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Cabo Verde
The Potential of Local Experiences and Online Marketplaces to Diversify Tourism

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Disclaimer

This report was prepared by Judy Karwacki, with contributions from Helena Moscoso, in the context of the Diversifying Tourism and Strengthening Linkages through Digital Technologies in Cabo Verde Analytical work (ID: P169076). The authors' views expressed in this publication do not necessarily reflect the views *of the World Bank Group.*

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Acronyms

AAA	Airbnb Africa Academy
AAN	Association of Friends of Nature
AARP	American Association of Retired Persons
ANV	National Travel Agency
ATTA	Adventure Travel Trade Association
BTA	Bermuda Tourism Authority
CBI	Centre for the Promotion of Imports from developing countries
CBT	Community-Based Tourism
CCM	Mindelo Cultural Centre
CERAI	Center for Rural Studies and International Agriculture
CLIA	Cruise Lines International Association
CMSV	São Vicente City Council
CNAD	National Centre of Art Crafts and Design
CTE	Community Tourism Enterprises
CVE	Cabo Verdean Escudo
DGT	General Tourism Board
DGTT	General Tourism and Transports Board
DMO	Destination Marketing Organization
ENAPOR	Cabo Verde Port Authority (Empresa Nacional de Administração dos Portos)
EODB	Ease of Doing Business
ETC	European Travel Commission
EU	European Union
GDP	Gross Domestic Product
IGST	Institute of Tourism Expenditure and Satisfaction
ICT	Information and Communication Technology
IMP	Maritime Port Institute
INE	National Statistical Institute
IT	Information Technology
ITU	International Telecommunications Union
KPIs	Key Performance Indicator
MICE	Meetings, Incentives, Conferences and Exhibitions
MSEs	Micro and Small Enterprises
OTA	Online Travel Agency
P&E	Product & Experience Division (Bermuda)
P2P	Peer-to-Peer
PEDS	Sustainable Development Plan (from Plano de Desenvolvimento Sustentável)
TTCI	Travel and Tourism Competitiveness Index
U.K.	United Kingdom
UNTWO	United Nations World Tourism Organization
U.S.	United States
USTOA	United States Tour Operators Association
USAID-LENS	U.S. Agency for International Development Local Enterprise Support
VAT	Value Added Tax
WBG	World Bank Group
TTCI	Travel and Tourism Competitiveness Index
WYSE	World Youth Student and Educational Travel Confederation

1 Executive Summary

A pivotal shift in consumer sentiment about travel is taking place across the globe where people of all ages are seeking more immersive and meaningful 'local experiences' when they travel. More of these consumers are purchasing tours and activities through online marketplaces, a new distribution channel in the tourism sector.

These developments come together to create opportunities for Cabo Verde, which has a wealth of friendly local people and a diversity of communities and culture, the vital ingredients needed to create local experiences. They help to mitigate three of the main impediments Cabo Verdean entrepreneurs and MSE's (micro and small enterprises) face when they try to enter the tourism value chain: limited market access, insufficient capital, and a lack of tourism knowledge and skills.

The objective of this scoping study is to investigate the potential for Cabo Verde to develop and market local experiences through online marketplaces.

Context

Travel and tourism is one of the world's largest economic sectors. It is central to Cabo Verde's economy, contributing 46.2% of GDP in 2018.[1] Tourism arrivals to Cabo Verde have more than doubled over the past decade. However, because Cabo Verde relies on all-inclusive resort tourism, the tourism activity is concentrated in only two islands, Sal and Boa Vista. The sector is largely controlled by foreign companies and select local operators, so linkages between the tourism sector and local suppliers are weak. Entrepreneurs and MSEs have limited market access, insufficient capital, and a lack of tourism business knowledge and skills. It is difficult for them to enter the tourism value chain.

The government of Cape Verde wishes to diversify from the all-inclusive tourism model in order to foster tourism development and alleviate poverty on other islands. To this end, it has conceived the *Uma Família, Um Turista* (One Family, One Tourist Programme), which aims to provide support to rural families and micro-enterprises to enable them to develop community-based tourism (CBT) products and services.

A 2018 market research study by the World Bank Group, *Demand Analysis for Tourism in African Local Communities*, found that demand is growing for tourism experiences delivered or based in local communities in Africa. The study projected that between 2018 and 2023 bookings for CBT products would grow 10%, almost double the expected increase in overall arrivals to Africa. It estimated that CBT Experiences of less than one day comprised 17.9% of international tourist arrivals to Africa in 2018. Such short duration experiences are the focus of this World Bank study.

The online marketplaces have emerged as a new and rapidly growing distribution channel for selling short duration CBT local experiences. Between May 2017 and May 2018, bookings via online marketplaces grew from a 5% share to more than a 20% share of the total tour and activities sector.[2]

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1 Source: https://knoema.com/atlas/Cabo-Verde/topics/Tourism/Travel-and-Tourism-Total-Contribution-to-GDP/Contribution-of-travel-and-tourism-to-GDP-percent-of-GDP.

2 Why the tours & activities market needs competitive distribution. Trekksoft. Jun 11, 2018.

The World Bank and Cape Verde wish to explore the new possibilities in tourism development that have arisen by the growth of the CBT sector and the rise of the online marketplaces. Although the study is specific to Cabo Verde, it provides useful research and insights for other countries in Africa and beyond.

This definition of a local experience was prepared to guide the study: "*An activity or tour which gives guests an 'insider' view of the place visited and is hosted by a local entrepreneur, micro or small enterprise, or community group. It provides a hands-on cultural and learning experience for guests and creates socio-economic benefits for local persons, businesses and communities. It may include non-traditional activities, classes, tours and social impact experiences across multiple adventure and cultural experience niche categories. A local experience can be packaged with accommodation, transport and other tourism products and services.*"[3]

Key Findings

The study shows that a strong existing tourism market, the consumer trend to favouring experiences over things, and the increasing use of online marketplaces by consumers to purchase tours and activities combine to create good opportunities for Cabo Verde to develop local experiences and market them through online marketplaces. Taking advantage of the opportunities could help the government with its goals of diversifying away from the all-inclusive tourism market, nurturing rural tourism development, and ensuring local persons – particularly marginalized groups like women and youth -- get more of the benefits of tourism.

Local Experiences Development Potential

The mixed Portuguese and African culture roots, 'Spirit of Morebeza' (hospitality), and diverse natural and cultural assets of Cabo Verde combine to provide the ingredients needed to develop unique local experiences. The most promising theme areas for Cabo Verde include 1) Food and dining experiences, such as where locals meet visitors at a restaurant or other food venue to break bread together and share about Cabo Verde's culture. 2) Music experiences like taking guests to venues and sharing information about local music and musicians. 3) Active experiences around sport or exercise, such as where a host takes a guest on a hike or to a local sporting event and combines it with sharing of the culture. 4) Arts & Culture experiences like taking visitors to meet artists or artisans or to taking them to local artisan markets.

Sal and Boa Vista are the priority locations for developing new local experiences because they receive the lion's share of tourism (more than three-quarters of visitor arrivals and over 90% of hotel nights in 2018). Mindelo, which is the cultural capital and main cruise port of Cabo Verde, is another priority location.

Demand for Local Experiences

Typically, the online marketplaces list local experiences under the historical/cultural tour and activities category. Based on research from the study, estimates were developed of the potential demand for and value of these types of tours and activities for the period from 2018 to 2023. As shown in the table below, the projections are hypothetical but provide a sense of what the market demand might be if there were more historic and cultural tours available in Cabo Verde. They indicate there is considerable unmet demand.

[3] Source: Created by Judy Karwacki, World Bank consultant.

Estimated Demand for and Value of Historic/Cultural Tours in Cabo Verde: 2019-2023					
	2019	**2020**	**2021**	**2022**	**2023**
Total Tourist Arrivals[1]	799,124	827,892	857,696	888,573	920,562
Cabo Verde Leisure Tourist & Cruise Visitors					
Leisure Tourists (94.2% of Tourist Arrivals)[2]	752,775	779,874	807,950	837,036	867,169
Cruise Visitors[1]	48,789	50,546	52,365	54,251	56,204
Total Leisure Tourists and Cruise Visitors	*801,564*	*830,420*	*860,315*	*891,287*	*923,373*
Potential Demand for Historic/Cultural Tours (14.5% of Total Leisure Tourists & Cruise Visitors)	**116,227**	**120,411**	**124,746**	**129,237**	**133,889**
Conservative Value of Historic/Cultural Tours US$ (US$23 per person average price)[3]	**$2,673,216**	**$2,769,452**	**$2,869,152**	**$2,972,441**	**$3,079,449**
Optimistic Value of Historic/Cultural Tours US$ (US$50 per person average price)[4]	**$5,811,339**	**$6,020,547**	**$6,237,287**	**$6,461,829**	**$6,694,455**

See Section 8.3.1 for detailed projections

Marketing Potential of the Online Marketplaces

The research and analysis conducted shows that online tours and activities marketplaces provide excellent marketing channels for selling Cabo Verdean local experiences. With rapid growth in listings and bookings in recent years, the marketplaces are becoming an increasingly important marketing channel. Currently, Cabo Verde has a presence on only one of the main online marketplaces, which places the country at a competitive disadvantage. As a priority, Cabo Verde should work with AirbnbExperiences, which is the only marketplace that works with both non-professional and professional suppliers of experiences. TripAdvisorExperiences (Viator) and GetYourGuide, the two largest online marketplaces, are also important marketplaces, but they work only with professional suppliers.

Challenges for Developing and Marketing Local Experiences

The table below shows challenges that could hamper Cape Verdean entrepreneurs and MSEs in developing local experiences and participating in the online marketplaces.

Challenges for Developing and Marketing Local Experiences	
Government policies and regulations hamper ease of doing business.	Suppliers may lack ICT literacy and skills.
Financial system and services may constrain the use of online marketplaces.	Internal transport systems and services hamper tourism development.
Licensing of tourism businesses can be complicated and challenging.	Cabo Verde tourism administration lacks the technical and financial capacity to support tourism development.
Inadequate skills and qualifications limit business development.	Gender inequality may affect women's ability to take advantage of the opportunities.
Impediments exist in ICT capacity and quality.	Cabo Verde's destination marketing program is weak.

Supporting the Development of Local Experiences

Cabo Verde needs an experience development program to support the development of a portfolio of market ready[4] local experiences. Such a program would provide training, coaching and support to suppliers in a range of areas from ICT basic skills to accounting, how to develop experiences, and how to market experiences using the online marketplaces. The study has case studies that overview two such programs: the Bermuda Tourism Authority's Product &

[4] Market ready means that the quality and consistency of the experiences is of a high standard.

Experiences Division and the Airbnb Africa Academy program. Cabo Verde can learn from and adapt models such as these.

Recommendations

The following recommendations are intended to help the government of Cabo Verde address the challenges and take advantage of the opportunities identified by this study.

1) Enabling Environment: Recommended actions to help establish an enabling environment and national framework that facilitates and accelerates Cabo Verde's success in local experiences development and online marketing include: developing a licensing scheme that accommodates non-professional suppliers of experiences; establishing an experience development program to providing on-going technical and financial support to suppliers; improving ICT access for suppliers, and addressing financial services gaps and challenges that might prevent suppliers from participating in the online marketplaces.
2) AirbnbExperiences Program: Cabo Verde should immediately establish a partnership with AirbnbExperiences to support the development of locally-hosted experiences by non-professional tourism suppliers. This partnership also would benefit more professional tour and activity suppliers. The recommendations include having a pilot program modelled on Airbnb's Africa Academy model but adjusted to meet Cabo Verde's needs. Also, a tax and marketing agreement should be negotiated, which would support the launch of AirbnbExperiences in Cabo Verde and on-going joint destination marketing.
3) Online Presence and Other Marketplaces: A partnership also should be established immediately with TripAdvisorExperiences (Viator), the world's largest online tours and activities marketplace. Only professional tourism suppliers can list their products on this online marketplace. GetYourGuide, the largest online tours and activities marketplace in Europe and the second largest marketplace in the world, is another important partner for Cabo Verde.
4) Putting Cabo Verde on the Digital Map: To establish a strong online presence for the destination and drive business to the suppliers of local experiences, Cabo Verde must take advantage of the marketing opportunities available from Google, TripAdvisor, and Facebook such as free business listings for suppliers and paid destination marketing programs.
5) Experience-Driven Destination Marketing: While online marketplaces are an increasingly important distribution channel, they still comprise only a small share of the global experiences market. Also, the best market for Cabo Verdean experiences is the adventure travel market, which is small in size but has growth potential given the large nearby European market. Therefore, Cabo Verde should adopt an experience-driven destination marketing approach using digital marketing and analytics combined with more traditional marketing tactics like media relations and travel trade marketing.

2 Introduction

Tourism development can bring many economic opportunities for poor and marginalized communities and individuals, helping to alleviate their poverty and hardship. However, it is difficult for entrepreneurs and MSEs (micro and small enterprises) in Cabo Verde to enter the tourism chain. Three of the main impediments faced by Cabo Verdean entrepreneurs and MSE's face are limited market access, insufficient capital, and a lack of tourism business knowledge and skills. Local micro and small enterprises are not participating sufficiently in tourism services or involved in the related supply chains, and a relatively small portion of the money spent by tourists trickles down to local communities.

Two related developments in the tourism sector combine to provide the potential to lessen or overcome these market barriers, bringing more tourism linkages and benefits to local communities. These developments are the experiential travel trend and the rise of online marketplaces that sell tours and activities.

More of today's consumers are placing value on experiences, rather than things. Expedia research on multi-generational travel trends found that 74% of consumers now prioritize experiences over things. Travelers of all ages are looking for experiences on their trips.[5] They do not want to go sightseeing or have regular tours and activities. They seek immersive experiences that allow them to learn about and connect directly to the local people and place. They want to feel their time and money are well spent while on vacation.

These market dynamics create a demand for 'local experiences'. Section 2.3 describes and defines local experiences. Briefly put, these are tours or activities of less than a day that led by a local person which give the traveler a hands-on cultural and learning local experience. Such local experiences can often be developed with little or no tourism know-how, infrastructure or equipment so entrepreneurs and MSEs can more easily enter the tourism chain with these products.

On the distribution side, just as there are websites such as Expedia and Orbitz that sell hotel stays and airline tickets, there are now online marketplaces for tours and activities. They provide a direct-to-consumer sales channel for entrepreneurs and MSEs to sell local experiences. There are peer-to-peer (P2P) marketplaces, where local people offer local experiences and their special skills directly to travelers. The best-known ones include Airbnb Experiences, GetYourGuide and WithLocals. There are also online travel agencies, or OTAs, which sell local tours and activities offered by professional tour suppliers. The best-known ones include TripAdvisorExperiences (which includes Viator) and Expedia Local Expert.

The online marketplaces are growing rapidly because as consumers are more comfortable with purchasing travel online and increasingly using mobile devices to do so. Using the marketplaces enables entrepreneurs and MSEs to market their local experiences to reach millions of people without having an e-commerce capable website or dealing with payments directly.

[5] Generations on the Move. Expedia. 2018.

The two developments come together to create opportunities for emerging destinations. The objective of this study is to investigate the potential for Cabo Verde to develop and market local experiences through online marketplaces. The four main questions addressed are:

- Does Cabo Verde have the potential to develop high-quality local experiences, what types of experiences could be developed?
- What is the market demand for local experiences in Cabo Verde?
- How can such local experiences be marketed using online tours and activities marketplaces, such as AirbnbExperiences, GetYourGuide and TripAdvisorExperiences (Viator)?
- How can the development of local experiences by Cabo Verdeans be fostered?

2.1 Methodology and Outcomes

A mix of primary and secondary research was conducted to investigate the potential for Cabo Verde to develop and market local experiences through online marketplaces:

- A field mission was conducted, which involved rapid assessment visits to four islands: Sal, Santo Antão, Santiago, and São Vicente. Select tourism sites were visited and interviews conducted with key private and public tourism stakeholders on these islands (see Annex 12 for a list of meetings). The study focuses mainly on these four islands.
- Primary research was done by phone and online meeting platforms to collect information about several of the main online marketplaces.
- Primary and secondary research was conducted to gain insight into tourism demand and supply trends in Cabo Verde.
- A benchmarking assessment was prepared that compares Cabo Verde's online presence on several main online marketplaces to the presence of competitive destinations, which were the Azores, the Canary Islands, Madeira and Mallorca.
- Case studies were conducted to gain insight into how local experiences are developed in two destinations, Bermuda and South Africa (Cape Town).

The research conducted was not comprehensive due to project resource and duration constraints. Within the limitations, the study provides insight about the online marketplaces landscape, and the opportunities that tourism focused on local experiences and online marketplaces brings for Cabo Verde. It also provides market-based recommendations that can be used by Cabo Verdean destination managers to formulate a detailed action plan.

3 Why Focus on Local Experiences?

3.1 The Global Tourism Trends

Travel and tourism is among the biggest and fastest-growing economic sectors in the world. It is one of the main sources of income for developing countries, including Cabo Verde. In 2018, international tourist arrivals grew by 6% to 1.4 billion. This number is expected to rise to 1.8 billion arrivals by 2030.[6]

Tourism is closely linked to development and improving socio-economic conditions. Local communities are benefitting from the trend to experience-driven travel, which has been rising in recent years.

In 2001 the UNWTO first identified the experiential tourism trend. Since then, interest has greatly increased for local experiences, authenticity, well-being, community and engagement. For example, the U.S. Tour Operators Association (USTOA) annual member surveys confirm the experiential travel or the 'E-Factor' is a growing travel trend. For 2012, over half (52%) planned to offer new experiential programs.[7] By 2018, eighty-two percent art and culture travel experiences, two-thirds offered romance ones, 63% offered adventure ones, and 56% offered family/multi-generational experiential programs.[8]

On a regional level, a 2018 market research study by the World Bank, *Demand Analysis for Tourism in African Local Communities*, concluded that there is growing demand for tourism experiences delivered or based in local communities in Africa. It projected that bookings for these products would grow 10% by 2023, which is almost double the expected 5-7% increase in overall arrivals to Africa. For 2018, the estimated number of community-based tourism visitors was 2.8 million — and the number could top 3.0 million in five years.

Experiential activity categories are among the fastest-growing ones on the online marketplaces. In 2018, TripAdvisorExperiences (includes Viator), the largest digital marketplace for tours and activities, had the most global growth in historical and heritage tours bookings (125%). The cooking classes and food tours categories grew by 57% in bookings each.[9] In 2018, AirbnbExperiences, which has a specific category for "Social Impact Experiences", worked with more than 1,000 non-profit local hosts.[10]

The global and regional trends indicate that tourism development focused on local experiences and the tours and activities marketplaces holds promise for developing countries like Cabo Verde.

3.2 Local Tourism Development in Cabo Verde

In 2018, tourism accounted for 46.2% of Cabo Verde's Gross Domestic Product (GDP)[11], more than any other sector. Tourist and cruise visitor arrivals have more than doubled from 300,000

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[6] International Tourism Results 2018 and Outlook 2019. January 2019. UNWTO.

[7] USTOA Travel Trends for 2012, https://www.ustoa.com/images/items/156.pdf

[8] USTOA 2019 Travel Trends. https://www.ustoa.com/press-releases/ustoa-membership-contributes-19-billion-travel-industry

[9] 2018 Travel Trends Report: Experiences, Tours & Activities. TripAdvisor. https://www.tripadvisor.com/blog/travel-industry-tourism-trends-attractions-activities-experiences-2018/

[10] Airbnb Doubles Down on Experiences. Airbnb Newsroom. February 2018.

[11] See https://knoema.com/atlas/Cabo-Verde/topics/Tourism/Travel-and-Tourism-Total-Contribution-to-GDP/Contribution-of-travel-and-tourism-to-GDP-percent-of-GDP.

in 2008 to 818,000 in 2018,[12] an average annual increase of 15.6%. However, as the World Bank's Systematic Country Diagnosis report for Cabo Verde points out, the trickle-down effects of tourism are weak. The core problem is that Cabo Verde is a sun and sea tourism destination and a 90% market share of the tourism takes place on two islands, Sal and Boa Vista. The sector is largely controlled by foreign companies and select local operators. The dominant foreign company is the TUI group, which uses a vertically-integrated business model that includes providing flight, hotel, cruise, tours and activities, and ground transport services for their Verde clients. The all-inclusive resorts, which import most of their goods, dominate the hotel sector. Due to these characteristics, the linkages between the tourism sector and local suppliers are weak. MSEs are not well-integrated into the tourism value chain.[13]

The government of Cape Verde recognizes the deficiencies of the tourism sector and wishes to become a more sustainable tourism destination. The vision of the National Sustainable Development Plan (PEDS) aligns with the United Nations' 2030 sustainable development agenda and goals. Two of the priority hubs, or platforms, upon which the country’s future economic growth is based, depend on sustainable tourism development. These are "inclusive tourism that is based on Cape Verde's natural and cultural heritage" and "benefits all Cabo Verdeans and promoting ethnic tourism".[14]

To support sustainable tourism development, the Government has conceived a rural tourism development program, the *Uma Família, Um Turista* (One Family, One Tourist Programme). The aim is to alleviate poverty and create economic opportunities in rural communities through tourism. The program will provide support to rural families and micro-enterprises to enable them to offer community-based tourism products and services like homestays, food and beverage services, guided tours, trekking, artisan products, transport, and ICT and marketing services. Women in rural areas are to be the principal beneficiaries.[15] The government is now seeking investors to support the implementation of the program and has released a report which includes the program concept. A lack of financial resources is one of the biggest challenges that inhibits the government's ability to undertake tourism development.[16]

3.3 Definition of a Local Experience

The World Bank's *Demand Analysis for Tourism in African Local Communities* identified four main types of community-based tourism products, as shown in Table 1. The types of local experiences sold typically fall into the category of CBT Experience (2-3 hours, ½ day or 1-day trip). This type of CBT product, which was estimated to have a 17.9% market share of total International Tourist Arrivals and CBT Visitors to Africa in 2018, is the focus of this study.

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[12] Instituto Nacional de Estatística INE. 2019.

[13] WBG Systematic Country Diagnosis, Cabo Verde. World Bank. 2018.

[14] Strategic Plan for Sustainable Tourism Development (Tourism PEDS). 2018. https://peds.gov.cv/caboverdef4dev/wp-content/uploads/2018/12/TOURISM-Sector-PRINT_web.pdf

[15] Tourism Sector Development Programmes. Government of Cape Verde. January 2019.

[16] Strategic Plan for Sustainable Tourism Development for 2018-2030 (Tourism GoPeds). Official Bulletin. Government of Cabo Verde. Wednesday, January 9, 2019 I Series Number 2.

Table 1 Main CBT Product Types

CBT Trip Type:	**CBT Experience (17.8%)***	**CBT Experience & Accommodation (8.9%)***
Duration	2-3 hours, ½ day or 1-day trip	1 – 3 + nights
Details	Often departs from a tourism hub or hotel. Experiences include village walks, meeting local people over food & drink, cooking & handcraft classes, events and festivals, guided trips to see wildlife or local places.	Stay with a local community in a home or accommodation in the community. Also visits to community-led projects in protected areas. Participate in activities such as cooking, handicrafts, harvesting, animal care, festivals.
CBT Trip Type:	**CBT Experience Multi-Day Tour (19.6%)***	**CBT Volunteering Adventure (53.5%)***
Duration	1 – 2 weeks	Any length
Details	Usually booked ahead of time. Guided or self-guided. Has CBT elements within a wider trip, e.g., hiking holiday, staying overnight with local families and communities, eating local food and immersion in cultural. Includes other non-CBT hotels and activities.	Volunteer or internship projects like helping communities to build infrastructure, teaching languages or sports, conservation projects, healthcare initiatives. Popular among "gap" year students and people taking a career break.

* Estimated market share of total International Tourist Arrivals and CBT Visitors to Africa in 2018.
Source: Demand Analysis for Tourism in African Local Communities. World Bank Group. 2018.

Such local experiences fall within the Activities and Tours categories of the global tours, activities and attractions sector.[17] They can revolve around an event or an attraction. They can be packaged with local transportation or accommodation.

Within the global Activities and Tours categories, local experiences tend to fall into culture and soft adventure sub-categories like food, music, art, history, outdoor and sports experiences.

A defining characteristic of a local experience is that it gives guests an "insider" or "special" view of the destination. Another defining characteristic is that the experience is led by a knowledgeable local host or guide. Typically, it offers a hands-on tour or activity. Examples of local experience types include:

- A special tour or experience that shares local culture, customs or cuisine, and which the visitor could only get with a local.
- Giving the visitor special access, such as a backstage pass or “behind the scenes” access to local culture.
- Giving visitors a chance to learn how to do a local activity or skill.

The hosts of local experiences can be entrepreneurs, MSEs or community groups that have no tourism background or experience but which have a local experience or skill that provides special access to the destination. Communities or non-profit organizations might offer an experience that give visitors the chance to make a meaningful social impact contribution. Examples of local experiences provided by such non-professional tourism suppliers come from the Airbnb Africa Academy, a program aimed at developing community-led tourism in Africa which is supported by the World Bank. The program works with local hosts to help them develop and market unique local experiences, such as the following:[18]

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[17] The five sectors of the tours, activities and attractions sector are: tours, activities, events, attractions and (local) transport.

[18] Visiting Africa? Consider Community-Led Tourism So Your Dollars Will Make A Difference and Your Memories Will Be One-Of-A-Kind.

- "Township to Towns Art Walk" through the township of Langa, where travelers walk with a local community builder and art enthusiast and visit homes of community members who have set up makeshift galleries for local artists.
- “Paddle with the Penguins” in Cape Town is conducted by AfriOceans Conservation Alliance. Guests kayak with African penguins and learn about the marine environment.
- “Authentic downtown Joburg stroll,” is a guided walk conducted by a local youth organization that goes through inner-city neighborhoods in Johannesburg.

Based on all of the above, Table 2 summarizes the characteristics of a local experience. Table 3 then gives the definition of a local experience used in this study.

