reported that it was more cost effective to use local suppliers.
- Tour operators could encourage clients to buy in the local markets and not in the hotels.
- By increasing the diversity of activities that are available, and by emphasising interesting nature-based tourism excursions such as sea and river fishing, and bird watching, the tour operators have the opportunity to increase the size of the cake

The informal sector can support this process by:

- adopting formal codes of conduct and enforcing them,
- engaging with the established private sector operators to develop new products and raise quality,
- undertaking training to develop retailing, service and production capacity and capabilities.

Government can assist this process by providing:

- identity cards and support for the poor producers associations,
- a supportive regulatory framework: one which does not make it unnecessarily difficult for poor producers to engage in the industry but which does guarantee the minimum necessary safety and security standards.

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