Table 2 Characteristics of Local Experiences

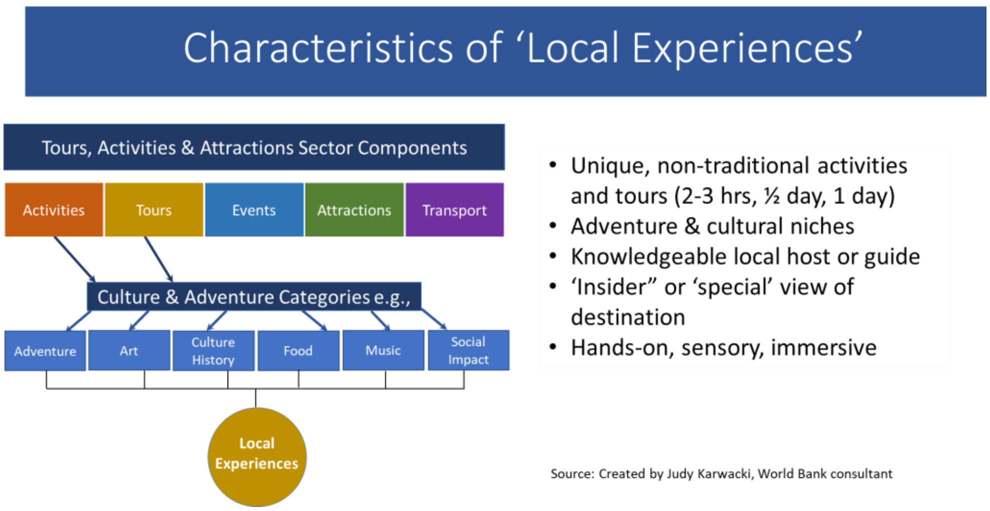

Table 3 Project Definition of a Local Experience

Project Definition of ‘Local Experience’

An activity or tour which gives guests an 'insider' view of the place visited and is hosted by a local entrepreneur, micro or small enterprise, or community group. It provides a hands-on cultural and learning experience for guests and creates socio-economic benefits for local persons, businesses and communities. It may include non-traditional activities, classes, tours and social impact experiences across multiple adventure and cultural experience niche categories. A local experience can be packaged with accommodation, transport and other tourism products and services.

Source: Created by Judy Karwacki, World Bank consultant

4 Online Marketplaces for Tours and Activities

4.1 The Maturing Online Market for Tours and Activities

In traveler spending, the global tours, activities and attractions sector was valued at $150 billion in 2019. It is the fastest growing sector of the travel industry. The online booking share of the sector is predicted to nearly triple from $10 billion in 2014 to $27 billion by 2020.[19] This rapid growth due to several main factors:

- **Travelers are already familiar and comfortable with booking online.** In 2018, eighty percent of people from the U.K., France and Germany surveyed by Arival, which conducts extensive research on the tours and activities sector, said they book travel online some or all of the time.[20] Online booking participation rates are expected to become climb higher because younger travelers are more tech-savvy and constantly connected to social media, making them more inclined towards online travel services.[21]
- **Mobile technology has become a preferred way for consumers to access the internet.** More consumers are using their mobile devices like smartphones[22] or tablets to purchase tours and activities. In 2018, Skift research found that 35% of travelers had used mobile phones to book a tour or activity while already in destination for their trip. Meanwhile, Phocuswright found that 38% of bookings were made on the same day or two days before the tour or activity takes place.[23] And Google reports that most of these last-minute bookings take place on mobile phones.[24] Mobile applications are now the priority for the online tours and activities marketplaces. In 2018, most of the growth in online bookings came from mobile platforms.[25]
- **Over two-thirds of tour and activity suppliers are now selling their products online, including through direct booking on their websites and online marketplaces.** A 2018 survey of suppliers by Trekksoft, the largest provider of online booking software to tour and activity operators in Europe, found that 65% of suppliers were selling tours direct on their websites and over 20% were selling through online marketplaces.[26] Phocuswright surveys of European suppliers found that over 80% of suppliers expected sales through these distribution channels to increase more than other channels in 2019.[27] One of the main reasons that suppliers are getting online is that many new start-ups have emerged that are offer the reservation technology software that small

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[19] Tours & Activities Come of Age: The Global Travel Activities Marketplace 2014-2020. Phocuswright. 2017

[20] European Consumer Travel Report 2018. Phocuswright. 2018.

[21] Online Travel Market is Estimated to Generate $1,091 Billion, Globally, by 2022. Allied Market Research. 2017.

[22] Smartphones combine a mobile phone and a handheld computer into a single device and give users the ability to access the Internet and purchase goods and services, including tours and activities.

[23] Last Minute Booking Trends for Tours and Activities. Trekksoft. Jul 7, 2017. https://www.trekksoft.com/en/blog/last-minute-booking-trends-for-tours-and-activities-infographic

[24] Tours and Experiences: The Next Great Untapped Market in Online Travel. Skift. Sep 18, 2018.

[25] Growth of Online Travel Market Sets Stage for Phocuwright Europe. Phocuwright. January 2019.

[26] The Future of Consumer Booking. Trekksoft. 2018.

[27] European Consumer Travel Report 2018. Phocuswright. 2018.

tour and activity businesses need to be able to manage inventories and sell their products these online channels.

- **Investments, mergers and acquisitions and start-ups are driving the rise of online marketplaces for tours and activities.** Between May 2017 and May 2018, bookings via online marketplaces grew from a 5% share to more than a 20% share of the tour and activities sector.[28] These marketplaces have been growing quickly in recent years as some of the largest online companies enter the sector. In 2014, TripAdvisor acquired Viator (now renamed TripAdvisorExperiences), the largest online tours and activities marketplace. AirbnbExperiences was launched in 2016, which brought the concept of experiences to the fore. Other leading marketplaces like Expedia, GetYourGuide, Booking.com, Klook and Musement have been investing in expanding their tour and activities operations and in acquisitions.[29] Start-up online marketplaces have raised US$1.8 billion from investors just since 2017.[30]

4.2 Types of Online Marketplaces for Tours & Activities

The line is blurring between the two types of online marketplaces for tours and activities, which are peer-to-peer marketplaces and OTAs, because both sides are moving into each other's product areas. The OTAs have moved into selling more local experiences, and the P2P marketplaces are selling more mainstream tours and activities. However, there are differences:

- OTAs are 3rd party agents that resell tours and activities. The largest and best-known one is TripAdvisor Experiences (includes Viator). Others include ExpediaLocalExperts, Booking.com, and Klook. They work with professional tour and activity suppliers.
- P2P marketplaces are platforms where local tour guides or “hosts” sell tours or experiences directly to travelers. The best-known ones are AirbnbExperiences and GetYourGuide. P2P marketplaces rely on 'platform technology', a technology that allows everyone to become buyers and sellers. Table 4 illustrates how platform technology works for selling tours and activities.

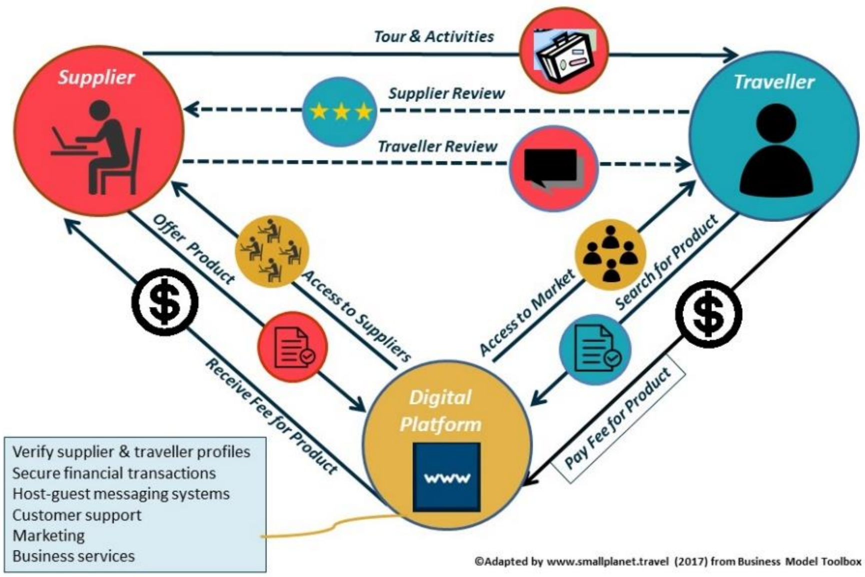
The sections following Table 4 look at the main P2P marketplaces and OTAs relevant to Cabo Verde. These marketplaces all have a strong focus on tours, activities and attractions. They were chosen based on size (number of listings) and main customer markets (both for listings and customers). (Annexes 1 and 2 have more detailed profile information on the marketplaces).

[28] Why the tours & activities market needs competitive distribution. Trekksoft. Jun 11, 2018.

[29] 1) The Real Revolution in Tours & Activities. PhoCusWright. May 2017. 2) Why Everybody Now Wants a Piece of the Tours & Activities Sector. Skift. April 24, 2019.

[30] The Top 43 Tours & Activities Startups by Funding. Arival. July 30, 2019.

Table 4 How P2P Marketplaces for Tours & Activities Work



4.3 Dominant Marketplaces

The situation is constantly changing as some of the largest online travel companies compete for dominance in the online tours and activities sector. However, a Skift analysis of major marketplaces in March 2018 provides a sense of how the major P2P marketplaces and OTAs compare. It looks at regional listings and approximate market share. It found there were six market leaders. TripAdvisorExperiences (Viator) was first with 55% of the 70,000 listings that Skift collected. It had more than double the listings as GetYourGuide, which had 20% of the listings. ExpediaLocalExpert had 8,300 listings (12%). At the time, AirbnbExperiences had only 4,400 listings, only 6% of the total. Klook, the leading tours and activities marketplace for Asia market, came in at 4%. Peek, a software vendor that has its own marketplace, had 3% of the listings.

4.4 Leading P2P Marketplaces

4.4.1 AirbnbExperiences

AirbnbExperiences is not the largest tours and activities marketplace, but it is growing quickly. It launched in November 2016 with 500 one or two-day excursions in 12 cities. Experience bookings grew 2,500% during 2017, which is 25 times faster than Homes bookings did in the first year.[31] As of April 2019, there were over 30,000 Experience listings in over 1,000 cities.[32]

[31] Airbnb Doubles Down on Experiences. Airbnb Press Room. Feb 23, 2018. https://press.airbnb.com/airbnb-doubles-down-on-experiences-expanding-to-1000-destinations-and-adding-new-categories-in-2018/

[32] 1) Airbnb Is Doubling Down on Experiences. Skift. Apr 23, 2019. https://skift.com/2019/04/23/skift-forum-europe-airbnb-is-doubling-down-on-experiences/ 2) Airbnb Says Its Tours and Activities Gamble Is Winning. Skift. Apr 30, 2019. https://skift.com/2019/04/30/airbnb-says-its-tours-and-activities-gamble-is-winning/

The term "experiences" instead of "tours and activities" became popular in the travel sector after AirbnbExperiences was founded.[33]

AirbnbExperiences is an important marketplace for Cabo Verde because it focusses on local experiences offered by local hosts. It is the only marketplace that works with non-professional tourism suppliers, although some of their hosts do own or work for professional operators. Hosts are required to self-attest that they meet local rules and regulations, but they do not have to prove they are professional tours and activities suppliers, which is the case with other marketplaces. (Annex 1 provides more information on Airbnb's responsible hosting guidelines.)

However, AirbnbAdventures www.airbnb.ca/b/adventures, which launched in June 2019, with 200 multi-day experiences, is different. Hosts must be able to prove that they have appropriate certifications, training and access to medical services if they offer activities that may require special skills or certifications.[34]

Another reason AirbnbExperiences is an important marketplace is that it is the only one that provides experience protection liability insurance for hosts.[35] This is an important advantage for local experience suppliers since such insurance is costly and difficult to obtain in Cabo Verde.

The AirbnbExperiences model enables local people who are passionate about a subject or theme or who have deep knowledge or a skill of some kind to sell an experience even though they have no prior tourism experience. It allows non-professional local tourism entrepreneurs and MSEs in destinations like Cabo Verde to more easily enter the tourism value chain. Airbnb has entered into partnership agreements with several destinations aimed at supporting community development through the development of local experiences. One of these, the Africa Academy, which is supported by the World Bank Group, is described in Section 4.2.

AirbnbExperiences guests are specifically looking for local experiences. In a survey of more than 200,000 guests in 2019, the majority (96%) said getting a more local, authentic experience was a factor for booking. Another advantage is that Airbnb can cross-sell experiences to the millions of customers that visit Airbnb websites and buy Airbnb Homes lodging.[36]

AirbnbExperiences differs from competitors in that it curates its Experience listings. Many experiences are not approved, especially on the first submission. It looks for unique experiences, especially ones that play into the main passions of travelers like food, music, animals, or wellness. Airbnb is taking steps to develop the most popular categories of Experiences. These include Airbnb Social Concerts, Social Dining and Social Impact Experiences.

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[33] TripAdvisor Attractions Unit Will Rebrand as Experiences. Skift. Apr 2018. https://skift.com/2018/04/18/tripadvisor-attractions-unit-will-rebrand-as-experiences

[34] What is an Airbnb Adventure? Airbnb Blog. No date. https://blog.atairbnb.com/what-is-an-airbnb-adventure/

[35] For details, see https://www.airbnb.ca/experience-protection-insurance.

[36] 1) Airbnb Is Doubling Down on Experiences. Skift. Apr 23, 2019. https://skift.com/2019/04/23/skift-forum-europe-airbnb-is-doubling-down-on-experiences/ 2) Airbnb Says Its Tours and Activities Gamble Is Winning. Skift. Apr 30, 2019. https://skift.com/2019/04/30/airbnb-says-its-tours-and-activities-gamble-is-winning/

In early 2019, category lead positions were put in place to build inventory in key themes including Food and Drink, Entertainment, and Animals.[37]

4.4.2 Other Key P2P Marketplaces

There are three other main P2P marketplaces relevant for Cabo Verde:

- GetYourGuide[38] – GetYourGuide is a major player that focuses on Europe, making it important for Cabo Verde. It has raised almost US$700 million in funding in recent years, including a US$484 funding round in May 2019. With 36,000 listings, it is the second largest of all the tours and activities marketplaces, behind TripAdvisor Experiences (Viator). It sold US$10 million in tours between June 2018 and March 2019 compared to only US$15 million in sales during the previous decade. In 2018, it began to sell its own branded "GetYourGuide Originals" tours. These tours are developed in partnership with tour operators.
- ToursByLocals – also founded in 2008, is another one of the first companies to use a P2P platform to connect local guides and travelers. It has 10,000 tours and activities in 159 countries, and many of its customers are from North America.[39]
- WithLocals – with only 2,000 listings, WithLocals is a small peer-to-peer marketplace. It is Netherlands-based and Europe-focussed, making it relevant for Cabo Verde.

4.4.3 Listing Policies of P2P Marketplaces

Annexes 1 and 2 have details on the listing policies of all four of the P2P marketplaces discussed in this section. The main points are:

- All four of the marketplaces have commission rates of between 20% and 30%.
- They require suppliers of tours and activities to meet certain legal requirements for their areas.
- With the exception of AirbnbExperiences, suppliers must be licensed professional guides or tourism businesses.
- Some of the marketplaces require suppliers to provide proof of public liability insurance. (As stated earlier, AirbnbExperiences provides experience protection insurance for qualified Airbnb hosts, an important advantage for local suppliers.)

4.5 Leading OTA Marketplaces

The major OTAs tend to offer more mainstream tours and attractions. However, recognizing the trend to experiences, they now offer more peer-to-peer and local experiences. The OTAs are important because of their dominance in the global marketplace. They have millions of

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[37] 1) Airbnb Doubles Down on Experiences. Airbnb Press Room. Feb 23, 2018. https://press.airbnb.com/airbnb-doubles-down-on-experiences-expanding-to-1000-destinations-and-adding-new-categories-in-2018/. 2) Airbnb Says Its Tours and Activities Gamble Is Winning. Skift. Apr 30, 2019. https://skift.com/2019/04/30/airbnb-says-its-tours-and-activities-gamble-is-winning/

[38] 1) GetYourGuide Defies Conventional Wisdom on Tour Booking So Far. Skift. Apr 8, 2019. https://skift.com/2019/04/08/getyourguide-defies-conventional-wisdom-on-tour-booking-so-far. 2) GetYourGuide Nabs $484M Series E round, May 16, 2019. https://www.phocuswire.com/GetYourGuide-484-million-series-E?oly_enc_id=1127B4689290I3V 3) GetYourGuide on being a startup and doing things differently. Phocuswright. Mar 18, 2019. https://www.phocuswire.com/GetYourGuide-interview-Berlin-2019?ctxp=3)

[39] https://en.wikipedia.org/wiki/ToursByLocals

customers, many of whom are interested in local experiences. For Cabo Verde, TripAdvisorExperiences (Viator) and Booking.com are the most relevant of the main OTAs.

4.5.1 TripAdvisorExperiences (includes Viator)

When TripAdvisor purchased what was then Viator in 2015 it was already the largest tours and activities online marketplace. It remains the largest today. The OTA's total revenue for its experiences and dining segment in 2018 was US$372 million, which could put its gross bookings between US$1.5 billion and US$2 billion.[40]

In May 2018, TripAdvisor rebranded Viator as TripAdvisorExperiences, reflecting an increased emphasis on peer-to-peer and local experiences. Many of the tours listed on the platform now include "small group" in the title.[41]

With the heavy investment by TripAdvisor, tour and activities listings have been growing quickly. In 2018 alone, there was a 60% increase in tour suppliers and a 90% increase in listings, to a total of 159,000 listings. By May 2019, the number of listings grew to 202,000. The rapid growth is driven in large part by TripAdvisor's purchase in 2018 of Bokun, an online booking management software company for tour operators.[42]

TripAdvisorExperiences (Viator) is also important for Cabo Verde because the Africa & Middle East region is one of the top three regions for listings, with 12% of tour and activity inventory in 2018. Only Europe and (37%) Asia (30%) have more listings.[43]

4.5.2 BookingExperiences[44]

Booking.com, the largest online travel company overall, has moved into the tours and activities sector. Their research shows 62% of travelers want to experience new cultures, 51% want to taste local delicacies, and 39% embrace meeting new people. In 2017, Booking started to offer tours and activities to some customers who had purchased hotels in select major European, Asian and U.S. cities. In 2018, it purchased FareHarbour, a leading online booking management software provider for tours, which is said to have 5,000 suppliers. In May 2019, Booking started to work with rival software suppliers for tours. These moves are allowing Booking.com to grow and diversify their product listings quickly.

As BookingExperiences becomes more established, it could become an important marketplace for Cabo Verde. It dominates the European online hotel booking market, giving it the ability to cross-market tours and activities to millions of lodging customers. Also, Booking.com is

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[40] The Biggest OTA You've Never Heard Of. Arival. Sep 19, 2019.

[41] 1) Tours and Experiences: The Next Great Untapped Market in Online Travel. Skift. Sep 18, 2018. 2) TripAdvisor Attractions Unit Will Rebrand as Experiences. Skift. Apr 2018. https://skift.com/2018/04/18/tripadvisor-attractions-unit-will-rebrand-as-experiences

[42] TripAdvisor Reveals Some of Its Tactics in Growing Experiences. Skift. May 8, 2019.

[43] OTA giants: Viator vs Expedia Local Expert comparison. TrekkSoft, April 4, 2018. https://www.trekksoft.com/en/blog/viator-vs-expedia-local-expert.

[44] 1) Booking Drops Hotel Requirement to Book Tours and Activities. Skift. May 15, 2019. https://skift.com/2018/04/18/tripadvisor-attractions-unit-will-rebrand-as-experiences 2) Lost in translation? Booking.com research exposes surprising gap between travel ambitions and reality. https://globalnews.booking.com/bookingcom-research-exposes-surprising-gap-between-travel-ambitions-and-reality/

committed to sustainable tourism development. It has a well-regarded training program for suppliers providing homestays. It has launched Booking Booster, which supports start-up businesses in sustainable tourism, and the Booking Cares Fund, which supports non-profit sustainable travel projects. These programs suggest that BookingExperiences will emphasize peer-to-peer type tours and activities as it grows.

4.5.3 Other OTAs

Other OTAs with future potential for Cabo Verde are:

- ExpediaLocalExpert[45] – Expedia, the world's second largest online travel company, launched LocalExpert in 2015. It sold US$500 million worth of tours and activities in 2017. So far, Expedia has not taken significant steps to expand this unit, but it continues to say that it is serious about the sector and plans to step up its efforts.
- Musement[46] – In 2018, this Italy-based OTA was purchased by TUI, which has a customer base of 20 million travelers to which it can sell tours and activities. Musement has over 35,000 experiences in 1,100 destinations, mostly in Europe. Given TUI's large market share of the Cabo Verde tourism market, Musement could become important for marketing Cabo Verde experiences in the future.

4.5.4 Listing Policies of OTAs

The OTAs have commission rates of between 20% and 40%. Suppliers are required to meet local regulations. Some OTAs require them to provide proof of public liability insurance. Annex 2 has more details on the OTAs and their listing policies.

4.6 Profile of the Traveler

Several market segments of travelers have the most potential for local experiences:

- **Adventure travelers –** This is a large and growing market segment. "Being Local" is one of the top 10 adventure travel trends. Most adventure travelers now place higher importance on culture and cultural understanding than on risk as they did in the past. Today's adventure travelers want to be in a natural environment, to learn and to have meaningful experiences.[47]
- **Millennials –** This group, born between the early 1980s and early 2000s, values experiences more than things. They look for authenticity and cultural experiences when they travel. Phocuswright's *2018 U.S. Consumer Travel Report* found the overall demand for activities is greatest among millennials compared to other age groups. They are seeking once in a lifetime experiences. They want ecological experiences, especially ones that benefit local ecological projects, and they want local experiences. They look

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[45] Expedia Sold More Than $500 Million in Tours and Activities in 2017. Apr 27, 2018. https://skift.com/2018/04/27/expedia-sold-more-than-500-million-in-tours-and-activities-in-2017/

[46] 1) TUI Group buys Musement. Skift. Sep 14, 2018. https://skift.com/2018/09/14/tui-group-buys-musement-as-tours-and-activities-sector-stays-hot-for-deals/. 2) TUI buys Musement to bolster destination experiences. Sep 17, 2018. Phocuswire. https://www.phocuswire.com/TUI-buys-Musement-to-bolster-destination-experiences

[47] North American Adventure Travelers. Adventure Travel Trade Association, East Carolina University, and Outside magazine. 2017.

for adventure. History and culture walking tours are popular.[48] Millennials already use the online marketplaces to book travel.[49]

- **Baby boomers** Born between the mid 1940s and mid 1960s, this group is increasingly interested in local experiences. In its 2018 annual travel survey, the AARP (the American Association of Retired Persons), which has over 38 million members 50+ years old, found that 49% of baby boomers like "touring with a local" compared to 40% in 2017.[50] A 2019 survey of European and U.S. travelers by Arival found that older travelers (55+ years) are more interested in local experiences than younger ones.[51]

Although the above segments have the highest potential, market research shows that almost all travelers now participate tours or activities while on a trip. A survey of 4,000 French, German, U.K. and U.S. travelers conducted by Arival in 2018 found that nearly all (97-98%) of leisure travelers in these markets booked a tour, attended an event, visited an attraction or did an activity on a trip within the past year. [52] Over 70% of French, German and U.K. travelers included an outdoor adventure or recreational activity on their trip, and most included multiple activities and tours. On average, travelers from all three countries took three activities and one tour per trip.[53] Among leisure travelers, the survey found even higher multiple experience rates. These travelers participated in an average of seven tours or activities per trip.[54]

The Arival survey also found that among German, French, U.K. and U.S. travelers four of the top seven activities are ticketed attractions: historic, cultural site (about 52-62% participation, depending on country); natural attraction (about 45-55% participation); museum or zoo (about 45-55% participation), and; amusement park (about 32-45% participation). Other popular activities are sightseeing tours, performing arts, wellness, sporting activities, outdoor excursions, culinary, and pro-sporting events. [55]

Phocuswright's *2018 U.S. Consumer Travel Report* has more information on the most popular tours and activities for U.S. travelers. In that year, the vast majority (80%) of them participated in a tour, activity, event or ticketed attraction on their last leisure trip. Day tours and sightseeing were the most popular. About 30% of all travelers visited a museum, cultural attraction or participated in an outdoor activity.[56]

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[48] Travel Trends 2019. Trekksoft. 2019.

[49] 1) Facts and Stats. World Youth Student and Educational Travel Confederation (WYSETC). No date. https://www.wysetc.org/about-us/facts-and-stats/. 2) Why Millennials Are The Most Important Consumer Generation For The Travel Industry. Forbes. Nov 8, 2017.

[50] Gelfeld, Vicki. AARP Travel Research: 2018 Travel Trends. Washington, DC: AARP Research, November 2017.

[51] Tours, Activities and Attractions: Travel's Next Big Thing (and the Opportunity for Decision Makers). Arival. March 19, 2019.

[52] Arival's State of In-Destination Activity Travelers. August 2018.

[53] Tour and Activity Booking in Europe. Arival. February, 2019.

[54] Arival's State of In-Destination Activity Travelers. August 2018.

[55] Arival's State of In-Destination Activity Travelers. August 2018.

[56] Travel Trends 2019. Trekksoft. 2019.

Research conducted in 2019 by the tours and activities search engine TourScanner, based on its one million website users and 10,000 bookings of short duration activities (daily or 2- to 3-day tours), shows several interesting results:[57]

- The majority (40%) looking for activities online are aged between 25 to 34 years and about one-fifth were between 35 and 44 years.
- Females (61%) were more interested in tours and activities.
- The average value of a booking was US$157.
- 50% of bookings were made less than eight days before the tour or activity.
- 50% of mobile transactions were made between the day of the activity and two days prior to it.

4.7 Local Experiences and Online Marketplaces: Opportunities and Challenges

The online marketplaces are providing developing destinations like Cabo Verde with new opportunities to develop and market local experiences, but these opportunities come with challenges. This section summarizes the main opportunities and challenges identified from the research and consultations conducted for this study.

4.7.1 Opportunities for Developing Destinations

- **Experience-focused tourism creates business and job opportunities for community members in a range of areas.** In Canada, which has an experience-focussed development strategy for indigenous tourism, the number of indigenous tourism businesses grew to 1,878 in 2017 from 1,579 in 2015, an increase of 19% in two years.[58] There has also been strong growth in Indigenous tourism sector employment, which is now outpacing overall growth in employment in Canada (+17.3% vs +5.1%). There were 41,153 total jobs in the indigenous tourism sector in 2017, compared to 33,112 jobs in 2015, an increase of almost 25%.[59]
- **Local experiences and the online marketplace lower the barriers to enter the tourism value chain.** Some types of local experiences can be developed with little or no tourism training, infrastructure or other costs. For example, entrepreneurs or MSEs can offer local experiences such as cultural walks or jogs through neighborhoods, sharing of a meal and culture at a local restaurant, going to a local sporting event, or giving lessons in how to play a unique local musical instrument. Once developed, the experiences can be sold on the online marketplaces, which allow experience suppliers to self-load products, create their own tour descriptions, add images and manage availability and bookings. The marketplaces allow experience suppliers to reach millions of customers on the Internet and sell their experiences without the cost and difficulty of setting up a website with an e-commerce function. It makes it much easier for entrepreneurs and MSEs to enter the tourism value chain and earn an income. For example, the average earnings for someone in South Africa who hosts Airbnb Experiences six times per month

[57] TourScanner Annual Report 2019. Tour Scanner. April 2019. https://tourscanner.co/tourscanner_report_2019.pdf?x87060

[58] Indigenous Tourism is Growing Quickly in Canada. Conference Board of Canada and Indigenous Tourism Association of Canada. Nov 2018.

[59] Indigenous Tourism Sector in Canada Exceeding All Growth Targets. Indigenous Tourism Association of Canada. Feb 20, 2019.

are US$14,000 annually. Those who host 12 times per month earn an average of US$18,000 annually.[60]

- **Marketing experiences helps to diversify and differentiate destinations.** As is discussed further in the case study in Section 4.1, in recent years Bermuda has focussed on developing 'home-grown experiences' and digital marketing in partnership with strong online brands such as AirbnbExperiences, TripAdvisorExperiences (Viator) and Expedia. This strategy helped to reposition Bermuda's destination brand and turn its stagnant tourism industry around in a few short years.
- **Online marketplaces provide vital intelligence about visitors.** One of the benefits Bermuda has gained from its strategy of partnering with online marketplaces is the ability to collect visitor data and use it to understand what travelers are searching for when they do research tours and activities online and what types of tours and activities they are buying. This information is very useful for destination managers. It supports national strategic planning and product development and marketing by experience suppliers.
- **Key markets segments bring better socio-economic impacts.** The research shows that the market segments that have the most interest in local experiences bring better than average benefits to the places they visit. A USAID research study comparing mass tourism with community-based adventure tourism in Jordan found that four adventure travelers generate the same revenue that is generated by nine overnight packaged tourists and by about 100 cruise visitor arrivals. Additionally, about 65% of the revenue generated by adventure travelers remains in the local economy, contributing to more local entrepreneurship and a higher job creation rate compared to mass tourism.[61] Millennials, another key market for local experiences, often take much longer trips than most other tourists and spend up to two thirds more on average.[62]
- **Enables market access for rural and indigenous communities**. Local experiences typically involve deeper and more meaningful encounters with communities, which means travelers go beyond visiting the usual touristic sites. Travelers will go to hard to reach places because it contributes to authenticity and the chance to have close interactions with community members. The online marketplaces make it easier for travelers to find experiences taking place in rural and indigenous communities. The USAID-LENS (Local Enterprise Support) project in Jordan found that rural entrepreneurs and businesses who received assistance to develop local experiences and market them on AirbnbExperiences were able to access new markets and increase their incomes.[63]
- **Local experiences promote opportunities for women, youth and seniors.** Some research suggests that most suppliers of both P2P accommodation and local experiences that market their tourism products on online platforms are female.

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[60] South Africa Economic Impact Study. Airbnb. August 2018.

[61] Strengthening Tourism Competitiveness in the OECS countries: Market Analysis (OECS Competitiveness Project (P152117)). M. Nikolova, E. Fernandes, & R. Shahidsaless. 2015.

[62] Facts and Stats. World Youth Student and Educational Travel Confederation (WYSETC). No date. https://www.wysetc.org/about-us/facts-and-stats.

[63] How the new "Local Experiences" platform on Airbnb benefits local communities in Jordan. USAID Jordan Local Enterprise Support Project. Nov 20, 2017.

AirbnbExperiences says that women make up more than 65% of accommodation hosts in South Africa.[64] In the Philippines, they have nearly 60% of accommodation listings. On the Experiences side, almost 60% of hosts in Bangkok and Milan are women. The number of female hosts is rising over time.[65] While there is no research about hosting of local experiences by youth or seniors, the data from the P2P accommodation sector suggests both of these groups are benefitting from the growth of P2P tourism generally. In May 2018, Airbnb said that, globally, 58% of accommodation hosts are millennials and that 400,000 hosts are seniors.[66]

- **Preservation of culture.** The USAID-LENS project found that once they understand that tourists are willing to pay to learn about them and their everyday life, community members become prouder of their unique culture, knowledge and skills and want to preserve them.[67]

4.7.2 Challenges for Developing Destinations

- **Registration and licensing of non-traditional experience suppliers.** As noted in Section 3.4.3, AirbnbExperiences requires that experience hosts self-attest that their experiences meet local tourism rules and regulations, but there is no licensing requirement. Controversy and backlash have arisen against AirbnbExperiences in places such as Hong Kong because many hosts who operate experiences are unlicensed and unregulated, which raises issues of risks to visitor safety, unfair competition for licensed tourism suppliers, and deterioration of destination reputation due to inferior experience quality. Additionally, hosts might be putting themselves at risk because they are not licensed.[68] Modernization of licensing and regulation local experiences is needed to accommodate the new class of non-professional tourism experience suppliers.[69]
- **Entrepreneurs, MSEs and communities may not have the capacity to develop local experiences.** Although local experiences like cultural walks, shared meals or music lessons are relatively easy to develop, it is still challenging for local persons to develop and market these tourism products. Local persons need capacity building in areas like product development, marketing, entrepreneurship, financial management and communications. They may need grants or other financial assistance to support product and business development. To overcome such constraints, it is often necessary for destinations to establish support programs.

[64] Airbnb in South Africa: The Positive Impact of Healthy Tourism. Airbnb. 2018.

[65] Women Hosts are Leading the Way. Airbnb Newroom. March 5, 2019.

[66] New Data: The Airbnb Advantage. Airbnb Newroom. May 8, 2019.

[67] How the new “Local Experiences” platform on Airbnb benefits local communities in Jordan. USAID Jordan Local Enterprise Support Project. Nov 20, 2017.

[68] Unlicensed tours of Hong Kong neighbourhoods are booming on platforms like Airbnb but operators are wary of the legal risks they run. South China Morning Post. Jul 7, 2019. https://www.scmp.com/news/hong-kong/society/article/3017533/unlicensed-tours-hong-kong-neighbourhoods-are-booming

[69] According to Airbnb's Head of Experiences Policy, licensing rules and regulations are one of the most significant barriers to entry for local entrepreneurs. The challenges include the financial costs and long duration of training programs, especially for tour guides. To support the development of local experiences, destinations should modernize their licensing processes. Airbnb suggests a graduated licensing system, allowing entrepreneurs to get qualified and compliant ‘on the job’ so they can earn an income while training and capacity building.

- **Online Marketing Requires ICT (Information and Communications Technology) Access and Skills.** The International Telecommunications Union's (ITU) research shows an upward trend in access to the Internet in developing countries. However, it also points to a lack of ICT skills which prevent people in these countries from undertaking more complex activities online, which is a serious impediment for developing countries.[70]
- **Financial services constraints can prevent local people from selling through online channels.** In many developing and emerging markets, it is difficult for local people to obtain financial services like bank accounts and loans. Financial regulation, bureaucratic and infrastructure limitations can make it difficult or impossible for many people to sell tourism products and services through online channels. In response to the barriers, online marketplaces are offering more options for hosts to receive their payments from customers.[71] For example, the payment options offered by AirbnbExperiences are direct deposit, international bank wire, Western Union wire transfer, PayPal, and Payoneer Prepaid Debit MasterCard,[72] which can be used to transfer funds into a bank account or as a credit card for making purchases. The options available differ depending on the host's country.
- **The online marketplaces are competitive for tour and activity suppliers.** The online marketplaces have hundreds of thousands of tour and activity listings and millions of users. Hosts of local experiences compete with thousands of other local hosts as well as professional tour and activity suppliers. The research indicates there are at least 125,000 tour and activity suppliers.[73] The online marketplace is also crowded. In addition to the large well-known marketplaces reviewed in this study, some estimates put the number of other online marketplaces at over 70.[74] In this highly competitive environment, hosts of local experiences might only receive infrequent or few bookings and earn relatively little income.

5 Case Studies

This section presents case studies of how local experiences are developed and marketed in two destinations, Bermuda and South Africa. The objective is to identify lessons useful for Cabo Verde.

5.1 Bermuda

Bermuda's approach to developing and marketing 'home-grown experiences' is informative for Cabo Verde. Before 2012, Bermuda's tourism sector focussed on sun, sand and sea tourism. A lack of visitor interest and investor confidence was eroding the sector due to a combination of increased competition from other destinations, a difficult investment climate and a lack of effort by the government to develop and promote tourism. Recognizing the need to reinvigorate the sector, Bermuda prepared a new national tourism plan in 2012. A central

70 Measuring the Information Society Report 2018: Executive Summary. International Telecommunications Union. 2018.
71 Tourism and the Sharing Economy: Policy & Potential of Sustainable Peer-to-Peer Accommodation. World Bank Group. 2018.
72 A Guide To Airbnb Host Payments Methods. Guesty. Aug 31, 2018. https://www.guesty.com/blog/guide-to-airbnb-host-payments/
73 Tours & Activities Come of Age: The Global Travel Activities Marketplace 2014-2020. Phocuswright. 2017.
74 Threatless: Why the OTA-tech alignments in activities aren't a big deal. Phocuswire. Aug 5, 2019.

strategy of the plan was to differentiate Bermuda from competitive Caribbean destinations by marketing it as an Atlantic island and promoting its mixed British, Caribbean and African roots.[75]

In 2014, the Bermuda Tourist Authority, the autonomous body formed to handle tourism development and marketing for the government, started to help local people to develop home-grown experiences for visitors. Ever since then Bermuda has made strong efforts to develop memorable home-grown experiences and to drive demand for the experiences using analytics, digital marketing, partnerships with airlines and partnerships with online travel companies including Google, TripAdvisor, AirbnbExperiences, Facebook and Expedia.[76]

The BTA has a Product & Experiences division, which is responsible for the development of home-grown experiences. Between 2014 and 2019, BTA invested US$4.1 million in the development or enhancement of 177 experiences.[77] The P&E division holds many workshops to bring entrepreneurs and tourism businesses into offering local experiences. It provides them with information on visitor markets, creating and marketing experiences, and specific market segments topics such as sports and cultural tourism. It uses social media pages and newsletters to keep suppliers informed about trends, provide information and conduct education and training. There is an Assistant Experience Manager who provides technical assistance to suppliers of experiences. There also are programs to support new business start-ups.[78]

BTA is packaging experiences that generate revenues for local suppliers of experiences in new ways. For example, it developed a behind-the-scenes experience where guests can ride a parade float and a VIP experience round Bermuda Day, a popular annual parade and cultural event.[79] BTA also works with international cruise companies and tour operators to create new home-grown experiences.

In October 2018, Bermuda and Airbnb signed tax and marketing agreements. Airbnb agreed to collect 4.5% vacation tax direct from guests when they book a Bermuda home. Bermuda agreed to use the funds to help promote Bermuda's tourism industry, including the launch of AirbnbExperiences on the island and collaborative destination marketing.[80] In March 2019, Bermuda launched on AirbnbExperiences with 17 tours and experiences organized by local entrepreneurs and experts.[81]

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[75] 2013 Bermuda National Tourism Master Plan. Townhall Presentation. June 11, 2012.

[76] Communication with Glenn Jones, Chief Experience Development Officer, Bermuda Tourist Authority. June 2019.

[77] Product and Experience Investment Workshop – Round 2 January to June 2020. Bermuda Tourist Authority. 2019. https://www.gotobermuda.com/sites/default/files/2019_workshop_presentation_round_2.pdf

[78] Communication with Glenn Jones, Chief Experience Development Officer, Bermuda Tourist Authority. June 2019.

[79] Bermuda Day VIP Access for Visitors, Beyond the Front Row. Press Release. Bermuda Tourist Authority. May 1528 , 2019. https://www.gotobermuda.com/bta/press-release/bermuda-day-vip-access-visitors-beyond-the-front-row

[80] Airbnb Signs Tax and Marketing Agreements with Bermuda. Airbnb Newsroom. Oct 17, 2018. https://press.airbnb.com/airbnb-signs-tax-and-marketing-agreements-with-bermuda/

[81] Airbnb and Bermuda Tourism Authority launch Experiences in Bermuda. Press Release. Bermuda Tourist Authority. Mar 28 , 2019. https://www.gotobermuda.com/bta/press-release/airbnb-and-bermuda-tourism-authority-launch-experiences-bermuda

BTA uses online search and social media strategies to improve the online visibility of local businesses and home-grown experiences. For example:

- BTA's Product & Experience division ensures that all local tourism businesses have setup their GoogleMyBusiness and TripAdvisor business listings and are in trained in how to use these listings to market their experiences.[82]
- Since late May 2018, BTA has uploaded 360-degree videos of the entire island to Google and has taught more than 100 local business owners how to add video to their listings. As of September 2019, Bermuda had more than 23 million views of its images and Street View contributions on Google.[83]
- The BTA manages destination pages on TripAdvisor. It is one of the first countries to use the destination-focused travel feed, a new social media-style feature introduced by Google in 2019. The feed has photo albums and curated content in different themes like adventure, romance, family, water-based, nature and romance. The content includes trips, articles, photos and videos.
- Social media initiatives include a two-week long joint Bermuda-Airbnb social campaign conducted in December 2019, which generated five million impressions among Facebook, Twitter and Instagram users.[84]
- BTA partners with the large online travel companies including Airbnb, Expedia, Trip Advisor and Google to provide training sessions about using the online platforms for selling experiences. The training takes place at BTA's annual supplier training summit every October and throughout the year, often by webinar. Beginner, intermediate and advanced levels of training are provided. [85]
- BTA uses the "Tourism Sentiment Index", which collects data from over peer-to-peer review sources and measures consumers' awareness of and attitudes toward a destination's tourism offerings. The index measures a destination's performance and compares it to competitive destinations by scanning online reviews about the destination plus analyzing 50 different experiences and services in the destination.[86] BTA shares the results with local experience suppliers.

Bermuda's strategy of using experiences, digital marketing and partnerships has paid off. Leisure arrivals have increased, leisure visitor spending has grown, and cruise visitor arrivals have improved since 2014. Key results in 2018 were:[87]

- Growth in visitor arrivals of 11% over the previous year.
- Record-breaking number of total arrivals, totaling 771,000.
- Leisure air visitor spending was up 67% compared to 2015.
- The highest number of leisure air arrivals were received since 2002.

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[82] Communication with Glenn Jones, Chief Experience Development Officer, Bermuda Tourist Authority. June 2019.

[83] Destination marketing, part 2: Opportunities in search and social. Phocuswire. Sep 16, 2019.

[84] Marketing Partnership with Airbnb Nets Big Audience on Social Media. Bermuda Tourist Authority. Press Release. https://www.gotobermuda.com/bta/press-release/marketing-partnership-airbnb-nets-big-audience-on-social-media

[85] Communication with Glenn Jones, Chief Experience Development Officer, Bermuda Tourist Authority. June 2019.

[86] See https://destinationthink.com/about-tsi/.

[87] Third Straight Year of Growth for Bermuda’s Tourism Industry. Press Release. Bermuda Tourist Authority. Feb 6, 2019. https://www.gotobermuda.com/bta/press-release/third-straight-year-growth-bermudas-tourism-industry

- Cruise passenger arrivals jumped 34% during non-summer months.

Annex 3 provides more information on the Bermuda case study.

5.2 Airbnb Africa Academy[88]

This second case study is instructive because it shows how Airbnb Experiences is supporting non-professional entrepreneurs to develop and market local experiences in South Africa.

In October 2017, Airbnb made a US$1 million commitment to support community-based tourism in Africa between 2018 and 2020. Supported by the World Bank, the program focusses on three main areas: promoting sustainable and inclusive tourism through technology; empowering townships through hosting, and; supporting locals and non-profits through Airbnb travel.[89]

Airbnb Africa Academy (AAA) launched in 2018. It is a business training and incubator program that supports the third area named above. It has a dual approach: 1) Developing training and curriculum materials suitable for South African local entrepreneurs and community groups, and; 2) Capacity building with partner organizations in communities that can train and support the local entrepreneurs and community groups using the Airbnb platform. Airbnb has piloted the Africa Academy program in eight townships in South Africa.[90]

The training and curriculum materials teach new entrepreneurs how to create local experiences and promote them on the AirbnbExperiences platform:[91]

- Communities for the program are selected on the basis of: high tourism potential (existing visitors; anchor attraction or reason to visit); relatively safe and welcoming to tourists; cell phone reception or signal for data, and; has/is in close proximity to consistent bookings from Airbnb's accommodations platform.
- Participants selected from the communities receive three (3) days of training in how to use the Airbnb P2P platform and three (3) months of online and in-person support (tools and resources). They join a "community hub" for entrepreneurship and tourism.
- To help ensure success, skilled partner organizations (called AAA partners) located in host communities receive training to support the new local hosts.

The program assists new entrepreneurs to establish a small business. As stated earlier in this study, the average earnings for someone in South Africa who hosts Airbnb Experiences six times per month are US$14,000 annually. Those who host 12 times per month average US$18,000.[92]

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88 South Africa Economic Impact Study. Airbnb. August 2018.

89 Airbnb commits $1 million to boost community-led tourism projects in Africa. Airbnb Newsroom. Oct 17, 2017. https://press.airbnb.com/airbnb-commits-1m-to-community-led-tourism-projects-africa/

90 Airbnb Africa Academy: Empowering emerging African entrepreneurs. Airbnb. No date. https://www.airbnbcitizen.com/airbnb-africa-academy

91 Airbnb Africa Academy: Empowering emerging African entrepreneurs. Airbnb. Info deck. 2019. (Powerpoint presentation sourced from Airbnb.)

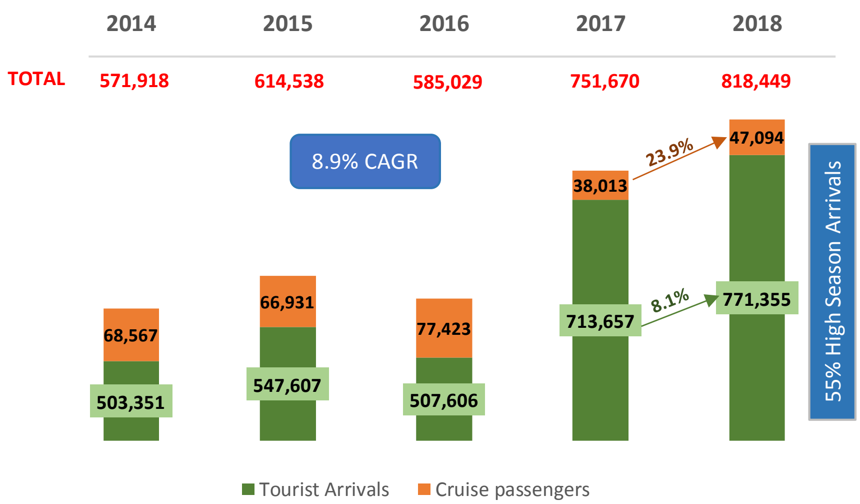
92 South Africa Economic Impact Study. Airbnb. August 2018.

6 Cabo Verde Tourism Demand

6.1 Inbound Visitors[93]

In 2018, Cabo Verde received 818,449 total inbound visitors, of which 94.2% were tourist arrivals, and 5.8% were cruise passengers. High season arrivals represented 55.6% of the total. Tourist arrivals increased by 8.1% and cruise arrivals increased by 23.9% compared to 2017. Since 2014, the compound annual growth rate (CAGR) for inbound visitor arrivals is 8.9%.

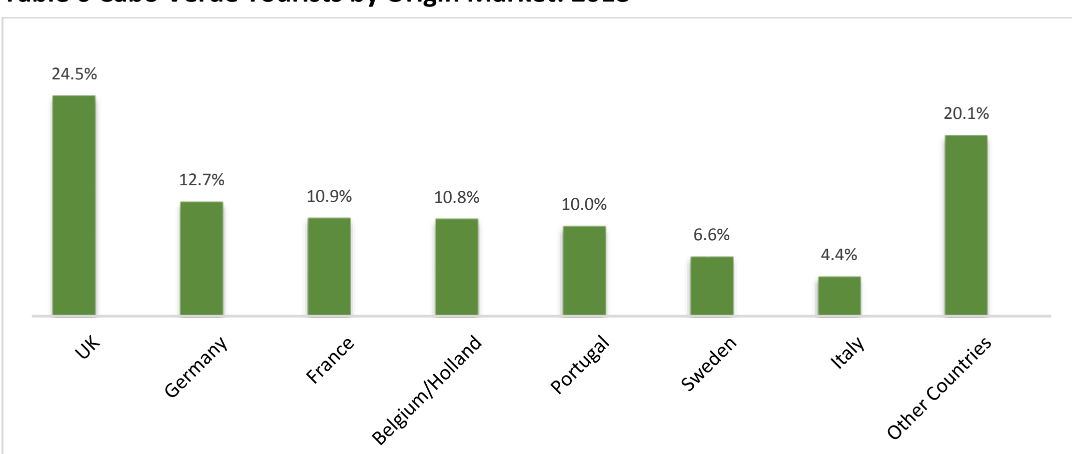
Table 5 Cabo Verde Inbound Visitors: 2014-2018



Sources: 2018 Inquiry of Tourist Expenditure and Satisfaction (IGST). INE. 2019. Consolidated Statistics, December 2018. ENAPOR. 2018.

As shown in Table 6, EU countries are the main origin markets, comprising 64.2% of visitors to Cabo Verde in 2018. In that year, the U.K. was the primary market, with 24.5% of arrivals, followed by Germany (12.7%), France (10.9%), the Netherlands and Belgium (10.8% combined) and Portugal (10%).

Table 6 Cabo Verde Tourists by Origin Market: 2018



Source: Inquiry of Tourist Expenditure and Satisfaction. INE. 2018.

[93] Annex 2 contains more cruise tourism information.

6.2 Projected Tourism Growth

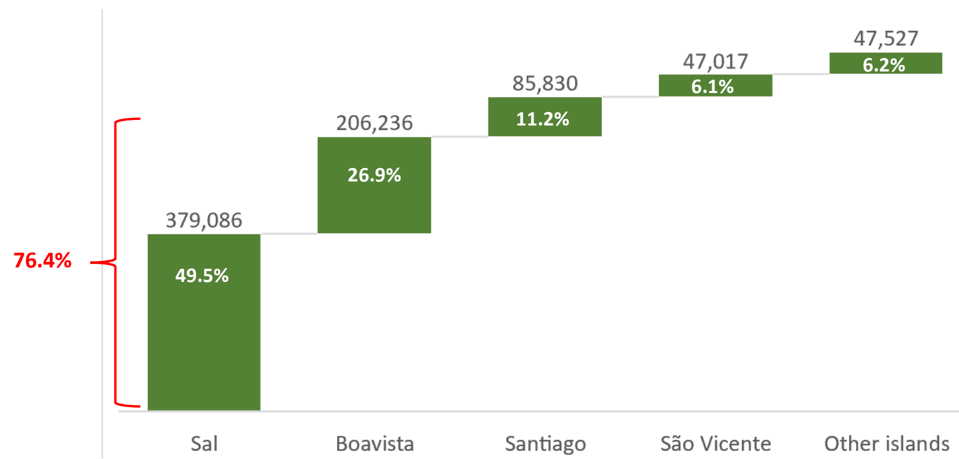
The government of Cabo Verde's Strategic Plan for Sustainable Tourism Development for 2018-2030 projects four growth scenarios. They range from a Very Optimistic one with an annual average growth annual rate of 15% to a Pessimistic one with a growth rate of 5%.[94]

The World Bank Group forecasts a lower tourism growth rate because most of Cabo Verde's visitors are from Europe, where growth of real GDP is expected to slow in the coming years due to the Brexit situation and trade conflicts and other tensions between the US, EU, Russia and China. As a result, WBG predicts that Cabo Verde's annual growth rate will be 3.6% between 2019 and 2030.[95] However, there is a good chance that even the lower projected tourism growth level will not be attained. The financial collapse of Thomas Cook in September 2019[96], one of the tour operators that brings the majority of tourist visitors to Cabo Verde, could harm growth.

6.3 Tourist Arrivals and Hotel Nights[97]

Table 7 shows that in 2018 Sal Island received 379,086 tourist arrivals (49.5%) followed by Boa Vista with 206,236 arrivals (26.9%), Santiago with 85,830 arrivals (11.2%) and São Vicente with 47,017 arrivals (6.1%).

Table 7 Cabo Verde Tourist Arrivals by Island: 2018



Source: Tourism Statistics: Guests Movement 2018. INE. 2018

Meantime, Table 8 shows that Sal had 54.8% of hotel room nights (over 2.5 million nights), followed by Boa Vista at 36% (almost 1.66 million nights). Together, Sal and Boa Vista captured over three-quarters of all arrivals to Cabo Verde and almost 90% of hotel room nights, because

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[94] Strategic Plan for Sustainable Tourism Development for 2018-2030 (Tourism GoPeds). Official Bulletin. Government of Cabo Verde. Wednesday, January 9, 2019 I Series Number 2.

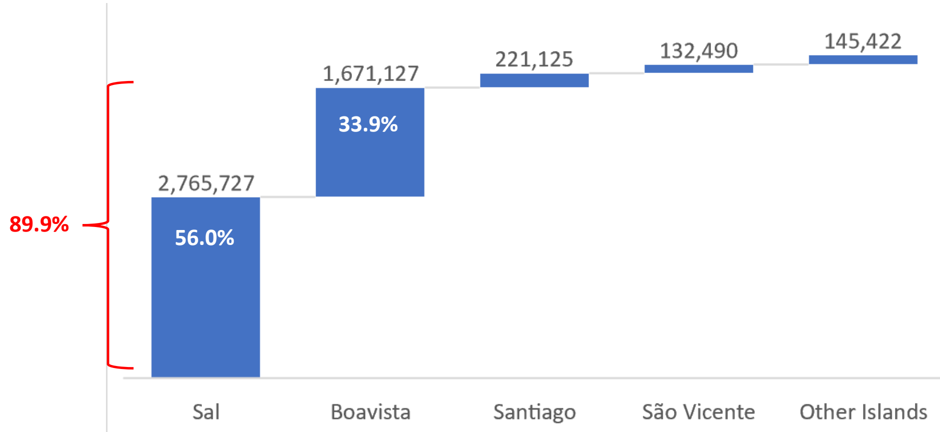
[95] Diversifying Tourism and Strengthening Linkages through Digital Technologies ASA (P169076): Strengthening Linkages with the Tourism Supply Chain in Cabo Verde. World Bank Group. July 2019.

[96] Thomas Cook collapses as last-ditch rescue talks fail. BBC News. Sep 23, 2019. https://www.bbc.com/news/business-49791249

[97] Annex 4 has historical data on tourist arrivals and bed nights by island.

the all-inclusive resorts, the main draw for the sun and beach holiday segment, dominate these two islands.[98]

Table 8 Cabo Verde Hotel Nights by Island: 2017



Source: Tourism Statistics: Tourism Tables 2018. INE. 2018

6.4 Tourist Characteristics

Table 9 has information on tourist characteristics from INE's *Inquiry of Tourist Expenditure and Satisfaction (IGST)* publications for 2017 and 2018, which report on visitor intercept surveys conducted at international airports. Among the key points are that most visitors come on packages and that third parties (tour operators or travel agents) are used to organize most of the trips. The majority of visitor spending (83.3%) takes place outside the country and the average per day spending of visitors while in the country is only US$46. These findings underscore the dominance of the all-inclusive resort model of tourism segment, which does not benefit most Cape Verdeans.

Table 9 Cabo Verde Tourist Characteristics: 2018

Characteristic	Details	
Packaged Tours	Packaged tour visitors: 624,798 (81%) All-inclusive package visitors: 75.8% of all packaged visitors (584,687 visitors)	
Booking of Trip	81% of trips were organized by third parties 41.2% by tour operators and 40.8% by travel agencies.	
Purpose of Trip	Vacation: 92% Professional Purposes: 2.7% Trade fair or Conference: 1% Family Purposes: 1%	
Spending	Total: US$340,000 (33.3 million CVE) Prepayments:* $US283,220 (83.3%) Avg per tourist per day: US$46 Avg per day- Unpackaged tourist: US$138 Avg per day- Packaged tourist: US$25	Spending per day by origin market: US: US$146 Brazil: US$114 Switzerland: US$77 Portugal: US$72 France: US$67

[98] Arrivals and hotel nights data for 2018 are not available for Santo Antão. According to INE's *Tourism Statistics Guests Movement 2017,* in 2017 Santo Antão received 163,061 tourist arrivals (3.64% of total 2017 arrivals) and had 26,080 hotel nights (1.56% of total 2017 hotel nights).

Characteristic	Details	
Gender and Age	Gender: 53.5% Women Avg age: 45 years	< 25 years: 7.9% 25 to 34 years: 22.3% 35 to 44 years: 17.3% 45 to 54 years: 22.7% 55+ years: 25.8%
Number of Days	Cabo Verde: Avg per tourist: 8.6 (vs 10.2 in 2017) Avg per unpackaged tourist: 10 (vs 16.2 in 2017) Avg per packaged tourist: 8.5 (vs 8.6 in 2017)	Boa Vista: 8.7 days (vs 8.9 in 2017) Sal: 8.1 days (vs 8.3 in 2017) Santiago: 6.7 days (vs 8.0 in 2017) São Vicente: 5.4 days (vs 10.3 in 2017) Santo Antão: 5 days (vs 12.3 in 2017)
Employment & Income	Occupation: Employed: 83.7% Retired: 12.2% Student: 2.1%	Annual Household Income: >€60,000 (US$67,000): 24.7% €48,001 to €60,000: 19.4% €36,001 and €48,000: 18.3%
Visitor Satisfaction	Overall: 94.2% Accommodation: 91.2% Excursions: 86.6%	Would recommend CV: 97.8% Intend to return: 95%

* Prepayments made in origin countries

6.5 Main Tourist Segments

The main tourist segments for Cabo Verde are all-inclusive package tourists, adventure travelers, who come on packaged tours or as FITs (Free Independent Travelers), and cruise visitors. The map in Table 10 shows the main islands that each of these segments visits.

Table 10 Islands Visited by Visitor Segment

Source: Created by Helena Moscoso and Judy Karwacki, World Bank Consultants

The map shows that all-inclusive visitors visit Sal and Boa Vista and take day trips to Santiago. Adventure travelers mostly visit São Vicente, Santo Antão and Santiago. They may also visit Brava, Fogo and São Nichalau. Cruise visitors mostly visit São Vicente, Santo Antão and Santiago.

6.5.1 All-Inclusive Tourists

The all-inclusive tourist segment is concentrated in Sal and Boa Vista, where the large, mostly foreign-owned, hotels are located. These islands are relatively flat and lack interest from a natural and cultural heritage point of view. The main draws for visitors are the ocean, sandy beaches and sunshine. Analysis by the World Bank Group shows the hotels on these islands are highly dependent on the international tourism operators (TUI Group, Thomas Cook and Soltrópico). Affiliated hotels depend on these tour operators for 98% of their business, while independent hotels generate 80% or more of their business from these channels.[99]

Representatives of the tour operators and hotels in Cabo Verde provided information on the characteristics of all-inclusive tourist segments. Annex 5 has more details. The key points are:

- The U.K. is the primary origin market, followed by German-speaking countries and other countries in Continental Europe. Many Scandinavians come in winter months.
- Most tourists are 40 years and older.
- U.K. tourists are more interested in partying than visitors from other markets.
- People from Continental Europe markets are well-traveled and active persons looking for something unique. They spend more and take more excursions than U.K. visitors.
- Scandinavian visitors differ from other Continental Europe markets in that they are younger and mainly seek adventure activities.
- The all-inclusive tour operators have huge marketing budgets and use all forms of marketing. The travel trade is the most important distribution channel.

Information collected from the dominant tour operators -- TUI and (the now-defunct) Thomas Cook -- on preferred excursions of the all-inclusive tourists shows that about one-half (50%) of all-inclusive tourists purchase tours and activities while in Cabo Verde. Of those tourists:[100]

- 55% of Sal tourists and 65% of Boa Vista tourists take Island Tours.
- Other popular activities purchased by tourists are Boat Tours (Boa Vista 20% and Sal 10%), Romantic or BBQ beach nights (Boa Vista 14% and Sal 5%), Cabo Verdean Theme Nights, and Off-Road quads, buggies (Boa Vista 13% and Sal 5%).
- Other activities that are popular but that have comparatively low participation rates (1 to 2%) are Diving & Water-based Activities, Biking, Spa & Wellness, and Walking.

A cautionary note from the TUI and Thomas Cook representatives is that some good local experiences have not been able to meet their the health and safety requirements of their

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[99] Diversifying Tourism and Strengthening Linkages through Digital Technologies ASA (P169076): Strengthening Linkages with the Tourism Supply Chain in Cabo Verde. World Bank Group. July 2019.

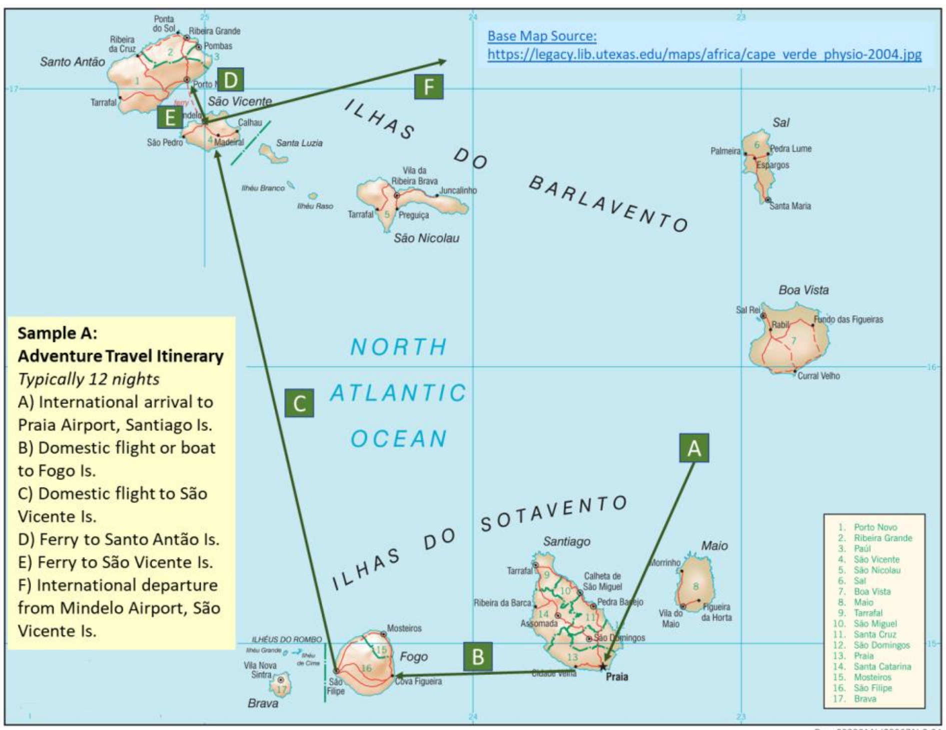
[100] These participation rates apply only to tours and activities purchased from TUI or Thomas Cook, not those purchased directly from local suppliers by all-inclusive visitors.

companies for suppliers. TUI stopped selling a popular "Fish Like a Cabo Verdean" experience because the operator was unable to meet new safety standards implemented by TUI. Another experience, cooking at a local home, could not meet TUI's fire safety and food handling standards. Also, the large international tour operators require suppliers to have public liability insurance, which is costly and difficult to obtain in Cabo Verde.[101]

6.5.2 Adventure Travel Visitors

Adventure travelers visit Cabo Verde for hiking and nature and culture tours. As previously noted, they mostly visit São Vicente, Santo Antão and Santiago. Some of the adventure tourists visit Fogo, Brava and São Nichalau. These islands are much more culturally and naturally diverse than Sal or Boa Vista. Adventure tourists may visit Sal or Boa Vista to spend a few days relaxing at the beach at the end of their adventure trip. Tables 11 and 12 have outlines of two popular adventure travel itineraries, which average 12 nights in duration.

Table 11 Sample A: Multi-Island Adventure Travel Itinerary



Source: Created by Helena Moscoso and Judy Karwacki, World Bank Consultants

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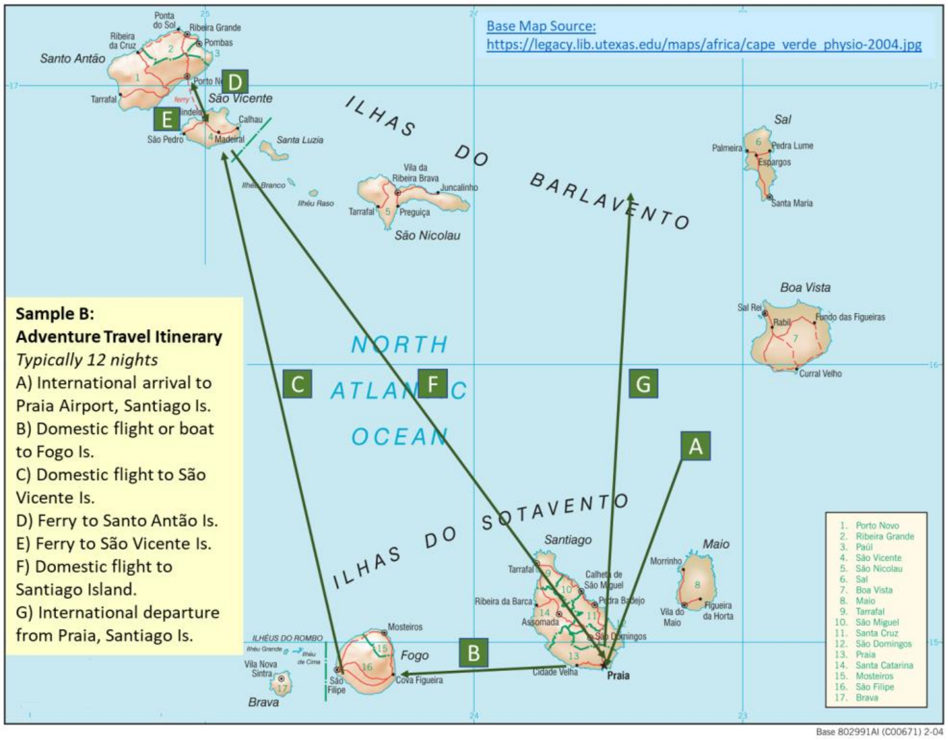
101 As noted in Diversifying Tourism and Strengthening Linkages through Digital Technologies ASA (P169076): Strengthening Linkages with the Tourism Supply Chain in Cabo Verde by the World Bank Group, large international companies tend to transfer any potential liabilities to their suppliers as part of their risk management policies. They have high standards and generally work only with accredited suppliers.

Table 12 Sample B: Multi-Island Adventure Travel Itinerary



Source: Created by Helena Moscoso and Judy Karwacki, World Bank Consultants

The consultations with tour operator and hotel stakeholders provide information about the characteristics of the adventure travel segment. Annex 5 has more details.

- The main visitor origin markets are German-speaking countries and other EU countries, especially the Netherlands and France.
- Most adventure travelers are between 30 and 70 years old, active and well-traveled.
- Virtually all of these travelers are highly interested in the local culture, and their trips usually include local-themed tours and activities - such as fruit picking, making cachupa or visiting a grouge factory.
- The most common forms of marketing used by tour operators to market to adventure travelers are working with travel trade partners, word of mouth, and digital marketing like websites and Facebook.

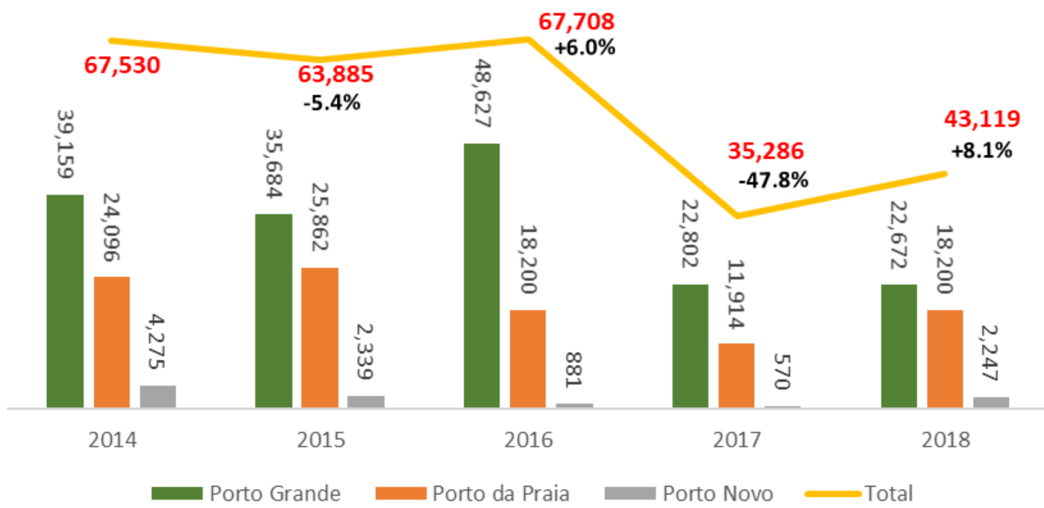
6.5.3 Cruise Visitors[102]

The three main cruise ports in Cabo Verde are Porto Grande on São Vicente, Praia Port on Santiago and Porto Novo on Santo Antão. As shown in Table 13, the three ports received 43,119 passengers in 2018, an increase of 8.1% over the previous year. However, the CAGR was -8.9% for the period from 2014 to 2018, and fewer cruise visitors came in 2018 compared to 2014. In 2017, cruise visitor numbers fell by almost one-half (-47.8%). Enapor did not have an explanation for this decrease. Arrivals then grew by 8.1% from 2017 to 43,119 in 2018.

[102] Annex 6 has more information on the cruise visitor market, including historical statistics and a listing of ships that visit Cabo Verde.

Porto Grande is in Mindelo and the most important of the three ports. In 2018, it received 22,672 passengers and 39 vessels. A new cruise terminal is under construction. Once complete, Enapor estimates that Mindelo will receive about 75,000 cruise visitors annually.

Table 13 Cruise Arrivals: Porto Grande, Porto da Praia & Porto Novo – 2016-2018



Sources Enapor and Gilson Cruz Data Supply.

Information collected from tour operators and hotels combined with other market research provides insight into the Cabo Verde cruise segment. Annex 5 has more information:

- A representative of Intercruises, a company that is part of the TUI Group that handles the majority of tours from cruise ships in Mindelo, states that most of their clients are from TUI ships. Most of these clients are German or from other countries in Continental Europe. The typical age of cruise visitors is between 45 and 75 years old.
- Cruise visitors are interested in local culture and nature. Representatives of both Intercruises and Aventura, another tour company that serves the cruise market, said the most popular activities are island tours by minibus or jeep but other preferred activities are more cultural like dinner with live music and dancing, cooking classes, visits to churches and museums, visits to guitar ateliers, and tours of Mindelo's cultural center.
- ENAPOR estimates that 70% of cruise passengers visiting Cabo Verde disembark and that they spend about US$50 per day while on shore. The ships stay one to two days.
- Given that most cruise visitors to Cabo Verde are from Germany or other countries in Continental Europe they are likely to be interested in local experiences. Support for this statement comes a cruise study in Iceland that found that people from Continental Europe are more likely to take excursions than those from the U.K. or North American markets. Almost all German-speaking passengers (85-90%) took a shore excursion.[103]

[103] Segmentation and targeting in the cruise industry: an insight from practitioners serving passengers at the point of destination. Iryna Georgsdottir and Gunnar Oskarsson. April 2017. www.abrmr.com/myfile/conference_proceedings/Con_Pro_67307/conference_17325.pdf

6.5.4 Other Tourist Segments

Other tourist segments are small in size and have limited potential at the moment. They are described here because they are expected to grow and become more important:

- **Business Travelers** - According to the *2018 Institute of Tourism Expenditure and Satisfaction* report from INE, in 2018, about 21,000 visitors (2.7%) came to Cape Verde for Professional Purposes. In the future, Sal is expected to become more popular for the MICE (Meetings, Incentives, Conferences and Events) market. Cabo Verde Airlines, which privatized and sold 51% of its stocks to Icelandair, aims to establish Sal Airport as a hub in Western Africa, serving Africa, Europe and Latin America. The city of Praia on Santiago Island is also expected to develop as a business hub, attracting MICE clientele. Several projects are now under development. Should Sal and Praia develop into MICE destinations, more business travelers would likely purchase local experiences. According to Expedia Media Solutions, more business travelers are taking time to explore the destinations they visit. About 60% of business trips in 2017 were 'bleisure', combining business trips with leisure activities.[104]
- **Yachting -** The number of yachts arriving in Mindelo has been increasing each year, reaching 1,059 yachts in 2018. The high season starts in October and runs until February/ March. The high point of the season is November, the month of the regattas. Mindelo has two big regattas each year. The findings of a focus group held with captains who visited Bermuda for America's Cup suggest Cape Verde has strong selling features for this market. The captains said Bermuda's safety, privacy and natural assets like beaches, diving and historic sites are the island's strong selling features for this market.[105] Cape Verde has the same advantages.

7 Cabo Verde Tourism Supply

7.1 Accommodation Supply

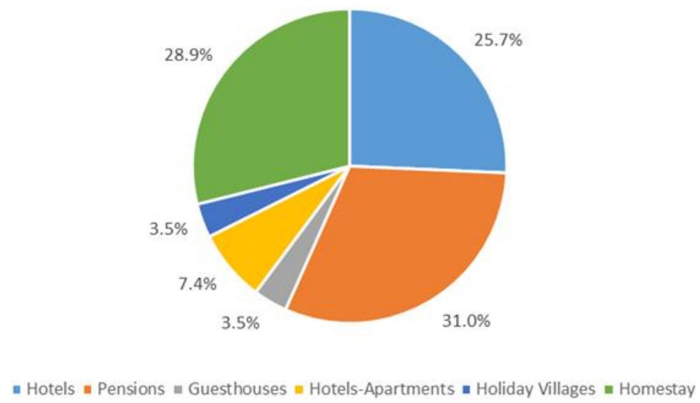
7.1.1 Types of Establishments

Table 14 shows that in 2018 there were 284 accommodation establishments in Cabo Verde. Pensions (31.0%) are the most common type, followed by homestays (28.9%), hotels (25.7%), and hotel-apartments (7.4%).

[104] Unpacking Bleisure Traveler Trends. Expedia Media Solutions. 2018.

[105] Bermuda Tourism Gazetter. Apr 3, 2018 posting. http://www.bermuda-online.org/accomm1.htm

Table 14 Cabo Verde Accommodation by Type of Establishment: 2018[106]

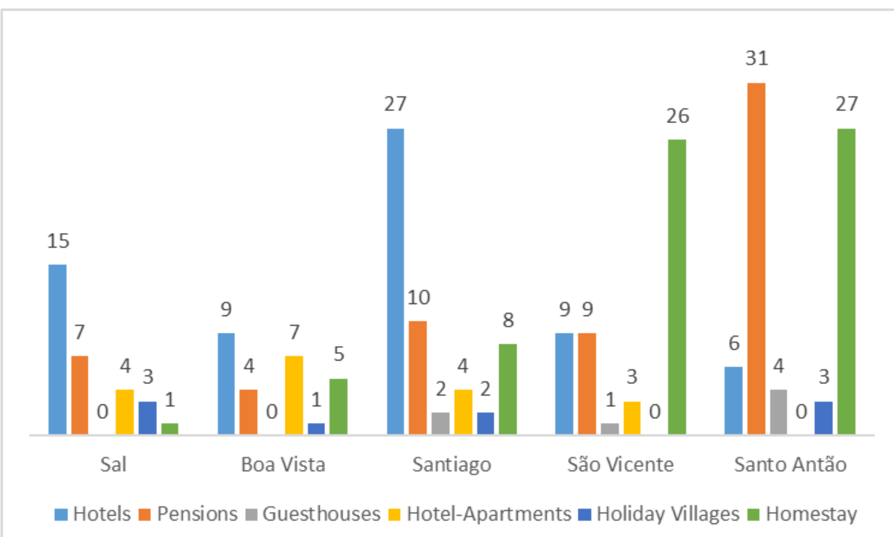


# of Establishments	
Hotels	73
B&Bs	88
Guesthouses	10
Hotels-Apartments	21
Holiday Villages	10
Homestay	82
Total	**284**

Source: Annual Inventory of Hotel Establishments. INE. 2018.

Table 15 has the distribution in 2018 of accommodation by type for the islands that draw the most tourists. It shows that Sal, Boa Vista and Santiago have more hotels than other types of establishments while São Vicente has more homestays. Santo Antão has more pensions than any other type of accommodation as well as many homestays. These five islands have 228 (82.9%) of the total 284 accommodation establishments in Cabo Verde.

Table 15 Cabo Verde Accommodation by Type for Select Islands: 2018



# of Establishments	
Sal	30
Boa Vista	26
Santiago	53
São Vicente	48
Santo Antão	71
Total	**228**

Source: Annual Inventory of Hotel Establishments. INE. 2018.

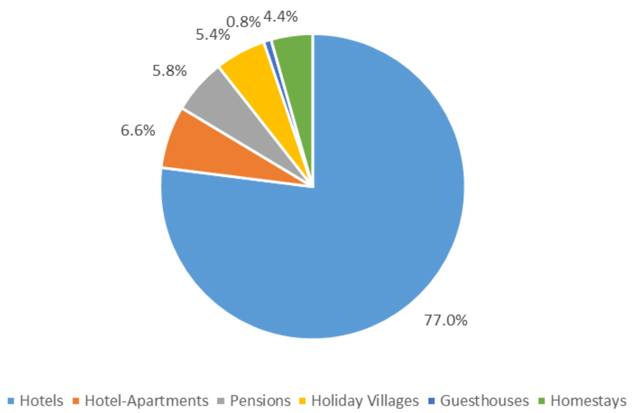
Appendix 7 has more detailed information on the number and type of accommodation establishments on each island in Cabo Verde.

[106] Pension is like a Bed & Breakfast. Homestay is where a local family shares their home with visitors.

7.1.2 Bed Capacity

In 2018, Cabo Verde had 21,046 tourist beds. Hotels comprised over three-quarters of the available bed capacity (77.0%), followed by hotel-apartments (6.6%), pensions (5.8%), holiday villages (5.4%) and homestays (4.4%).

Table 16 Cabo Verde Bed Capacity by Type of Accommodation: 2018

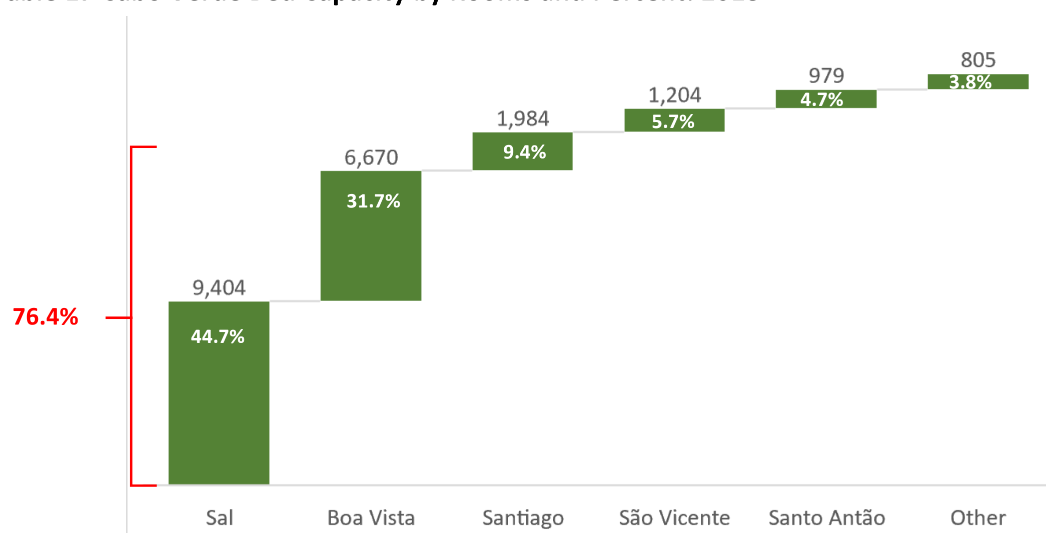


	Number of Beds
Hotels	16,193
Hotel-Apartments	1,393
Pensions	1,228
Holiday Villages	1,138
Guesthouses	174
Homestays	920
Total	**21,046**

Source: Annual Inventory of Hotel Establishments. INE. 2018.

In 2018, over three-quarters (76.4%) of the bed capacity was concentrated in Sal (44.7% with 9,404 beds) and Boa Vista (31.7% with 6,670 beds). Of the remaining bed capacity, Santiago had 9.4% (1,984 beds), São Vicente had 5.7% (1,204 beds), and Santo Antão had 4.7% (979 beds).

Table 17 Cabo Verde Bed Capacity by Rooms and Percent: 2018



Source: Annual Accommodations Inventory 2018 (INE)

Appendix 8 has more detailed information on bed capacity by establishment type for each island in Cabo Verde.

7.2 Local Experiences Assets

This section presents an overview of the assets that Cabo Verde has to support the development of local experiences. It covers the islands included in this study only -- Sal, Santiago, Santo Antão and São Vicente.

The assets include:

- Protected Areas -There are 48 protected areas in Cabo Verde. Natural Parks and Natural Reserves comprise at least 75% of the protected areas. They have many species of flora and fauna, some of which are endemic, and are of geological and geomorphological importance.
- Natural & Cultural Resources - The Portuguese-African blended Creole culture provides strong cultural offerings. From boat trips in Santo Antão's Tarrafal region to artistic expressions of music, dance and theatre and diverse landscapes such as the Paul Valley and the Fogo Volcano, there are many cultural and natural resources on the islands.
- Existing & Potential Tours & Activities – There are many existing and potential tours and activities of all types.

Tables 18 and 19 provide summaries and Annex 9 has more detailed information on these assets and what currently exists as a base for developing enhanced and new local experiences. They show a solid foundation of assets to support the development of local experiences.

Table 18 Cabo Verde Cultural and Natural Assets

Potential Tourism Products	
Sal	Beach tourism, water sports, diving tourism, whale and bird watching, health tourism (salinas), deep-sea fishing, sport fishing, cultural tourism (music festivals).
Santiago	Historical and cultural tourism, business tourism, political tourism, beach tourism, diving tourism, nature tourism, sport fishing.
Santo Antão	Adventure tourism, nature tourism, cycle tourism, ecotourism, food tourism, diving tourism, rural tourism, Science tourism.
São Vicente	Cultural and historic tourism, sand & sea, diving and aquatic sports, nature and adventure tourism, food tourism, and MICE
Protected Areas (most important for local experiences)	
Sal	Protected landscapes of Salinas, Pedra Lume, Cagarral and Buracona-Ragona
Santiago	Natural Parks of Serra Malagueta and Serra do Pico de Antónia
Santo Antão	Natural Parks of Cova, Ribeira da Torre and Ribeira de Paul; Cruzinha Nature Reserve
São Vicente	Natural Park of Monte Verde
Natural Assets (most important for local experiences)	
Sal	Santa Maria Beach; Salinas de Pedra de Lume (salt lakes); Buracona (Blue Eye, natural ocean pool phenomenon); Palmeira village
Santiago	Quebra Canela Beach; Serra Malagueta Mountain; Pico de Antónia Mountain; Tarrafal Beach
Santo Antão	Paul Valley; Coastal path of Cruzinha-Fontainhas; Tarrafal de Monte Trigo village; Ponta do Sol village
São Vicente	Monte Verde Mountain; Baía das Gatas Beach; Calhau village; Salamansa village

Cultural Assets (most important for local experiences)	
Sal	Cultural Cafe in Santa Maria
Santiago	Rabelados community; Tarrafal concentration camp; Old town of Cidade Velha; Fort and pillory at Cidade Velha.
Santo Antão	Historical hiking and walking paths
São Vicente	Fish and vegetables markets; National Centre for arts, crafts and design (CNAD); Mindelo Cultural Centre (CCM), Cavala Fest in Mindelo

Table 19 Cabo Verde Existing and Potential Experiences

Existing Experiences			
Sal	Santiago	Santo Antão	São Vicente
Bike&Hike Buracona (Blue Eye) Guided cycling Historical Sal tour Kitesurf, surf & SUP school Seadoo Safari Shark Experience The Beach School Project; Turtle walks	Badia Natural Cosmetics Rabelados community experience Tarrafal concentration camp.	Agritourism Cachupa cooking experience Canyoning Grogue (rum) experience; Lagedos Farm Project O Curral farm experience.	Cheese Factory Experience Grogue experience Guitar Workshop visit Hikes with traditional lunch Kizomba and Capoeira dance classes Seasonal events Social shopping experience Traditional Cape-Verdean meal
<u>All islands:</u> Cachupa experience, Home dinners, Cultural meal, Music and Food, Fish like a Cape-Verdean.			
Potential Experiences			
Day trip to Fogo from Sal and Boa Vista Downwind inter-island kiteboard trips Homestays Local experiences Package local events and festivals Romantic dinners & BBQs on beaches Stargazing Traditional Cape-Verdean nights	Bird watching Camping, glamping, backpacking Health & wellness experiences Stargazing Volcanology/seismic tours Tabanka (folk dancing and singing session) Local dances workshop with Raiz di Polon group Batuku dance lessons in Assomada community	Bird watching; Experiences around theatre festivals; Extending carnival Summer carnival Make guitars and ukuleles; Events- Behind the scenes/VIP experiences Social dining experience Traditional dance workshops Volcanology/ seismology	Bird watching Volcanology/seismic tours Health & wellness experiences; Sugar cane experience Drum ateliers visiting and making
<u>All islands:</u> Artists tour; Astronomy themed-tours; Bonfire night with traditional tales storytelling; Cape-Verdean food tasting ; Cape-Verdean poetry session; Clay workshop; Endemic plants experience; Fishing and barbecue at the beach; Local bar hopping experiences; Panu di terra experience; Community fish fry events; Social Dining; Social concerts; Traditional dance workshops, Behind-the-scenes and VIP experiences around local festivals and events.			

7.3 Challenges for Developing and Marketing Local Experiences

Section 3.7.2 identified challenges that destinations may encounter when developing and marketing local experiences. The findings of this study indicate that Cabo Verde would face such challenges and others, as outlined in Table 20.

Table 20 Challenges for Developing and Marketing Local Experiences

Government policies and regulations hamper ease of doing business.	Suppliers may lack ICT literacy and skills.
Financial system and services may constrain use of online marketplaces.	Internal transport systems and services hamper tourism development.
Licensing of tourism businesses can be complicated and challenging.	Inadequate technical and financial capacity of the Cabo Verde tourism administration.
Inadequate skills and qualifications limit business development.	Gender inequality may affect women's ability to take advantage of the opportunities.
Impediments exist in ICT capacity and quality.	Cabo Verde's destination marketing program is weak.

- **Government policies and regulations hamper ease of doing business.** The World Bank Group's Doing Business 2017 report ranks Cabo Verde 131th among 190 economies on the ease of doing business, with an EODB score of 55.95 out of 100. This score is significantly below other lower-middle-income countries, which have an average rank of 118. Cabo Verde's rank for starting a new business is also low at 116th with an EODB score of 83.51. The factors that hinder private sector development include inefficient government bureaucracy, high tax rates, and an inadequately educated workforce.[107] The World Economic Forum's (WEF) 2019 annual Travel and Tourism Competitiveness Index (TTCI), which ranks the competitiveness of travel and tourism economies, puts Cabo Verde at 63rd out of 140 countries for its overall Business Environment. Cabo Verde ranks poorly on factors such as time to start a business (100th), the cost to start a business (98th), and the profit tax rate (92nd).[108] Private sector businesses and associations interviewed also said that government policies and regulations hamper the business environment. The challenges include import taxes, customs costs and clearance times, changes to regulations and rules without notice, and an administration system that is not user-friendly.
- **Financial system and services may constrain the use of online marketplaces.** According to local stakeholders, access to credit is very selective, restricted and expensive in Cabo Verde, which constrains MSE development. There was no research conducted about financial regulations and systems related to participation in online marketplaces. However, there may be factors like lack of bank accounts or international payment restrictions that make it difficult or impossible for many people to sell experiences using the online marketplaces.
- **Licensing of tourism businesses can be complicated and challenging.** A bureaucratic and cumbersome system makes it complicated and challenging for tourism suppliers to get licensed. Representatives of TUI and Thomas Cook representatives said some good ideas for experiences have not gone forth because the suppliers have not been able to get licensed. Cabo Verde has licensing regimes for hotels, travel agencies and tour operators. Food establishments require food handling certification. In 2011, the

[107] Ease of Doing Business in Cape Verde 2018. World Bank. 2018. doingbusiness.org/en/data/exploreeconomies/cabo-verde

[108] Cape Verde Travel and Tourism Competitiveness Index 2019. World Economic Forum. 2019. http://reports.weforum.org/pdf/ttci-2019/WEF_TTCI_2019_Profile_CPV.pdf

government introduced licensing legislation for tour guides, but it not been implemented yet. Currently, DGTT is in the process of revising all tourism-related legislation and creating a consolidated Tourism Code. Consultations with DGTT and City Hall in Mindelo indicate that experiences such as teaching a handicraft or learning how to do something probably would not have to be licensed. However, licensing or authorization might be needed depending on the activities involved. For example, the boat operator of a "Fish like a Cabo Verdean" experience would need a license from the AMP (Agência Maritimo-Portuária). Making cachupa at one's home could involve food handling requirements. Authorization from the municipality is required when such activities take place in public places.[109]

- **Inadequate skills and qualifications limit business development.** Local persons and businesses must have entrepreneurial and business skills to develop and market local experiences. Although literacy rates are high in Cabo Verde, the World Bank Group's 2018 systematic country assessment found that the population lacks the skills and qualifications needed for the job and business market. One-half (50%) of businesses that participated in the 2009 Investment Climate Assessment said was a major business constraint. Many students do not complete secondary school. The available university programs and vocational education and training do not meet business needs.[110] The WEF's Global Competitiveness Index 2019 on qualification of the workforce ranks Cabo Verde 102nd of 140 countries[111], which also confirms that the population's lack of skills and training is a constraint for entrepreneurship and business development.
- **Impediments exist in ICT capacity and quality.** ICT infrastructure and services are critical for marketing local experiences through online marketplaces. In 2017, the International Telecommunication Union's ICT development index ranked Cabo Verde 4th in Africa (behind Mauritius, the Seychelles Islands, and South Africa) and 93rd in the world. Internet plans are relatively inexpensive in Cabo Verde, and mobile broadband subscription rates are high at 122 per 100 inhabitants. Well over half (57%) of the population use the Internet, and 62% of households have access to the Internet at home. These statistics are encouraging; however, the capacity and quality of the ICT infrastructure is weak and does not serve the users well. Outside the larger urban centers, coverage is patchy and unreliable. Some communities have no Internet due the mountainous terrain and their remote locations. As a result, the available bandwidth per Internet user is relatively low at 23,357 bits/second, far lower than the bandwidth available to users in South Africa (263,000), the Seychelles (63,500), or Mauritius (52,400).[112] WEF's TTCI 2019 report, ranks Cabo Verde 97th among 140 countries for use for business-to-consumer Internet transactions and 95th for business-to-business

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[109] Consultations with DGTT representatives.

[110] Cabo Verde - Systematic Country Diagnostic : Adjusting the Development Model to Revive Growth and Strengthen Social Inclusion. International Bank for Reconstruction and Development/ The World Bank. 2018.

[111] Cape Verde Travel and Tourism Competiteness Index 2019. World Economic Forum. 2019. http://reports.weforum.org/pdf/ttci-2019/WEF_TTCI_2019_Profile_CPV.pdf

[112] Data from International Telecommunications Union statistics pages for ICT Development for Cape Verde http://www.itu.int/net4/ITU-D/idi/2017/index.html?#idi2017comparison-tab

Internet transactions.[113] These weak links in Cabo Verde's ICT infrastructure and usage are impediments for digital marketing of local experiences. This bandwidth issue should be alleviated by the planned construction of a new submarine cable connecting Cabo Verde to a new telecom system between Brazil and Portugal. The European Investment Bank-funded project also will expand 4G networks coverage across Cabo Verde and improve home internet access.[114]

- **Suppliers may lack ICT literacy and skills.** Cabo Verdean entrepreneurs and business need basic ICT literacy and skills to participate in the online marketplaces. These skills include using the Internet, email, computers and simple word processing and spreadsheet programs. There was no current research found about the ICT capabilities of Cabo Verde's workforce. However, given challenges in the areas of lack of workforce skills and training and ICT impediments, it is likely that there is a lack of basic ICT skills.
- **Internal transport systems and services hamper tourism development.** Inter-island transportation challenges severely constrain tourism development outside of Sal and Boa Vista. BitnerAir, the only inter-island air carrier, has high fares and serves only some islands. Maritime transportation is costly and generally inadequate to serve the tourist sector. Although islands such as Santo Antão, São Vincente and Santiago are more naturally and culturally diverse and have more to offer visitors interested in local experiences, the transportation problems constrain the ability of entrepreneurs and tourism businesses on these islands to attract customers.
- **Cabo Verde tourism administration lacks the technical and financial capacity to support tourism development.** There is a lack of tourism technical knowledge and expertise at all levels of government. Strategic policy development and planning is weak at the national level, and there is little staff capacity to implement programs. Municipalities, Chambers of Commerce and tourism trade associations are asked to lead tourism development at local levels. However, they do not have adequate financial resources or tourism knowledge and skills. These gaps make it more difficult for Cabo Verde to take advantage of the opportunities afforded by the rising demand for local experiences and the online marketplaces as sales channels.
- **Cabo Verde's destination marketing program is weak.** Cabo Verde has a weak tourism image and is perceived to be a value-priced all-inclusive destination. Out of 140 countries, the 2019 Travel and Tourism Competitiveness Index (TTCI) ranked Cabo Verde 122nd for its country brand strategy and 64th for the effectiveness of marketing and branding to attract tourists.[115]
- **Gender inequality may affect women's ability to take advantage of the opportunities.** Through peer-to-peer marketplaces like AirbnbExperiences, women have the chance to offer local experiences, earn income and start businesses. However, gender inequality in the Cabo Verde could limit women's ability to take advantage of the opportunities.

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[113] Cape Verde Travel and Tourism Competiteness Index 2019. World Economic Forum. 2019. http://reports.weforum.org/pdf/ttci-2019/WEF_TTCI_2019_Profile_CPV.pdf

[114] EIB backs high-speed Cabo Verde internet and telecom connection. European Investment Bank. Jul 8, 2019. https://www.eib.org/en/press/all/2019-171-eib-backs-high-speed-cabo-verde-internet-and-telecom-connection

[115] Cape Verde Travel and Tourism Competiteness Index 2019. World Economic Forum. 2019. http://reports.weforum.org/pdf/ttci-2019/WEF_TTCI_2019_Profile_CPV.pdf

Women are largely responsible for domestic work, education of children and family care, which limits their ability to engage in paid work. The proportion of women in Cabo Verde that conduct paid work was lower than men (48% vs 61% in 2016). In rural areas only 42% of women have paid economic activities compared to 59% of men.[116]

8 Benchmarking Cabo Verde on Online Marketplaces

This section looks at how Cabo Verde measures up against other comparable destinations in terms of its presence on the major online marketplaces that sell tours and activities. The purpose of the benchmarking was to assess the extent to which Cabo Verde uses major online marketplaces compared to other destinations. The comparable destinations are Azores, the Canary Islands, Madeira, and Mallorca.[117] The marketplaces reviewed were the two top P2P marketplaces, AirbnbExperiences and GetYourGuide, and the two top OTAs, TripAdvisorExperiences (includes Viator) and Expedia.[118] A key finding was that Cabo Verde is present on only one of the four marketplaces, TripAdvisorExperiences (Viator).

8.1 Number of Listings

For each of the comparable destinations, calculations were made to determine the number of listings for every 10,000 visitors on each of the online marketplaces. Table 21 shows the results:

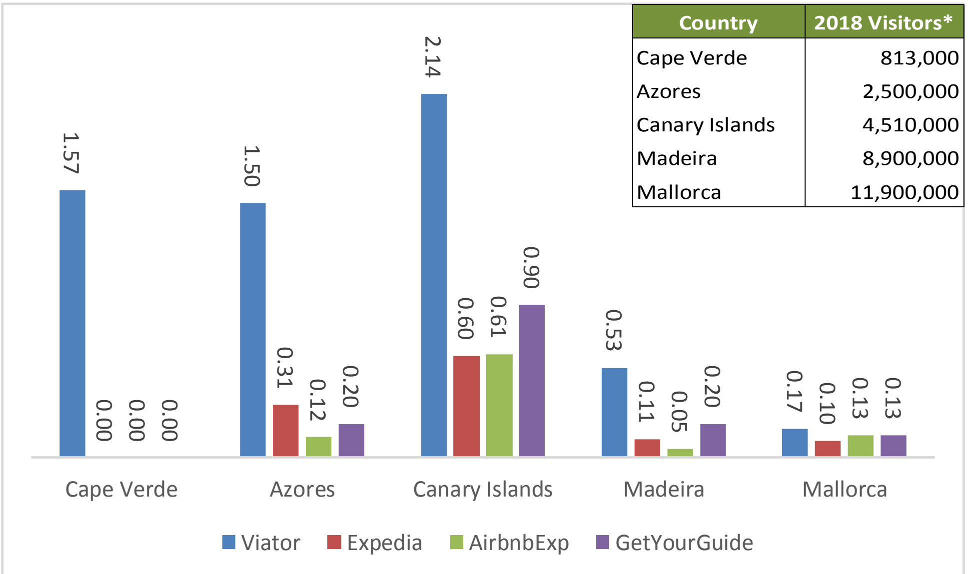
- Cabo Verde has no presence on AirbnbExperiences, GetYourGuide or ExpediaLocalExperts. The lack of listings on AirbnbExperiences is understandable since this platform has not launched in Cabo Verde yet. However, all of the comparable destinations have listings on the other two platforms and Cabo Verde should too.
- For all the comparable countries, the most popular marketplace is TripAdvisorExperiences (Viator). It has significantly higher ratios of listings than the other marketplaces. GetYourGuide appears to be the second most popular. AirbnbExperiences and Expedia seem to have about the same level of popularity.
- The Canary Islands have the strongest online presence of all, with a much higher number of tours and activities for every 10,000 visitors on every marketplace. For example, on TripAdvisorExperiences, the Canary Islands have 2.14 per 10,000 visitors compared to 1.57 for Cabo Verde, 1.50 for the Azores, 0.53 for Madeira, and 0.07 for Mallorca.

[116] Cabo Verde - Systematic Country Diagnostic : Adjusting the Development Model to Revive Growth and Strengthen Social Inclusion. International Bank for Reconstruction and Development/ The World Bank. 2018.

[117] These countries were chosen because they are similar to Cape Verde in several ways: they are Small Island Developing States, have the same main visitor source markets, and have with similar natural and cultural assets. An important factor is that all-inclusive tourism is the main segment in all of the countries, with the same dominant international tour operators (TUI and Thomas Cook) as Cabo Verde. Other countries that were considered and rejected included Cyprus, Morocco, Reunion Island and the Seychelles.

[118] The assessment is limited by the availability of data on the marketplaces. The websites use different layouts and categories of information. Also, the destination level data differs. In some cases, the listings are provided at a country level. In others, they are at regional or a city level within the destination. Finally, tours and activities can be listed in different thematic categories so there is duplication of listings. The results can only be considered to be indicative but nonetheless provide useful insight.

Table 21 Benchmark: Number of Listings per 10,000 visitors



* Sources: otacores.com, ine.cv, laprovincia.es, majorcadailybulletin.com, www.portsdebalears.com, caib.es
Based on analysis of websites between Apr 11-19, 2019

8.2 Types of Listings

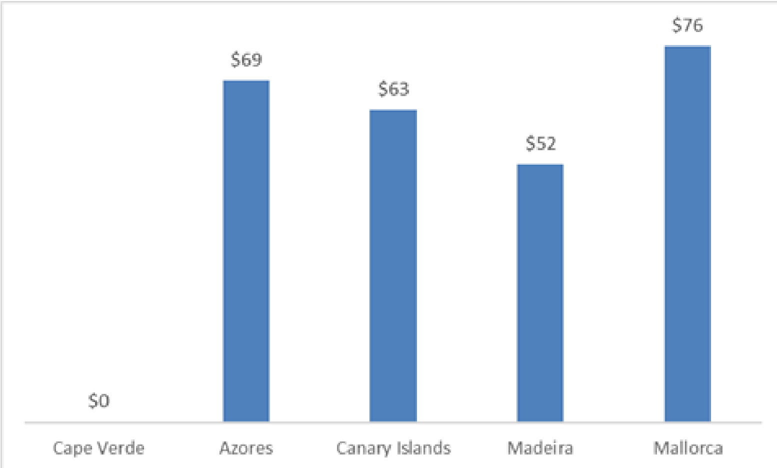
Information also was collected on the types of listings in each destination. The results are shown in the charts in Annex 9. In comparison to the other destinations, the only useful finding is that a gap in the product offer exists because Cape Verde does not have tours and activities of the AirbnbExperiences local experience type because this marketplace is not yet operating in Cape Verde. Otherwise, there were no discernable gaps or patterns of value detected. All of the destinations have a range of experience types.

8.3 Pricing

Pricing comparisons were made for AirbnbExperiences, TripAdvisorExperiences (Viator) and Expedia. The structure of the GetYourGuide website did not allow for the collection of pricing information for that marketplace.

Table 22 shows that Cabo Verde is not present on Airbnb Experiences. Of the comparable destinations, Mallorca had the highest average price (US$76), followed by the Azores (US$69), the Canary Islands (US$63) and Madeira (US$52).

Table 22 Benchmark: Pricing - AirbnbExperiences

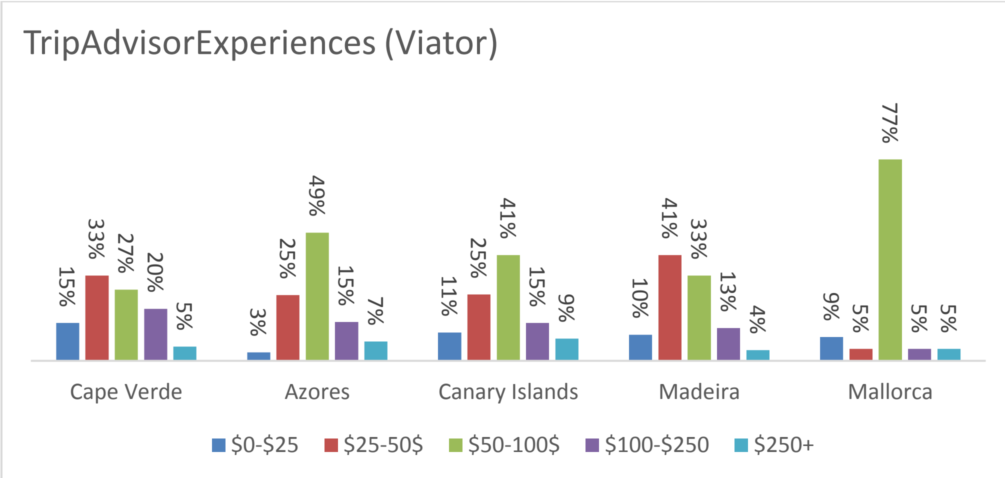


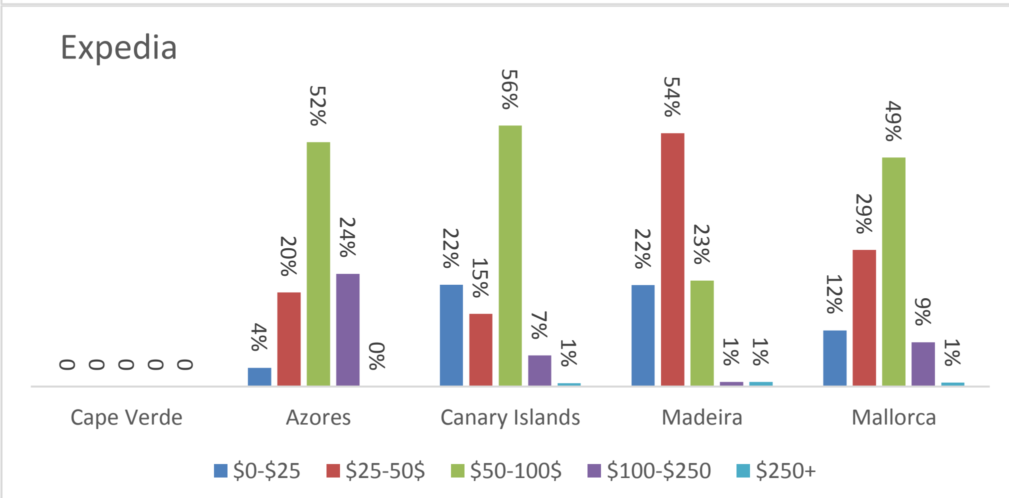
Source: Based on analysis of website between Apr 11-19, 2019.

Table 23 shows the results from the OTA sites:

- On TripAdvisorExperiences (Viator), Madeira has the highest percentage (51% combined) of tours and activities in the two categories priced under US$50. Cabo Verde (48%) is only slightly lower while the others are considerably lower - Canary Islands (36%), Azores (28%) and Mallorca (14%).
- As before, Cabo Verde has no presence on Expedia. For the other comparable destinations, the pricing pattern is the same as on TripAdvisorExperiences (Viator). Madeira has an even higher percentage (77% combined) of tours and activities priced under $50 compared to Mallorca (14%), the Canary Islands (37%) and the Azores (24%).
- On TripAdvisorExperiences (Viator), Cabo Verde shows higher percentages than the other destinations, except Madeira, of tours under US$100. However, it also shows higher percentages of tours over these $100 compared to all four other countries.
- Overall, it is difficult to say whether Cabo Verde has better prices or higher prices than the other destinations.

Table 23 Benchmark: Pricing – TripAdvisorExperiences and Expedia Local Expert





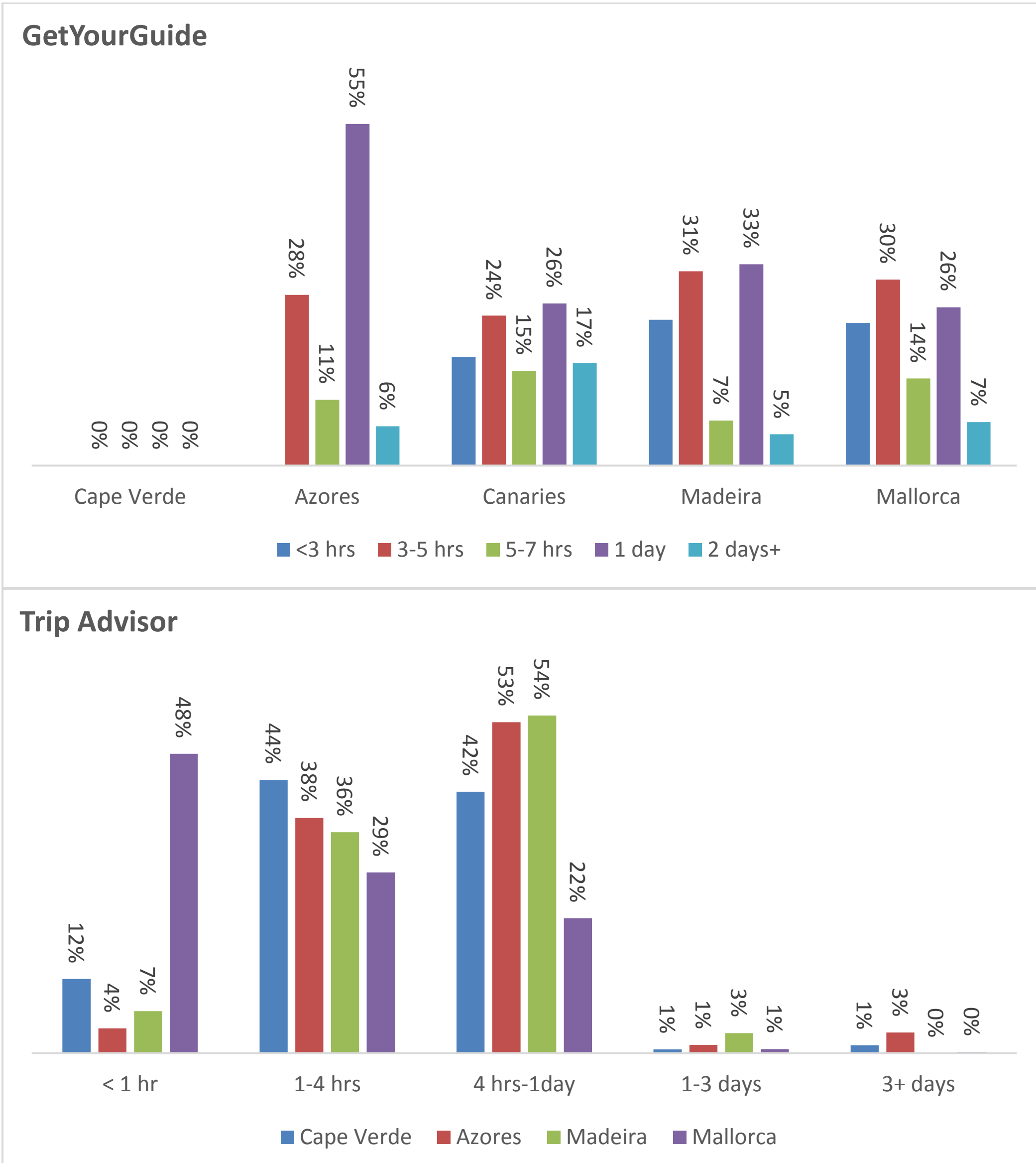
Source: Based on analysis of websites between Apr 11-19, 2019

8.4 Duration

Duration comparisons were possible only on the GetYourGuide site, as shown in Table 24. The structures of the AirbnbExperiences, TripAdvisorExperiences (Viator) and Expedia sites did not allow for the collection of data on duration. The TripAdvisor review site was reviewed to help fill this gap. The key results are:

- Cabo Verde does not appear on GetYourGuide. For the other countries, the majority of tours and activities are under a day.
- On the TripAdvisor site, the majority of tours and activities in all the countries are under one day. The most common durations are 1-4 hours (44%) and 4 hours-1 day (42%).
- The findings confirm that the project definition of a local experience, which specifies that the duration is one day or less, is appropriate.

Table 24 Benchmark: Duration - GetYourGuide & Trip Advisor



Source: Based on analysis of websites between Apr 11-19, 2019

8.5 Benchmark Assessment Conclusion

As stated in the introduction to this section, Cabo Verde has no presence on three of the four marketplaces reviewed. It does have a better presence on TripAdvisor Experiences (Viator) than all of the countries except the Canary Islands. However, overall Cabo Verde has a weak presence on the major tours and activities marketplaces. Steps should be taken to improve Cabo Verde's presence on these important new distribution channels.

9 Key Findings

9.1 Overall Findings

Overall, the key findings from this study are:

Potential and Benefits:

- The potential exists for Cabo Verde to develop and market local experiences through online marketplaces. Cabo Verde has a strong and growing tourism market, although the collapse of Thomas Cook Tours in September 2019 could negatively impact tourism growth in the near future. The trend to favouring experiences over things is driving increased market demand for local experiences among consumers generally, including the all-inclusive tourists that comprise the majority of Cabo Verde's tourism market. Local experiences can be more easily developed by Cape Verdean entrepreneurs and MSEs than other types of tourism products and services. The online marketplaces are growing in popularity and provide a sales channel through which the entrepreneurs and MSEs can offer local experiences directly to consumers. Taking advantage of these developments could help the government of Cabo Verde ensure that local persons obtain more of the benefits of tourism.
- Product development focussed on local experiences also may help the government diversify away from the all-inclusive visitor market segment over the longer term. Adventure travelers, already an important market for Cabo Verde, are interested in local experiences. Developing a portfolio of local experiences and promoting them through the online marketplaces as well as other channels could draw more adventure travelers to Cabo Verde (as well as other key market segments, such as millennials).
- Local experience-focussed product development may also help the government with its goals of improving the economic and social well-being of rural areas through tourism development. The islands of Santo Antão, São Vicente, Santiago and Fogo are more interesting from a cultural point of view and have more diverse assets than Sal and Boa Vista, making them more appealing to travelers interested in local experiences. Developing and marketing local experiences could help attract more visitors to these islands.
- The community and social impact dimensions of local experiences combined with the relatively low barriers to entry mean that other marginalized groups the government of Cabo Verde aims to target for economic and social well-being improvement-- like women, youth and the unemployed-- also can benefit from this sort of tourism.

Product Development:

- With capacity building and support, non-professional tourism entrepreneurs and MSEs could enter the tourism value chain directly through AirbnbExperiences.
- Professional tour operators and other experience suppliers can market on AirbnbExperiences and other major marketplaces, beginning with TripAdvisorExperiences and GetYourGuide. The professional suppliers could be encouraged to partner with non-professional entrepreneurs and MSEs for joint development and marketing of local experiences.

- To accommodate non-professional AirbnbExperiences-type suppliers, the consolidated Tourism Code that the government of Cabo Verde is developing would have to include appropriate licensing and regulation systems. Many tourism DMOs recognize that licensing systems must be modernized to accommodate the new classes of accommodation and experience suppliers born by the rise of peer-to-peer tourism and online marketplaces. Cabo Verde can be a policy leader in Africa and beyond if the government develops a licensing system that ensures the safety of guests but which is overly cumbersome or costly for local entrepreneurs and MSEs to obtain.
- Local entrepreneurs and MSEs, especially marginalized groups like women and rural communities, face a range of challenges when developing and marketing local experiences. Support programs are needed, similar to the financial and technical assistance programs described in the Bermuda and Airbnb Africa Academy case studies. Another support program is the Jamaica government's Rural Economic Development Initiative (JSIF-REDI), which is funded by the World Bank and has developed a portfolio of CBT experiences.[119] It provides a model for Cabo Verde's government to consider for the *Uma Família, Um Turista* initiative.

Marketing:

- There are gaps in basic ICT skills that must be addressed so local entrepreneurs and MSEs can work effectively with online marketplaces. The Airbnb Africa Academy, the World Bank-supported program that is assisting with the development of local experiences in South Africa, encountered similar gaps. The program is testing one possible solution to the challenge, which also could work in countries like Cabo Verde. It involves having a tech-savvy third party who helps hosts of local experiences manage their online marketplace listings in return for a commission.[120]
- Cabo Verde has a presence on only one of the four major online marketplaces reviewed. The government of Cabo Verde should address this gap by supporting local suppliers so they can develop experiences and sell them on the online marketplaces. And, it is equally important that other complementary actions are taken by the government that can improve the online visibility of local experiences and of Cabo Verde as a destination that offers local experiences. Similar to the Bermuda case study, these actions include developing training and marketing partnerships with key online travel companies like Trip Advisor, Google and Airbnb to implement search and social media marketing strategies.
- Incorporating an emphasis on local experiences in Cabo Verde's destination marketing efforts could help to diversify the tourism product supply, achieve differentiation from competitors, and build an image for Cabo Verde as an experiential destination. Jamaica is an example of a destination that has incorporated a community-based tourism brand. The Jamaica Tourist Board uses the brand https://www.visitjamaica.com/more-to-jamaica/ to help with diversification.

[119] JSIF-REDI project boosts Jamaica community tourism standards and capacity. ETurboNews. Aug 3, 2017. https://www.eturbonews.com/161076/minister-bartlett-jsif-redi-project-boosts-jamaica-community-tourism-standards-capacity.

[120] Personal Communication with Hermione Neville, IFC, World Bank. May 2019.

Building on these key findings provided below are the key findings from the study related to the four key questions the study seeks to address.

9.2 Local Experiences Development Potential

9.2.1 Types of Local Experiences

The first question to be answered is: Does Cabo Verde have the potential to develop local experiences, and what types of local experiences could be developed?

The definition in Section 2.3 states that a passionate and knowledgeable local host is a defining characteristic of a local experience. For Cabo Verde, an important factor for success will be to identify suitable local hosts -- both individual entrepreneurs and MSEs -- and to support them to develop and market their special local experiences. The ideal hosts are persons who are knowledgeable and passionate, who epitomize Cabo Verde's "Spirit of Morabeza", and are eager to share with their culture, history, food and music with visitors. Given that Cabo Verdeans are known for their morabeza and hospitality, identifying such hosts would not be difficult. Many of the persons met during the field trip fit this profile.

The research provided in Section 6.2 shows that Cabo Verde has a wealth of natural and cultural resource assets and existing and potential tours and activities. These provide a strong foundation upon which local hosts can develop unique Cape Verdean local experiences. Many ideas for local experiences were identified based on input from local stakeholders and other research. Annexes 5 and 9 have lists of the ideas.

The following are examples of the types of local experiences that are suitable for non-professional tourism suppliers. A common theme in all of the examples is that they involve low-risk activities and the local experience supplier acts like a cultural host or ambassador who introduces the visitor to the Cape Verdean culture and way of life.

- Food experiences: Social dining, where locals meet visitors at a restaurant or other licensed food venue to break bread together and share about Cabo Verde's culture. Alternatively, the local host can buy food from a licensed business and take it to their home, a park, or other space. Other options can include visits to produce, fish and other markets, possibly paired with a shared meal in a restaurant.
- Music: Taking guests to venues and sharing information about local music and musicians. These include social concerts, where a licensed venue has a small concert, and the local host invites visitors to go with them.
- Performing Arts: Taking guests to a local dance or theatre event, meeting local dancers or actors, and learning about the local culture.
- Arts & Culture: Similar to music except that the local host takes guests to visit museums, art galleries, artist studios or artisan cooperatives and the like to meet local and share culture. Options include visits to markets, etc.

- Shopping: Social shopping experiences where visitors meet the stallkeepers at a market or the owners of local stores, taste or view their wares, and learn about their passions. These experiences have the double benefit of generating shopping activity.
- Active: Around sport or exercise, such as where a host takes a guest for a run or a hike or to a local sporting event and combines it with sharing of the culture.
- Social Impact Experiences: Experiences developed by not-for-profit organizations within the above themes.

Some activities that non-professional local hosts should avoid are:

- Higher Risk Adventure Activities: Motorized or higher risk adventure activities such as snorkelling, rock climbing and rappelling.
- Transportation: The host can use taxis or other licensed transportation services to avoid having to get a license to transport guests.

For professional licensed experience suppliers, the list of potential local experiences that they could offer is limitless. They could offer experiences within all the above themes, including adventure and transportation, assuming they have the appropriate qualifications and licenses.

Several samples have been developed to illustrate the types of local experiences that Cape Verde suppliers could offer. The samples focus on Mindelo and on themes that have particularly good potential for Cabo Verde- music, food, art and artisanship.

Cook Cape Verdean Food with Tchicau at Her Home

- **Theme:** Food
- **Duration:** 3 hrs
- **Host:** Tchicau is a natural born chef. She started cooking for her big family and neighbors in the Mindelo's Alto Solarino neighbourhood. She was soon discovered by hiking groups that started coming to her terrace for dinner. The feedback is always amazing. Tchicau cooks with her soul.
- **What we'll do:** You will accompany Tchicau on her daily shopping trip to the vegetable and fish markets. Then you will go to her kitchen and learn how to cook a traditional Cape Verdean dish. The finale is eating the delicious meal!

The Music of Cabo Verde

- **Theme:** Music
- **Duration:** 2 hrs
- **Host:** My name is Helena. I am Portuguese but have lived in Mindelo for the past decade. It's where I feel at home. One of things I love the most about this little town is that is filled with friendly people who love to share Cape Verde's music with visitors.
- **What we'll do:** I will take you on a music tour around the cultural center of Mindelo. We will visit the museum of Cesária Évora, where you will learn a bit about the life of this iconic singer. Then we will visit a guitar workshop where you will have a private concert with short examples of the different types of music that exist on the islands, such as *morna*, *coladera* and *funaná*. You can even learn how to dance to these styles of music! The tour will end at a nice restaurant where you can have dinner with live music.

Make Your Own Stone Souvenir with Albertino Silva

- **Theme:** Art
- **Duration:** 3 hrs
- **Host:** Albertino Silva, Mindelo acquired his artistic skills by experimenting with various tools and materials. Free-spirited and creative, he is happiest when people appreciate his work.
- **What we'll do:** In this workshop, you will know the basis of working with stone and create your own souvenir of Mindelo – with the help from Albertino of course! It can be a keychain, a necklace pendant, or a paperweight. This is a unique opportunity to learn one-on-one from this amazing artist.

Explore the Artist Studios of Ribeira Bote

- **Theme:** Art and community
- **Duration:** 2 hrs
- **Host:** My name is Helena. I am Portuguese but have lived in Mindelo for the past decade. It’s where I feel at home. One of things I love the most about this little town is that is filled with friendly artists who love to share their art with visitors.
- **What we’ll do:** We will visit the community of Ribeira Bote, where we will explore the graffiti-filled streets and visit studios of community artists create beautiful art pieces and Carnaval props work with materials such as stone, foam, wood, clay and leather, creating. The community tourism center of Ribeira Bote receives a portion of the proceeds from each tour .

9.2.2 Priority Locations

The study provides insight into the priority locations for local experience development:

- With 49.5% of tourist arrivals and 54.8% of hotel nights in 2018, Sal has the lion's share of tourism volume, making it the priority location for local experience development. Boa Vista, which had 26.9% of tourist arrivals and at 36% of hotel nights also would seem to be a priority location, although it was not visited and assessed during the study. These two islands received more than three-quarters of visitor arrivals and over 90% of hotel nights in 2018. They also have good ICT access, a critical factor for online marketing. The volumes of tourists Sal and Boa Vista each receive makes it easier for suppliers of local experiences on these islands to draw sufficient customers to achieve financial viability. The experience of Rastafari Indigenous Village (RIV) https://rastavillage.com in Jamaica provides evidence to support this approach. RIV is located just outside Montego Bay, a main tourism destination in Jamaica and one that is dominated by all-inclusive and cruise tourism. RIV community members offer different local experiences around themes such as soap making, food, herbology, drumming and jewelry making. RIV receives hundreds of visitors from these market segments each year, many of which come because they were seeking a local social impact experience. RIV also receives TUI tour and cruise ship groups on weekly basis.[121]
- As the cultural capital of Cabo Verde, Mindelo on São Vicente is another priority destination for local experiences development. Mindelo has a healthy cruise visitor market, which will grow with the completion of the new cruise ship terminal. It also receives adventure tourists. There are several excellent cultural partners with which to create experiences in Mindelo including the National Centre of Art Crafts and Design CNAD (which will be re-opening in 2020) and the Cultural Center of Mindelo. These factors provide excellent potential for success.
- Santiago and Santo Antão islands have good potential but are hampered by low visitor numbers. These islands should be ranked second in importance behind Sal, Boa Vista and Mindelo given Cabe Verde's financial and technical constraints. Some local experiences already exist. They give visitors a Cape Verdean regional experience and enable interactions with locals, reaching into the rural and more remote areas. Thematic opportunity areas include food, artisanship, agriculture, birdlife, Cape Verdean culture and every day Cape Verdean life. Local experiences could be created around Santiago's slave trade history, the UNESCO World Heritage site of Cidade Velha, the community of the Rabelados, the Campo da Morte Lenta concentration camp at Tarrafal, and the museum and performing and visual arts culture of Praia. The priority for these islands should be the development of local experiences along the hiking trails, similar to the Jordan Trail project and the Abraham Path project in the Middle East.

[121] Based on communication with Rastafari Indigenous Village and consultant's knowledge gained by working on the JSIF-REDI project.

9.3 Demand for Local Experiences

9.3.1 Potential Market Demand and Value

The second question to be answered is: What is the potential market demand for local experiences in Cabo Verde?

To help answer this question, the potential demand for and value of historical/cultural tours and activities in Cabo Verde was estimated for the period from 2018 to 2023. Historic/cultural tours and activities was used because online marketplaces list most local experiences under this category. The types of local experiences that have the best potential Cabo Verde and are more suitable for non-professional local hosts, as listed in the preceding section, would fall into this category.

As shown in Table 25, the potential demand in 2018 for historical/cultural tours and activities was estimated based on INE and Enapor data, research from the study and other research:

- **Step 1:** The size of the total inbound visitor market was estimated based on data provided by Enapor and in INE's *2018 Inquiry of Tourist Expenditure and Satisfaction.*
- **Step 2:** An estimate was made of participation by visitors in 2018 in all types of tours and activities using assumptions based on research from the study. The resulting estimate is that 54.6% of all leisure tourists and cruise visitors would have participated in at least one tour or activity while in Cabo Verde. In total, they would have purchased just over 422,000 tours and activities.
- **Step 3:** The potential demand for Historic/Cultural Tours in 2018 was estimated using tours and activities participation rates from other destinations. For the cruise segment, no data are available from Europe, so the participation rates from surveys by the Florida-Caribbean Cruise Association in Caribbean cruise destinations. For the other visitor segments, participation rates were estimated based on surveys of the U.K., German, French and U.S. markets that were conducted by Arival Travel.

The resulting estimate of potential demand is that 14.5% of all 2018 leisure tourists and cruise visitors might have participated in at least one historic/cultural tour or activity while in Cabo Verde in 2018, if there were more such historic and cultural tours available. In total, they would have purchased almost 112,000 such tours and activities. The estimate is hypothetical because it assumes that Cabo Verde has historic/cultural tours and activities to draw visitors, but in reality, there are few tours and activities. Again, the idea is to get a sense of what the market demand might be if there were more historic and cultural tours available.

A participation rate of 14.5% is reasonable since the research shows much higher rates for historic/cultural tours and activities. The Arival survey information reviewed in Section 3.6 found participation rates at about 52% to 65% for such tours and activities among tourists from the U.K., France, Germany and the U.S. For the cruise market, the Florida-Caribbean Cruise Association estimates for participation rates in such tours in Caribbean destinations range from 30% to 80%, with the average being 40% to 50%.[122]

[122] *Economic Contribution of Cruise Tourism to the Destination Economies: Vol II.* Florida-Caribbean Cruise Association. October 2018.

Table 25 Estimated Demand for Historic/Cultural Tours: 2018

Step 1: Size of Cabo Verde Market Segments	
Cabo Verde Visitor Segments Size	2018 (est)
Cabo Verde Market Sizes	
Total Tourist Arrivals	771,355
Leisure Tourists (94.2% of Tourist Arrivals)[1]	726,616
Packaged Tourists (81% of Tourist Arrivals, of which 75.8% is All-inclusive Package)[1]	624,798
Tourist Visitor Segments Size	
All-inclusive Packaged Tourists	584,687
Other Packaged Tourists	40,111
Other Leisure Tourists (Leisure - Packaged)	101,819
Total Leisure Tourist Segments (94.2% of Tourist Arrivals)	*726,616*
Cruise Visitor Segment Size	
Cruise Visitors[2]	47,094
Total Leisure Tourist and Cruise Visitors	**773,710**
Step 2: Size of Cabo Verde Market for All Tours & Activities	
All Tours & Activities Participation	
All Tours & Activities	
All-Inclusive Packaged Tourists (>50% of Total All-Inclusive Packaged Segment)[3]	292,344
Other Packaged Tourists (65% of Other Packaged Vistors)[4]	26,072
Other Leisure Tourists (65% of Other Leisure Segment)[5]	66,182
Cruise Visitors (57% of Cruise Segment)[6]	37,724
Total All Tours & Activities	***422,322***
Participation in All Tours & Activities (% of Total Leisure Tourist & Cruise Visitors) [7]	***54.6%***
Step: 3 Size of Potential Cabo Verde Market for Historical/Cultural Tours	
All-Inclusive Packaged Tourists (20% of Total All-Inclusive Packaged Participation)[8]	58,469
Other Packaged Tourists (50% of Other Packaged Tourists Participation)[9]	5,214
Other Leisure Tourists (50% of Total Other Leisure Segment Participation)[10]	33,091
Cruise Visitors (40% of Cruise All Tours & Activities Participation)[11]	15,090
Total Historical/Cultural Tours & Activities	***111,864***
Participation in Historic/Cultural Tours (% of Total Leisure Tourist & Cruise Visitors) [12]	***14.5%***

Notes:

1) Percentages drawn from *2018 Inquiry of Tourist Expenditure and Satisfaction.* INE. 2018.
2) Source: *Consolidated Statistics* , December 2018. ENAPOR. 2018.
3) Based on all-inclusive tour operator interviews (50% +buy tours and activities).
4) Based on adventure travel/niche tour operator interviews (most packages include tours and activities).
5) Assumed to be similar to Other Packaged Visitors.
6) Percentage Based on *Economic Contribution of Cruise Tourism to the Destination Economies: Vol I* . Florida-Caribbean Cruise Association. 2018. (No data is available for Europe cruise markets.)
7) Participation rates of 54.6% is reasonable given: i) U.K., French and German markets comprise almost one-half (48.1%) of Cabo Verde's visitors, and; ii) Arival.travel surveys found participation rates in tours and activities among visitors from these countries while on a trip at 97-98%, with an average of seven (7) tours and activities per person per
8) Arival surveys say participation in such tours is 52-65% for U.K., German, French and U.S. leisure visitors. All-inclusive market assumed to have much lower participation rate.
9) Arival surveys say participation in historical/cultural tours is 52-65% for U.K., German, French and U.S. leisure visitors.
10) Assumed to be similar to Other Packaged Visitors.
11) Based on CLIA surveys in Caribbean (30-80% participation in such tours depending on country, average is 40-50%).
12) Participation rate of 14.5% is reasonable given: i) Arival survey presented in Section 3.6 found participation rates for historic/cultural attraction to be much higher among tourists from the U.K., France, Germany and the U.S. to be much higher, at about 52-65%. For cruise market, the *Economic Contribution of Cruise Tourism to the Destination Economies: Vol II,* found a 30-80% participation rate in such tours in Caribbean destinations. (No data is available for Europe cruise markets.)

Based on the estimated participation rate in 2018 of 14.5%, the potential demand was estimated for historical/cultural tours in Cabo Verde for the period from 2019 to 2023. An annual visitor growth rate of 3.6% was used, as per the World Bank Group's projection for Cape Verde for 2019 to 2030. After projecting the potential number of tours and activities sold, conservative and optimistic projections were made of the potential value of the historic/cultural tours and activities market:

- **Conservative:** Uses an average per person price of US$23, based on the US$23 price of sample CBT products in Africa given in the World Bank Group's *2018 Demand Analysis for Tourism in African Local Communities* report.
- **Optimistic:** Uses an average per person price of US$50, which is assumed to be reasonable given the findings of the benchmarking research which found the average prices for experiences on AirbnbExperiences to US$76 for Mallorca, US$69 for the Azores, US$63 for the Canary Islands, and US$52 for Madeira (see Section 7.3). Also, in 2019, TourScanner found an average price of US$157 for 10,000 bookings of daily or 2-day/3-day tours.[123]

Table 26 has the results, and shows potential demand of about 116,200 tours and activities in 2019, rising to 133,900 tours and activities in 2023. In 2019, the conservative and optimistic projections of market value are about US$2.7 million and US$5.8 million, respectively. In 2023, the projected market values are about US$3.1 million and US$6.7 million, respectively. These results indicate that considerable unmet demand exists for historic/cultural tours and activities in Cabo Verde. They also suggest lost economic opportunities for local entrepreneurs and MSEs in Cabo Verde.

Table 26 Estimated Demand and Value of Historic/Cultural Tours in Cabo Verde: 2019-2023

	2019	2020	2021	2022	2023
Total Tourist Arrivals[1]	799,124	827,892	857,696	888,573	920,562
Cabo Verde Leisure Tourist & Cruise Visitors					
Leisure Tourists (94.2% of Tourist Arrivals)[2]	752,775	779,874	807,950	837,036	867,169
Cruise Visitors[1]	48,789	50,546	52,365	54,251	56,204
Total Leisure Tourists and Cruise Visitors	*801,564*	*830,420*	*860,315*	*891,287*	*923,373*
Potential Demand for Historic/Cultural Tours (14.5% of Total Leisure Tourists & Cruise Visitors)	**116,227**	**120,411**	**124,746**	**129,237**	**133,889**
Conservative Value of Historic/Cultural Tours US$ (US$23 per person average price)[3]	**$2,673,216**	**$2,769,452**	**$2,869,152**	**$2,972,441**	**$3,079,449**
Optimistic Value of Historic/Cultural Tours US$ (US$50 per person average price)[4]	**$5,811,339**	**$6,020,547**	**$6,237,287**	**$6,461,829**	**$6,694,455**

Notes:
1) Annual growth rate of 3.6% assumed, as per World Bank Group estimate in *Strengthening Linkages with the Tourism Supply Chain in Cabo Verde* .
2) Leisure Tourists as percent of Total Tourists assumed to remain at 2018 level of 94.2%
3) $21 to $23 is the cost of sample CBT products in the World Bank Group's 2018 *Demand Analysis for Tourism in African Local Communities report.*
4) $50 average price based on prices in comparable destinations on AirbnbExperiences, which were US$76 for Mallorca, US$69 for the Azores, US$63 for the Canary Islands, and US$52 for Madeira.

[123] TourScanner Annual Report 2019. Tour Scanner. April 2019. https://tourscanner.co/tourscanner_report_2019.pdf?x87060

9.3.2 Increasing the Demand for Local Experiences

Adventure travelers, a smaller but important market segment for Cape Verde, are very interested in local tours and activities. Most of these travelers are from Continental Europe countries like Germany, France, the Netherlands and Belgium. There could be more demand for local experiences if more adventure travelers from Europe can be attracted.

There are indications that the European market has good growth potential for Cabo Verde, and that it can be reached through the online tours and activities marketplaces. These indicators include:

- Europe is now the world's travel's largest regional online travel market. Online penetration will exceed half of all travel purchased in 2019 (51%). OTA bookings reached EUR47.9 billion in 2018 and are expected to continue growing. OTA mobile bookings are projected to grow rapidly, with over a third of European OTA bookings done on mobile websites and apps by 2022.[124]
- There are good and reasonably priced air connections from the Continental Europe markets to Cape Verde on TAP Airlines and charter flights operated by TUI Fly and the TUI-owned Thompson Fly.[125]
- The Centre for the Promotion of Imports from developing countries (CBI), which assists developing countries entering the European markets, found that in 2016 over 13% of all outbound trips (60 million trips) from Europe were to developing countries. Relatively new and further away developing country destinations had the highest growth rates because European travelers are increasingly looking for new, authentic destinations and experiences. Countries in Africa were the second most popular destination, with a market share of 22%. Themes that European travelers are attracted that are relevant to Cabo Verde local experiences include adventure travel, birdwatching, community tourism, food tourism, trekking trips and volcano tourism. There is an overall and growing trend among European travelers toward more interaction with locals.[126]

9.4 Marketing Potential of the Online Marketplaces

The third question to be answered is: Can Cabo Verdean local experiences be promoted and distributed using peer-to-peer and OTA online marketplaces, such as AirbnbExperiences, GetYourGuide, TripAdvisorExperiences (Viator) and Expedia?

The research in Sections 3.4 and 3.5 confirms that these types of marketplaces are strong distribution channels for suppliers of local experiences. The online travel companies are investing heavily in the sector and there is rapid growth in listings and bookings just since early 2018. None of these marketplaces have exclusive partnerships with destinations, so it is

[124] Phocuswright's Europe Consumer Travel Series 2018 updates: 1) https://www.phocuswrighteurope.com/News/2019/A-286B-euro-travel-market-sets-the-stage, https://www.phocuswright.com/Travel-Research/Research-Updates/2019/Despite-challenges-OTA-bookings-continue-to-climb-in-Europe, https://www.phocuswright.com/Travel-Research/Research-Updates/2019/3-Largest-European-Markets-By-the-Numbers

[125] Thomas Cook went into receivership on September 23, 2019, so the flights are no longer operating.

[126] Attracting Tourists from Europe. Center for Promotion of Imports from Developing Countries. Various reports. https://www.cbi.eu/market-information/tourism

possible to work with any and all of them. In terms of working with the major marketplaces, key findings for Cabo Verde are:

AirbnbExperiences:

- Of the major marketplaces reviewed, AirbnbExperiences is the only one that sells local experiences hosted by non-professional entrepreneurs and MSEs.
- There is a commitment to community tourism development, as demonstrated by the US$1 million dedicated to the Africa Academy Program.
- The listing policies, particularly for social impact experiences, are more local-friendly.
- Airbnb provides public liability insurance for hosts of experiences, which is otherwise not affordable for most local hosts.
- Hands-on or online support and training materials are available. For example, destinations can use the African Airbnb Academy toolkit and other Airbnb toolkits and can get permission to translate these tools.[127]
- The above points make AirbnbExperiences a key online marketplace partner for Cabo Verde.
- AirbnbExperiences representatives indicate they are open to a request from the government to launch AirbnbExperiences in Cabo Verde. The launch could begin by having a Market Manager from Experiences stage a meetup session with existing and interested local tourism suppliers, either in person or online. The suppliers would learn how to use the platform and how to adapt their products for AirbnbExperiences.

TripAdvisorExperiences (Viator):

- This largest and most important marketplace has a strong focus on experiences. Cabo Verde already has a presence on TripAdvisorExperiences.
- It is another priority partner, but it only works with professional tour suppliers. Non-professional local hosts would not be able to work with this marketplace unless they worked through a licensed and insured professional supplier.
- Cabo Verde can build its presence on TripAdvisorExperiences by encouraging and supporting professional tour suppliers to list their products.
- TripAdvisor has online training materials to assist suppliers with listing and promoting their businesses.
- There are opportunities to partner with the TripAdvisor Review site to help build awareness and drive business to suppliers of local experiences (see Section 8.4.1 for more information).

GetYourGuide

- Their local guide focus, size and dominance of the European tours and activities online marketplace makes Get Your Guide an important marketplace for Cabo Verde.
- Given GetYourGuide's strict vetting of guides and their requirement that guides show proof of public liability insurance, non-professional local hosts will not be able to sell on

[127] See https://www.airbnbcitizen.com/south-africa/airbnb-africa-academy/the-airbnb-africa-academy-toolkit/ and https://airbnb-experience.schoolkeep.com/my_toolkits (Note: you must be logged into an Airbnb user account to access the latter).

this platform. However, GetYourGuide is a good distribution channel, and more professional suppliers should be encouraged to list their tours and activities.
- There may be opportunities have some “GetYourGuide Originals" in Cabo Verde, the new branded tours and activities now being sold. They are partnerships between GetYourGuide and professional tour operators.

Other Marketplaces
- ExpediaLocalExpert, YourLocalGuide and WithLocals do provide other marketing channels for more professional tour suppliers. However, the former is more focused on the mainstream tourism markets while the latter two are very small. At this time, it would be better for Cabo Verde as a destination to focus on AirbnbExperiences, TripAdvisorExperiences and GetYourGuide.
- Musement is not yet operating in Cabo Verde but given that TUI owns it could become important for Cabo Verde in the future.
- BookingExperiences is in early development stage. It will be important in the future, and its progress should be monitored.

9.4.1 Complementary Digital Marketing
Some persons interested in hosting local experiences might only wish to earn a little extra income and may be able satisfied with the volume of customers they get from online marketplaces. However, others might want to establish a full-time business or at least to increase the number of customers, which means they will need to use other distribution channels beyond the online marketplaces for selling their experiences.

It is important to take advantage of opportunities to raise awareness of Cabo Verdean local experiences by working with major online travel companies since they are linked to the online marketplaces and offer additional marketing opportunities. Working with these companies also is important for Cabo Verde's overall destination marketing.

Google:
Google dominates the Internet for search and is also an important review site. It now wants to dominate the online travel sector using its enormous meta-search capabilities. In 2018, Google began testing the tour and activities sector by launching Touring Bird through its startup incubator, Area 120. In 2019, “Google Travel” was launched which gives travelers a one-stop shop for flights, hotels, vacation rentals, packages, and destination research. It is expected that Google will continue making inroads into the tours and activities, and that it will erode the power of the online marketplaces. Consequently, it is critically important that Cabo Verde takes advantage of opportunities to promote local experiences with Google, which include:
- **DMO Partnership Program:** It is designed to enhance consumer-facing destination content in Google Maps, Street View, Destination Travel Guides, etc. Destination Management Organizations (DMOs) must apply to participate in the program. Once

accepted, the program provides DMOs free access to tools to improve the visibility of the destination and local businesses in Google content.[128]

- **MyBusiness Profile:** All local experience suppliers should obtain a free MyBusiness listing, which includes a supplier's description, contact information and website. A listing puts a supplier of local experiences in front of millions of users using Search, Maps or Voice.
- **Reserve with Google:** It is a new feature that suppliers can use to offer locals experiences of up to a day to Google users once they discover an experience using Search, Maps, or Voice.[129] Using Application Programmable Interfaces (APIs), experience suppliers can integrate their GoogleMyBusiness sites through Google's large and growing list of distribution partners, which includes online marketplaces such as TripAdvisorExperiences and GetYourGuide and software providers such as Rezdy and FareHarbour.[130] A 2018 Trekksoft survey of over 900 tour operators found that GoogleTrips, a trip planner and travel guide that has been replaced by Reserve with Google, had the second best return after Viator for driving business from OTAs. Seventeen percent of tour operators choose GoogleTrips while 40% choose Viator.[131]

  As noted in the case study section, Bermuda has achieved excellent results by participating in the Google DMO program, receiving 23 million views of its images and Street View contributions on Google in just over one year.

  The Faroe Islands provide an excellent example how of a little-known destination successfully used Google to market tourism. In 2016, an innovative mapping system was invented by a local resident and the "SheepView 360" campaign https://visitfaroeislands.com/sheepview360/ was launched by the Faroe Islands tourist board, where 360-degree cameras were strapped onto the backs of sheep and the images were uploaded Google Street View. In 2017, "Faroe Islands Translate" https://www.faroeislandstranslate.com/#!/ was launched, which has local volunteers provide translations of Faroese in Google Translate. These campaigns have attracted wide attention from consumers and international media and led to Google mapping the islands. Inbound visitor numbers and hotel nights have increased. In 2018, there were more than 110,000 visitors.[132]

TripAdvisor Review Site:
As the largest travel review site in the world, TripAdvisor has strong marketing influence. Opportunities for partnership with TripAdvisor include:

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[128] Google DMO Program. https://www.milespartnership.com/GoogleDMOProgram

[129] Reserve With Google gaining traction in tours and activities. Phocuswire. Apr 29, 2019. https://www.phocuswire.com/reserve-with-google-tours-and-activities

[130] Reserve with Google integrations – provides list of current distribution channel partners. https://www.google.com/maps/reserve/partners

[131] Travel Trends 2019. Trekksoft. 2019.

[132] How emerging destinations balance marketing and management. Phocuswire. Sep 30, 2019. https://www.phocuswire.com/destination-marketing-part-4-balance-management?oly_enc_id=8908A9469478I8S

- **Business Listings:** All suppliers that offer local experiences should obtain free business listings on the review site, which is linked to TripAdvisorExperiences, and gets millions of unique monthly users. TripAdvisor is willing to assist Cabo Verde with getting all the tourism suppliers listed on the review site at no cost.[133]
- **Destination Travel Feed:** Similar to Bermuda's example, Cabo Verde should obtain a social media-style travel feed that features curated information about Cabo Verdean local experiences. Cabo Verde can get travel feed pages for different countries and in different languages. Cabo Verde could feature different themes like food, music and adventure. This form of curated homepage on the site of a major online travel company is increasingly replacing the national destination marketing website because local entities cannot drive traffic as effectively as TripAdvisor or other large global platforms. Cabo Verde would have to pay for this program.[134]

Facebook:

- Facebook is most popular social networking site and an important review site. It has over two billion monthly active users and more than one billion that log on daily. The suppliers of local experiences can get free Facebook business pages. They can promote their local experience offerings by listing them under the Services section, which can be linked to the supplier's experience listings on the online marketplaces.[135]

9.4.2 Travel Trade Marketing

Tours & Activities Come of Age, by Phocuswright, reported that travel agencies/tour operators comprised about 25% about 20% of total tours and attractions sales in 2017, making them another important distribution channel for local experiences.

Tour operators and travel agencies located in Cape Verde can not only sell Cabo Verdean experiences but may assist with the development of experiences. For example, tour operators Nobai and Vista Verde have both worked with local communities and entrepreneurs to enhance or develop community tourism experiences. Tour operators and travel agents can be invited to test local experiences and provide input on how to improve them. Annex 10 has lists of tour operators and travel agencies with offices in Cabo Verde.

There are also hundreds of niche tour operators and travel agencies located in other countries. Partnership with the Adventure Travel Trade Association, which has over 1,000 members, has been effective in building experiential adventure travel in other destinations such as Jordan.[136]

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[133] In addition to the free TripAdvisor business listings, there should be a push to have all tourism suppliers to obtain their free business listings on GoogleMy Business, which is also important for driving business to tour and activity suppliers.

[134] The cost of a destination page depends on the number of users in a particular visitor origin country. The following would be the costs, subject to change, of pages for Cape Verde's top five 2018 visitor markets: UK - $22,072, Germany - $1,385, Netherlands - $890, Belgium - $792 and Portugal - $997. Content must be provided to Trip Advisor in the language of each of the countries.

[135] Statistics from https://newsroom.fb.com/company-info/

[136] Jordan has partnered with ATTA for more than a decade to build the adventure travel sector. See https://www.adventuretravelnews.com/an-idea-prospers-with-purpose-after-three-years-of-adventurenext-near-east-in-jordan and https://www.adventuretravelnews.com/research-near-east-firmly-plants-flag-on-adventure-travel-map-after-adventurenext-near-east-event.

Cabo Verde should become a member of ATTA to reach niche tours operators and travel agents as well as important travel media and influencers.

9.5 Supporting the Development of Local Experiences

The final question to be answered is: How can the development of local experiences by Cabo Verdeans be fostered?

There are two ways that the government of Cabo Verde can foster the development of local experiences:

1) By collaborating with professional tour operators that can meet the requirements of all of the marketplaces, including the licensing rules that most marketplaces have in place.
2) By collaborating with non-professional experience suppliers (entrepreneurs and MSEs with little or no tourism experience) to develop local experiences that can be sold on AirbnbExperiences.

Working with professional operators would allow Cabo Verde to develop a portfolio of local experiences more easily and quickly. However, Cabo Verde and the World Bank's aim is to help non-professional experience suppliers enter the tourism chain so supporting this group is very important.

The priority is to have unique local experiences that are market ready, which means that the quality and consistency of the experience is of a high standard. A market ready approach, which was developed in Canada, has been instrumental to the growth of indigenous tourism in that country. The model has been adapted by other countries and has contributed to the success of community tourism development initiatives in several emerging tourism destinations including Guyana, Jamaica and Chihuahua state in Mexico.[137]

An experience development program is needed to support both non-professional and professional experience suppliers to achieve market-readiness. The Bermuda Product & Experiences Division and the Airbnb Africa Academy program in South Africa provide examples of innovation that can be adapted for Cabo Verde. The role of the development program would be to collaborate with and support professional and non-professional experience suppliers to develop high-quality local experiences, create marketing assets and promote the experiences.

The experience development program should provide training, coaching and support to suppliers in the following key areas:

- ICT basics like how to use the Internet, email, computers and simple word processing and spreadsheet programs.
- Entrepreneurship, business operations, and financial management.
- Market research about trends, visitors and their expectations, etc.

137 Raising Indigenous & Community Tourism: Building economy in emerging destinations using the Indigenous market ready approach. Presentation at UNWTO, Government of Jamaica and World Bank Group Global Conference on Jobs and Inclusive Growth: Partnership for Sustainable Tourism. Montego Bay, Jamaica, November 2017.https://know.unwto.org/sites/all/files/pdf/day_1_s2_judy_karwacki_0.pdf

- How to design high-quality immersive local experiences, including concept development and itinerary design.
- How to price experiences.
- Guest hospitality and customer care skills.
- Creating marketing assets for promoting experiences (descriptions, images, videos).
- Different online marketplaces and how to work with them.
- Search and review marketing (TripAdvisor, GoogleMyBusiness).
- Social media marketing (Facebook, Instagram, etc.).

The government of Cape Verde should establish partnerships with major online marketplaces and travel companies -- like AirbnbExperiences, Google, and TripAdvisor (review and Experiences divisions) -- to support these training activities and the marketing of local experiences.

10 Recommendations

The research and analysis conducted for this study provide insight into what is needed to support local entrepreneurs and MSEs to develop local experiences and market them on the online marketplaces. Together with insight gained through the lead consultant's past work in other countries, they ground the following recommended actions for consideration by Cabo Verde's government and tourism sector.

Table 27 Recommendations

Need/Current Situation	Action Step Recommendations
ENABLING ENVIRONMENT	
The following are key actions to help establish an enabling environment and national framework that facilitates and accelerates Cabo Verde's success in local experiences development and online marketing.	
UMA FAMÍLIA, UM TURISTA: Locally-hosted experience development and marketing seems to fit perfectly with this program.	The government conducts a review of this study in order: • To consider how the study findings influence the *Uma Família* program and whether helping select rural communities to create local experiences and use online marketplaces should be a priority. • If priority is given, to consider the recommendations provided in this section and how to integrate them into *Uma Família*. Santo Antão and Santiago should be the priority islands.
LICENSING/REGULATION OF SUPPLIERS: One of the most significant barriers faced by local hosts is to meet government regulations, developed for professional operators.	Many tourism DMOs recognize that licensing schemes must be modernized to accommodate the new classes of accommodation and experience suppliers born by the sharing economy and online platforms. Cabo Verde can be a policy leader in Africa and beyond by: • As part of the consolidated Tourism Code, creating standards and licensing for local experiences that ensure that safety and quality standards are in place while accommodating the unique nature and circumstances of local hosts. • A separate type of license should be developed for experiences such as those listed in Section 8.2.1, where the local person is acting as a type of ambassador taking visitors to people and places around the community. • Two levels of guide license could be developed: i) A local site guide license, where community persons receive basic guide training and safety training which allows them to host local experiences in and around their urban neighborhood or rural community only. ii) A professional tour guide license, where persons receive comprehensive tour guide training and can guide anywhere in Cabo Verde. • Community-appropriate standards for experiences involving food preparation or accommodation can be developed by adapting standards created to accommodate CBT development in other countries (e.g., standards developed by the Association of South-East Asian Nations (ASEAN) and by the Thailand Community-Based Tourism Institute (CBT-I)).[138] • AirbnbExperiences has a strong interest in developing community-appropriate standards for local experiences and would likely be willing to collaborate with Cabo Verde to develop these standards.

138 The standards can be found at the following sites: ASEAN https://www.asean.org/wp-content/uploads/2012/05/ASEAN-Community-Based-Tourism-Standard.pdf and Thailand https://www.cbt-i.org/wp-content/uploads/CBTStandardHandbook_Eng.pdf

Need/Current Situation	Action Step Recommendations
RESEARCH PROGRAM: The research contained in this scoping study note is a useful start. A commitment to conducting industry research has underpinned success in experience-focused destination marketing in Bermuda and Canada's indigenous tourism sector.	The experiences sector is competitive, so Cabo Verde needs a multifaceted market-responsive research program to stay ahead. The industry research program should include: • Quantitative and qualitative research to gain a better understanding of visitors interested in local experiences travel. A key goal is to develop an ideal guest profile of this traveler – What specific experiences are of the most interest? In what style, format or nature of delivery? When do they come? Where do they stay? With whom do they travel? What do they do when they travel? What are their habits? How can they be reached with promotional messages? (Annex 11 provides a template and an example persona.) • Research methods should include analysis of data from partnerships with online travel companies (i.e., recommended TripAdvisor destination travel feed page, Google DMO program), the DMO website www.capeverde.com, questions on INE's annual visitor satisfaction surveys and visitor intercept surveys. • Cabo Verde could use a tool such as the Tourism Sentiment Index (discussed in Section 4.1) to help to gain insight on consumer awareness of and attitudes to Cabo Verde experience offerings.[139] • On the supply side, prepare a full inventory of Cabo Verdean experiences. The first step can be to compile an inventory of existing tourism suppliers with TripAdvisor (as discussed in Section 8.3.2.). • On an on-going basis, gather data to understand which experiences sell best and achieve the best economic and other community benefits. Such data would provide insight into how to enhance existing experiences or design new ones that respond to market preferences.
EXPERIENCE DEVELOPMENT PROGRAM: A common trait of DMOs that are successfully using experience-driven destination marketing is that they provide ongoing technical and financial support for experience development.	It is critical to establish an experience development program within the DMO. As described in Section 8.5, the role of the program would be to provide on-going capacity building and technical support to the suppliers of experiences. The program could be established on a project basis initially but should eventually become a permanent function of the Cabo Verde DMO. Actions to be taken to this end include: • Develop agreements with key partners to obtain training materials and support for the program (AirbnbExperiences, Google, TripAdvisor Review and Experiences divisions). • Explore ways to establish an annual grant program to provide financial assistance for the development or enhancement of authentic Cabo Verdean experiences. Perhaps PROEMPRESA could establish a program. The existence of such a program will generate excitement and creativity among local hosts and ensure experiences are enhanced and new ones created, both of which are critical to respond to new experience trends and draw repeat visitors.

[139] See https://destinationthink.com/about-tsi/.

Need/Current Situation	Action Step Recommendations
	• Approach the TUI Care Foundation and the Travel Foundation and request support for the program. They have previously had initiatives in Sal and Boa Vista aimed at diversifying tour excursion choices and increasing economic benefits for local people.[140] They also have assisted community-tourism entities in Jamaica like Rastafari Indigenous Village to become market ready and capable of serving the demanding all-inclusive and cruise markets.[141] Their partnership would assist with marketing local experiences to the all-inclusive and cruise markets too.
ICT Access and Skills: Suppliers of experiences may face difficulties in accessing the internet and may lack the ICT skills needed to market through the online marketplaces.	To work with online marketplaces, suppliers of local experiences must have reliable and affordable access to the Internet, and they must have the ICT skills to use online platforms. Actions that the government should take to address these needs include: • Provide training in basic ICT skill areas – how to use the Internet, email, computers and simple word processing and spreadsheet programs. • Investigate the potential to obtain training and mentorship for suppliers from students in ICT training programs at educational institutions. • Identify ways experience suppliers might be able to obtain access to reliable and affordable Internet service and the use of a computer or smartphone for business purposes. For example, can arrangements be made for experience suppliers to use the wi-fi and equipment of community organizations or business associations, whether on a cost-for-service or free basis?
Financial Services: Suppliers of experiences must be able to access financial services, including electronic payment options, to sell through the online marketplaces.	The ability to have a bank account and receive electronic payments is fundamental to conducting commerce online. The study did not investigate the options available to experience suppliers, so the situation in Cabo Verde is unknown. As one of the first steps, research must be conducted to determine whether local suppliers can access financial services and what financial services gaps and challenges might prevent suppliers from participating in the online marketplaces.
AIRBNBEXPERIENCES PROGRAM ACTIONS	
AirbnbExperiences is the only marketplace that works with non-professional experience suppliers. It is a key partner for creating opportunities for the former to enter the tourism value chain. The following recommendations intend to assist with establishing a partnership and rolling out an AirbnbExperiences pilot program, modelled on the Airbnb Africa Academy but adjusted to meet Cabo Verde's needs.	

[140] Case Study: Rastafari Indigenous Village. Travel Foundation. No date. https://www.thetravelfoundation.org.uk/project/better-excursions/

[141] Better Excursions. Travel Foundation. No date. https://www.thetravelfoundation.org.uk/casestudy/rastafari-indigenous-village/

Need/Current Situation	Action Step Recommendations
AIRBNBEXPERIENCES DESTINATION PARTNERSHIP: Discussions with AirbnbExperiences indicate they would be willing to open in Cabo Verde if approached by government. The Airbnb Africa Academy presents possible special opportunities.	To establish a partnership, Cabo Verde should: • Prepare a proposal that describes the findings of this scoping study, the proposed AirbnbExperiences program and the framework elements outlined above. • Request that Cabo Verde be considered as a partner destination for AAA. In 2019, there will be additional pilots in Africa, and in 2020 the focus will be on refinement and scaling. • Adopt the AAA training model, even if Cabo Verde cannot be a partner destination for AAA. • Explore the potential for a tax and marketing agreement, similar to Bermuda, where Airbnb collects taxes from homes guests and remits them to the government for promoting Experiences on the platform, including the launch of AirbnbExperiences and joint marketing initiatives.
KICK START PROGRAM: To quickly establish a profile on Experiences and improve the online presence, Cabo Verde should begin with existing experiences.	As a first step, Cabo Verde should work with AirbnbExperiences to get existing experiences listed: • Arrange to have meetup sessions between AirbnbExperiences and tour operators and other suppliers that have existing experiences or that can more easily create experiences suitable for AirbnbExperiences. • Through these sessions, which can take place in-person or by webinar, suppliers can learn how to use the platform, and how to adapt their products for AirbnbExperiences. • Translation of AirbnbExperiences training materials into Portuguese may be required.
CROSS SELLING TO HOMES: Cabo Verde has a good supply of Airbnb's Homes and persons using them are interested in local experiences.	Another first step, which will help support the Kick Start Experiences action, is to explore ways Cabo Verde can make Homes guests aware of experiences on offer. For example: • Most Homes hosts provide information about what there is to do in the area, so marketing collateral should be provided to them that drives customers to the Cabo Verde Experiences page • Possibly contests could be held for Homes customers, or they could be invited to write blogs or submit photos for use on Cabo Verde's destination website.
PILOT LOCATIONS: The study provides insight into the locations that should be considered for the pilot AirbnbExperiences programs.	The recommended priority locations for the development of local experiences are: • Sal: the large volumes of visitors make Sal important. It should be one of the first pilot locations. There are some good opportunities around food and music, such as Social Dining and beach BBQs or fish frys. Boa Vista probably has similar opportunities. • Mindelo: as the cultural capital of Cabo Verde, it already has a complementary brand and excellent resources. It should also be one of the first pilot locations. Here, the main opportunities are music, food, shopping and active exploration of the city experiences for the cruise and adventure travel visitor markets. • Santo Antão: As the hiking mecca of Cabo Verde, it also has a strong complementary brand and resource assets. The main opportunity is akin to the Abraham Path or Jordan Trail projects, supporting the development of local experiences along the hiking trails for the adventure travel visitor market.

Need/Current Situation	Action Step Recommendations
	Within the priority locations, selection criteria for a partner community should be: • Has high tourism potential (existing visitors, reasons to visit, distinct and unique neighborhoods, where visitors can learn about the culture). • Is seen to be relatively safe and welcoming to tourists. • Has strong and reliable cell phone reception or signal. • Is supportive of tourism development.
COMMUNITY PARTNERSHIPS: In South Africa, community partners are important to the success of local hosts and experiences.	In the pilot communities, community partners that can provide capacity building and other support to local hosts should be identified: • The ideal partners would have tourism, entrepreneurship and business, and ICT expertise. • Ideally, they could provide access to reliable and affordable Internet service and the use of a computer or smartphone for local hosts that need such support. • For example, the Local Networks for Sustainable and Inclusive Tourism in Santo Antão (ROOTS or RAIZES), which is promoting sustainable tourism development would be a possible partner for Santo Antão.
LOCAL HOSTS: A key ingredient of local experiences is the passionate, knowledgeable and capable local host.	Identification of appropriate local hosts has been critical for Bermuda and South Africa, the case study countries. Cape Verde's selection criteria for local hosts should include the following criteria: • They are entrepreneurs or MSEs that have a special local experience or skill to share with visitors to Cape Verde. Or, they are not-for-profit organizations that have a social impact experience to share. • They have the key skills and assets needed to operate an online business: digital literacy; business experience or an entrepreneurial mindset; good communication skills; a smartphone with WIFI access; an online bank account, and; an email address.
TECHNICAL TRAINING: Local hosts will need training in order to market their local experiences.	Local hosts will need training to successfully present and manage their local experiences on the AirbnbExperiences platform: • Discussions with representatives of AirbnbExperiences confirm the Africa Academy program materials, and other training materials Airbnb has developed could be used to support the development of local experiences in Cabo Verde.
PUTTING CABO VERDE ON THE DIGITAL MAP	
PUTTING CABO VERDE ON THE DIGITAL MAP: A first step to establishing a strong online presence for Cabo Verdean experiences is to take advantage of the marketing	A priority for Cabo Verde is to take advantage of the marketing opportunities from these three dominant online companies that can be used to promote local experiences. First, there are DMO level actions that should be taken: • Google DMO Partnership program – Cabo Verde should apply to participate in the program so as to improve Cabo Verde's presence on the Internet by taking advantage of Google's reach.

Need/Current Situation	Action Step Recommendations
opportunities available from Google, Facebook and TripAdvisor.	• TripAdvisor Destination Travel Feed Page – Cabo Verde should take control of managing this page, and use it to curate collections of experiences and otherwise promote them. There is a cost for the program. On a supplier level, the following opportunities should be taken advantage of: • GoogleMyBusiness – Suppliers can manage their online presence across Google, including Search and Maps. Also, they can promote the experience and make it easier for people to find. • TripAdvisor – Suppliers can get free business listings to take advantage of the power of traveler reviews for selling experiences (Phocuswright survey says they are important for 57% of businesses). • Facebook – Suppliers can get free business page where they can promote local experiences by listing them under the Services section, where links to listings on marketplaces can be given.
OTHER ONLINE MARKETPLACES	
WORKING WITH OTHER ONLINE MARKETPLACES: While AirbnbExperiences is an excellent partner for creating and selling local experiences, the scoping study concludes there are several other good partners.	The following are other marketplaces on which Cabo Verdean experiences should be listed. They have more stringent listing requirements, including requiring proof of public liability insurance, so they are generally appropriate only for well-established local hosts and tour operators. Cabo Verdean experience suppliers will need additional training to work with these companies. • TripAdvisorExperiences (Viator) – It is the largest marketplace. It emphasizes small group local experiences. • GetYourGuide – Dominant in Europe and planning a massive expansion of GetYourGuide Originals" branded tours, which are developed in partnership with tour operators. • ExpediaLocalExperts – Its large size and market reach make it important and it is likely to be more important in the future. • ToursByLocals – While only a small P2P platform, it is appropriate for local guides and useful for reaching the North American market. • BookingExperiences – It could become among the largest and most important marketplace within a short time.
TECHNICAL TRAINING: Local hosts will need training in how to market their local experiences.	Local hosts will need training to successfully present and manage their local experiences on these other major online marketplaces. As with AirbnbExeriences, the marketplaces have online support services and training materials available.

Need/Current Situation	Action Step Recommendations
EXPERIENCE-DRIVEN DESTINATION MARKETING	
OTHER MARKETING: Ideally, Cabo Verde should adopt an experience-driven management and marketing strategy, similar to Bermuda.	The Bermuda case study shows success can be achieved by tapping into developing rich local experiences and driving demand for the experiences using digital marketing, analytics, and partnerships with the travel trade and online platforms like Google, TripAdvisor, Airbnb, Facebook and Expedia. Cabo Verde should take a similar experience-driven destination management and marketing approach. Actions that make sense for Cabo Verde include: • Featuring and actively promoting Cabo Verdean experiences in all aspects of destination marketing, especially digital marketing. • Developing a Cape Verdean local experiences brand. • Having workshops, newsletters and incubator programs for entrepreneurs and tourism businesses to help them understand experience-driven product development and digital marketing, and including engaging key partners such as Airbnb, Google, TripAdvisor and Expedia to assist with these. • A media program is critical to raise awareness of and interest in Cabo Verde as an experiential travel destination. National Geographic Traveler, Wanderlust and WideOyster are some publications that are good for Europe. Familiarizations trips should be arranged for writers from these magazines and select bloggers, Instagrammers, influencers, etc. • Instagram is transforming how people choose destinations, so having an experience-driven Instagram campaign gives Cabo Verde a chance to get on people's radar. (A 2017 Facebook podcast said 67% of travel enthusiasts on Instagram use it to get ideas for new places to travel to). • Attending travel trade shows that are attended by specialist travel tours operators and media (especially shows such as the annual Adventure World Travel Summit and responsible/specialty travel shows in the major origin market countries, like Vakantiebeurs and Amsterdam Fair for Special Journeys in The Netherlands). • Working with cruise companies and tour operators to create new experiences. • Working with 238cv.com once this local online marketplace launches.[142] • Featuring bookable experiences in brochures distributed to Visitor Information centers, hotels, etc. (NOTE: A recent study found brochures are the #1 influencer of tourists & visitors once they are in a destination.[143]

142 www.238cv.com is a digital start-up platform for discovering Cabo Verde tourism that is being developed by Ihaba, which was founded in 2012 with the objective of building enterprises and nurturing innovation in Africa. 238CV consists of a web portal and a mobile application. Once it goes live, it will allow users to book accommodation, activities, guided tours, events and car rentals all in one place. Ihaba, the firm that developed www.238cv.com, is currently seeking investors for the platform.

143 Brochures Are the #1 Influe ncer of Tourists & Visitors While In-Market. Newswire. Jan 22, 2019. https://www.newswire.com/news/new-study-confirms-brochures-are-the-1-influencer-of-tourists-visitors-20775348

Annex 1: AirbnbExperiences

This annex provides further details on AirbnbExperiences. It includes: a summary profile that builds on the information provided in Section 3.4.1.; information on host licensing guidelines (which Airbnb calls 'Responsible Hosting), and; information on how destination partnership with Airbnb work.

Airbnb Experiences Profile		
Market Share	**Website Traffic***	**Comments**
Started with 500 experiences in November 2016. At start of 2018, had 5,000 experiences in 60 cities. Grew 285% to 30,000 experiences in early 2019. 4,400 listings in Skift's State of Tours & Activities 2018 top 100 destinations (6% of total).	66-84 million visitors/ month for Airbnb.com: 53% US, 2.4% UK, 1.9% France, 1.8% Germany, 1.7% Mexico. 72 million additional per month from regional sites in UK, France, Germany, Italy, Canada, Russia.	Launched Nov 2016. Single day tours. Preparing to reintroduce multi-day tours. People-centered, local, immersive tours and shorter experiences. Non-traditional tourism entrepreneurs. In 2018, launched Airbnb Concerts – max 50 pax; Airbnb Passion - Social Impact (nonprofit, no fees), Social Dining (food), Adventures. In 2019, introduced category leads to build inventory in key themes including Food and Drink, Entertainment, Animals Has a Community Tourism development program for Europe www.airbnbcitizen.com/community-tourism-programme-criteria Has AfricaAcademy program, piloted in South Africa and Kenya and being spread to rest of continent. Has developed Experience partnerships with several other destinations including Bermuda, Jamaica and Puerto Rico. Benefits from being part of Airbnb, which is in 191 countries and 8,100 cities.

* Collected from www.similarweb.com April 2019. Traffic is for preceding 6 months.

Airbnb Experiences: Hosting Policies			
Commission Rates	**Insurance Policies**	**Legal Requirements**	**Other Requirements**
20% commission 0% for Social Impact Experiences	Provide experience protection insurance which provides hosts with primary coverage against liability claims of up to $1 million	Suppliers must meet all legal requirements to give experiences in their area. Self-verification is required when listing an experience.	**Accuracy:** Hosts must provide complete info about experience. **Exclusive dates:** Only Airbnb guests can attend time & day sold on site. **Reservations:** Hosts must honour all bookings, even for one person. **Ratings:** If many low-star reviews may be removed.

Host Licensing Guidelines

Airbnb provides general information pages about Responsible Hosting for Experiences and the different general and experience-specific licensing requirements, business rules and taxes that may apply. The pages cover a variety of experience types, including those involving alcohol, food, tour guiding, transportation and music. Also, there is information on operating experiences on public lands and about business licenses and taxation. The pages are intended to give Experiences hosts an idea of the types of rules that may apply to them.

For some destinations with which it has agreements, Airbnb provides information pages specific to that country. These pages provide detail on how different destinations regulation locally-hosted experiences. The chart below compares the information provided for two destinations with which AirbnbExperiences has destination partnerships, Jamaica and South Africa (Cape Town). The chart shows that Experiences are quite highly regulated and typically must meet regulations around tour guiding, serving food, serving alcohol and providing transportation. Generally, licenses and permits are required unless guests are not charged for these services. If a licensed 3rd party supplier is used, such services can be included in an Experience. Also, that hosts may have to pay VAT and income tax.

Responsible Hosting Guidelines: South Africa and Jamaica		
Category	**South Africa (Cape Town)**	**Jamaica**
Business Licensing	Likely to be considered to be operating a business if you regularly provide goods or services in return for money. If you just provide a Trip or experience as a once-off or irregularly, you are unlikely to be considered to be operating a business. A "general" business licence is not required to business in S Africa, however activity-specific licenses may be required.	No general business license required if services are provided by individuals without a physical venue. There are the general permits required for company incorporation if services are provided by a company and a general business license is required if a physical venue.
Guiding Tours	The definition of "Tourist Guide" under the Tourism Act 3 of 2014 (the Tourism Act) is wide. If you accompany and commentary and information to paying guests in South Africa, you are acting as a Tourist Guide. Must register as a Tourist Guide and obtain a registration certificate.	Need a tourist guide permit to provide guided tours. No permit likely needed if you use licenced 3rd party guides. No permit if tour is not the main part of the experience, is given free of charge and description of the Experience does not entail a tour accompanied by a certified/ knowledgeable guide, but rather includes "sightseeing" of facilities and/or city areas within the broader experience.
Experiences Involving Food	The Regulations Governing General Hygiene Requirements for Food Premises And the Transport of Food 2012 apply including when meals are cooked and served in own home, at local place such as a community center, or prepared for a picnic. No certificate required if take guests to a local restaurant or festival, however, that business must have certificate.	Food Handlers Permit needed to use your residential kitchen to prepare meals that you can sell to your Guests. Permits require compliance with zoning and food safety regulations. No permit needed to take guests to a local restaurant, serve them food cooked by a licenced facility or caterer, or give them cooking instructions.
Experiences Involving Alcohol	A person may not micro-manufacture or sell liquor unless they have a liquor licence, only in authorized premises, and at authorized times. Likely applies even only host evening drinks or drink making class at your home. Probably does not apply if guests bring their own alcohol, or if take them to licenced local bars.	To sell, distribute and/or serve alcohol to your guests at home, at a private venue or outdoors you need a liquor license under Jamaica law. Selling to guests includes per drink charge or inclusion in experience price. Serving, but not selling, alcohol occasionally to guests from your private stock or home brewed stock is allowed if under 225 liters within a month.

Responsible Hosting Guidelines: South Africa and Jamaica		
Category	**South Africa (Cape Town)**	**Jamaica**
Experiences Involving Transportation	No information	You don't need a special license or permit to drive your guests if are not charging them. You can use licensed 3rd party services and include in price. If you drive, cannot charge them either directly or in experience price. Should say transportation is provided "at no charge". Driving cannot be main theme.
Taxes to be Paid	In general, hosts who are in business need to register for, charge and file Value Added Tax (VAT) on the price of their Experience. Hosts may have to pay income taxes	Hosts likely need to be registered before the Tax Authority and to collect and pay applicable taxes.

Sources: https://www.airbnb.ca/help/topic/1204/jamaica and https://www.airbnb.ca/help/topic/931/south-africa

Destination Partnerships

AirbnbExperiences works only the Ministry of Tourism and national DMO in any destination as their first points of contact. First, they want to understand the national vision for tourism and how experiences fit in, such as whether there are particular theme areas (e.g., food, culture, agriculture). They may also look at regions and cities for strengths in specific areas. As part of opening a new destination, Airbnb and the country agree on a set of KPIs so they can judge success and learn together

There are three main ways Experiences brings on a new destination:

1. Many entrepreneurs independently submit experiences to the Experiences platform even though it's not yet open yet in that country. AirbnbExperiences sees there is high interest and a backlog of suppliers that are not approved, so they will assess against their internal criteria and decide whether to open the country.
2. A DMO or other government partners sends a submission of interest. After evaluation and approval, AirbnbExperiences and country launch Experiences in partnership. Typically, the DMO or other country partner assists with providing links to experience suppliers and helping them to get onboarded.
3. A co-launch may occur around a particular event or social cause. These are rare, perhaps one or two of these a year. An example is Puerto Rico, where a partnership to help rebuild was introduced in 2018, after the devasting Hurricane Maria.

Both of the latter options could include shared marketing, such as joint press releases and social marketing initiatives. Criteria that AirbnbExperiences looks for when opening a new destination are (usually one initial call with a destination):

- There is a DMO or other appropriate and enthusiastic partner that wants to work with AirbnbExperiences. The partner can articulate the strategic experience-related goals and the priority experience themes for the destination, and that those align

AirbnbExperiences's priorities (i.e. food & drink, adventure, culture, music, entertainment).

- The partner can bring contacts or help identify experience hosts that meet the AirbnbExperiences criteria, namely, that they: have expertise in their experience topic, have access to the places and things to be included in the experience, and are compliant with local licensing regulations. Airbnb looks for the experience to have a sense of community, and for engagement with the community if the experience is taking place within one.
- A minimum of 15 to 20 such experiences can be brought onto the platform for the launch.

Annex 2: P2P and OTA Marketplaces

This annex provides further details on the P2P and OTA marketplaces, building on the information provided in Sections 3.4 and 3.5.

P2P Marketplaces: Profiles			
Name	**Market Share**	**Website Traffic***	**Comments**
Get Your Guide GetYourGuide.com	36,000 activities, 140 countries. 4,400 listings in Skift's 2018 top 100 destinations (20% of total).	GetYourGuide.com gets 4.5 to 6.4 million visitors/ month: 22% US, 7% UK, 4% India, 4% Germany, 4% Canada. 20 million unique visitors monthly from all sites	Founded in 2008. 2nd largest in tours and activities marketplace; largest P2P. Privately owned. German Headquarters. Single and multi-day tours. Curates products. Raised $700 million in funding; $484 million in May 2018. Between June 2018 and March 2019, GetYourGuide sold 10 million tours. In decade before, sold only 15 million total. Began selling own "Get Your Guide Originals" in 5 European cities in 2018. Developed with tour operator partners. New capital funding being used to develop and market branded tours.
Tours by Locals ToursbyLocals.com	10,000 experiences, 2700 private tour guides In 159 countries	350,000 to 590,00 visitors/ month: 32% US, 5% Georgia, 5% UK, 4% Canada.	Founded in 2008. Sell mostly single day tours. Have some multi-day ones. People can plan customized multi-day tours working with a local guide. Privately owned. Vancouver Headquarters. Serves 400,000+ clients a year
WithLocals WithLocals.com	Over 2,000 unique experiences, over 1,000 local hosts. In 88 destinations.	210,000 to 329,000 million visitors/month: 17% Netherlands, 14% US, 12% UK, 6% Germany, 4% Italy	Founded in 2013, in the Netherlands. Peer-to-peer model. Focus on food and experiences.

* Collected from www.similarweb.com April 2019. Traffic is for last 6 months.

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P2P Marketplaces: Listing Policies				
Name	**Commission Rates**	**Insurance Policies**	**Regulatory**	**Other Info**
Get Your Guide GetYourGuide.com	20-30%	Requires suppliers to provide insurance coverage to customers and require proof of insurance.	Suppliers must meet all legal requirements to give tours in their area	Supplier must agree to follow its best practices regarding meeting points, check-in processes, starting times, duration, and other factors.
Tours by Locals ToursbyLocals.com	A minimum of 2.5% Commission. Average affiliate commission of US$12.90 per sale.	No information	Suppliers must meet all legal requirements to give tours in their area	Rigourous initial and ongoing screening of Guides.
WithLocals WithLocals.com	20%	No information	Suppliers must meet all legal requirements to give tours in their area	--

© Compiled by Judy Karwacki/SmallPlanet.Travel and LeManoDelMono

OTAs: Profiles			
Name	**Market Share**	**Website Traffic***	**Comments**
Viator (Trip Advisor) Viator.com	In 2,400 destinations 202,000 listings Listings doubled from in 2 yrs between early 2016 and early 2018 to 100,00 and then doubled again by early 2019 38,000 listings in Skift's 2018 top 100 destinations (55% of total).	7.2-11.2 million visitors/ month: 41% US, 7% UK, 5% Canada, 4% Australia, 3% France. TripAdvisor sites receive 145 million visitors/month. 60% US, 4% Poland, 4% Thailand, 2% UK, 2% Germany. 490 million unique visitors across its domains that it can cross-sell to.	Founded in 1995, in San Francisco Purchased by Trip Advisor in 2015. Largest tour & activities marketplace. Single and multi-day tours. Recently rebranded to TripAdvisor Experiences, although Viator still used for tour sales. Has a white-label branded tour platform. Has a travel agent platform. Connects to TripAdvisor profile, making booking easy. TripAdvisor drives traffic and accounts for about 16% of Viator's referrals. In 2018, TripAdvisor purchased Bokun, a leading online booking management software. In 2018, non-hotel revenues for 2018 grew 27%, to $485 million
Booking Experiences Booking.com	Newly entering market	No data for experiences Booking.com: 362.5 million to 427.2 million visitors per month: Russia, US,	Booking.com founded in 1996. Amsterdam based. Largest online travel company in the world. Now entering tours and activities market. Began by offering to customers who purchased hotel. Personalized landing page sent to them by email. Started with select major European and Asian cities. In 2018, started expansion to high profile US cities. In 2018, purchased FareHarbour, a leading online booking management software company In early 2019, began working with rival software provider, Rezdy. Expected to announce stand-alone tours in 10 European and Middle Eastern cities. Supports sustainable tourism development with Booking Booster and Booking Cares programs.
TouringBird TouringBird.com	25,000 activities in 20 cities. 400 contributors. Around 400 local contributors	120,000 to 320,00 visitors/ month: 17% US, 10% India, 8% Canada, 4% Bermuda, 4% Italy.	Launched in Sept 2018. Google owned. An Area 120 initiative, Google's incubator for experimental projects. Part OTA and part insider guide. Started with 20 cities. In April 2019, announced adding 200 destinations worldwide and 75,000 experiences. Has a "build-your-own package" feature for top attractions, so travelers can book different tours across multiple providers
Expedia Local Expert ExpediaLocalExpert.com	36,000 experiences in 2,000 destinations, in 159 countries. 4,500+ activity partners, 400 concierges. 14,000 listings in Skift's 2018 top 100 destinations (12% of total).	54-62 million visitors/ month: 80% US, 1% Canada, 1% UK, 1% Mexico.	Launched in 2015, but started in 2012. Single day tours. Sold US$500 Million+ in 2017. In some places, such as Hawaii, have kiosks and concierge stands in hotels and retail locations where Expedia Local Expert staff sell tours and activities. Connects to Expedia Group, second largest travel company in world, which sold $10 billion in 2017. Expedia has been investing in Local Expert.
Musement Musement.com	25,000 experiences, in 1,000 destinations	570,000-942,000 visitors/ month: 33% Italian, 13% French, 9% Spain, 7% US, 6% Germany.	Launched in 2006. TUI group purchased in 2018. Single and multi-day tours. Italy based, originally European focused but now expanding. 8 languages. Different from others because also highlights temporary events and even free activities. Also, focuses on giving local tips. In 2017, bought Triposo, which has 12 million users

* Collected from www.similarweb.com April 2019. Traffic is for last 6 months.

OTAs: Listing Policies			
Name	**Commission Rates**	**Insurance Policies**	**Regulatory**
Viator (Trip Advisor) Viator.com	Negotiable. Typically 20%	Requires suppliers to provide insurance coverage to customers and require proof of insurance.	Suppliers must meet all legal requirements to give tours in their area
Booking Experiences Booking.com	20-40%	No information	No information
TouringBird TouringBird.com	No information	No information	No information
Expedia Local Expert ExpediaLocalExpert.com	20-40%	Requires suppliers to provide insurance coverage to customers and require proof of insurance.	Suppliers must meet all legal requirements to give tours in their area
Musement Musement.com	15-25%	No information	No information

Annex 3: Bermuda Case Study

This annex provides more information on how Bermuda's approach to developing and marketing 'home-grown experiences'. It builds on the information provided in Section 4.1.

Background

- First national tourism plan in 2012 was developed to revive tourism after years of stagnation. A key plank of the plan was to develop memorable local experiences to give visitors a sense of place and a taste of real life in Bermuda. The tactics were to build pride, create awareness, provide skills and training, and develop business incubators.
- In 2014, the Bermuda Tourism Authority BTA, an independent, non-government entity was formed. It included a "Product and Experience" division, led by a Chief Product and Experience Development Officer.
- In 2015, began initiatives and campaigns focussed on “our friends the Bermudians” as an integral part of the tourism product.
- New tourism master plan of 2018 has seven pillars, one of which is to maintain local involvement and tap the entrepreneurial potential of local people to help them connect and engage with visitors. Another is to reduce seasonality and make Bermuda more a year-round destination. Experiences and digital marketing are both critical to meeting these objectives.

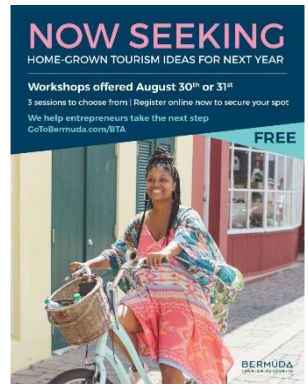
Product and Experience Division

- The core focus is investment in experiences development, with a particular focus on developing experiences that help reduce seasonality.
- Between 2014 and 2019 invested $3.1 million in development of over 260 ideas to help enhance Bermuda's collection of visitor experiences.
- Holds many workshops on to bring entrepreneurs and tourism businesses into the experiential segment. Information on visitor markets, on creating and marketing experiences, and specific topics such as sports and culture. The goal is to build awareness and so Bermudians better understand what today's visitors want.
- Keeps suppliers informed about trends, provide education and information using social media pages and newsletters targeted to suppliers.
- Has an Assistant Experience Manager that works with experience suppliers.
- Has entrepreneur start-up programs.
- Focus on using the creativity of local people to package and repackage experiences and generate revenue in new ways. For example, create special experiences around cultural traditions, such as festivals and events. A behind-the-scenes VIP experience created around their Peppercorn Ceremony has become a popular sell-out annual experience as has a win-a-ride on a float at Bermuda Day experience.
- Works with cruise companies and tour operators to create experiences. For example, worked with local entrepreneurs and Disney Port Adventures to create over 40 new or enhanced Bermuda experiences.
- Airbnb, Trip Advisor and Google provide training sessions for suppliers at their annual summit every October. They give other training sessions throughout the year, often by

webinar. Some sessions offered in beginner, intermediate and advanced levels so suppliers can get education according to their needs.

- Experience Investment Programme, created in 2017, invests in developing home-grown ideas by helping entrepreneurs who need assistance getting their idea off the ground or who need help fostering growth for their existing idea. The focus is on the niches of Arts & Culture and Sports. There have been three rounds of funding.

Bermuda Experiences Investment Programme: 2017-2019			
	2017	2018	2019
Total Funding		$ 838,000	$ 685,000
Applications Received	61	71	52
Approved Applications	40	55	25
Average of Total Funds Given	$ 20,213	$ 15,236	$ 27,400
Arts & Culture Funding		$ 232,000	$ 372,000
Approved Applications	27	21	13
Average Given	$ 16,945	$ 10,545	$ 31,000
Sports Funding		$ 606,000	$ 303,000
Approved Applications	13	35	13
Average Given	$ 22,846	$ 17,824	$ 23,308



- Other sample initiatives of the P&E Division are the Entertainment Working Group, which put on a local talent showcase and live local entertainment at pop-up locations, and #BDA365, which helped experience suppliers tell their story online, particularly on social media.

Marketing

- The strategy is to drive tourism demand using digital marketing, analytics, and partnerships with airlines and online platforms like Google, TripAdvisor, Airbnb, Facebook and Expedia.
- Have a lot of data that shows visitors do a lot of online research before visiting.
- Actively promote and market experiences online in various ways.
- Feature bookable experiences on the destination website.
- Manage Trip Advisor page to complement overall content strategy and include themed experience collections. When they set up new experience suppliers, ensure they get their free business listings on Trip Advisor.
- Have campaigns on Expedia to show visitors the range of experiences available.
- Have a programme to measure and track quality across the tourism chain in comparison to other destinations. Includes twice-yearly measurement of all businesses in the tourism chain in Bermuda and their ratings on peer review sites such as TripAdvisor. P&E team goes out and discusses results with tourism suppliers.
- Undertook a two-year long effort to increase Bermuda's Google presence. Hundreds of photos, video and 360 images uploaded to Google Street View, making Bermuda the first island destination to have its entire jurisdiction on the platform. They ensure experience suppliers get free GoogleMyBusiness listings.

Airbnb Partnership

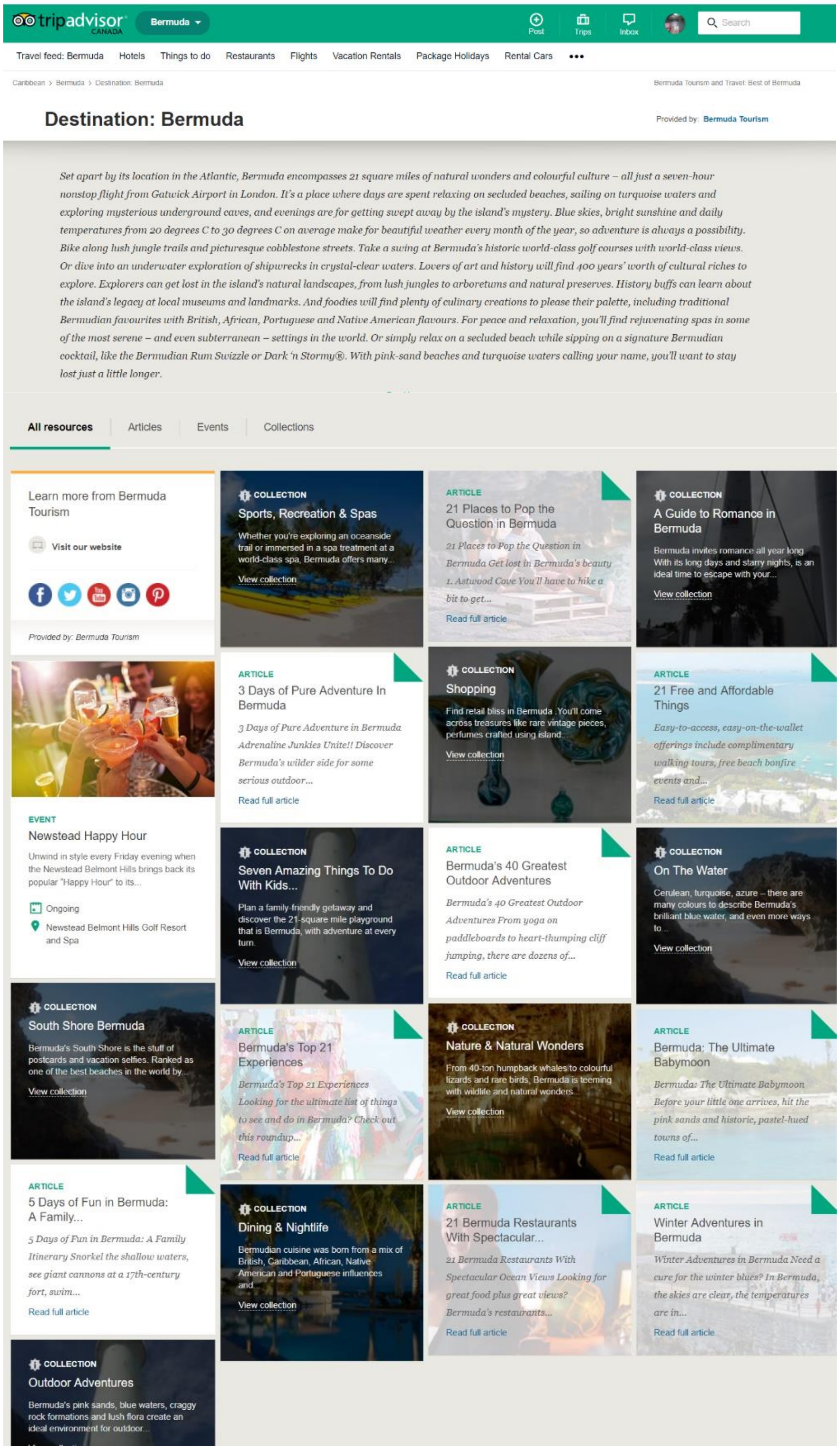
- Have always welcomed instead of resisting Airbnb because they help with the objective of getting local entrepreneurs involved in tourism.
- In March 2017, Bermuda signed an agreement with Airbnb opening a dialogue to discuss industry matters such as marketing, regulation and taxation. in the following months, a series of information sessions were held.
- In October 2018, Bermuda signed a tax and marketing agreement. Airbnb agreed to collect 4.5% vacation tax direct from guests when they book a Bermuda home. Bermuda agreed to use the funds to help promote Bermuda's tourism industry, including the launch of Airbnb Experiences on the island and destination marketing on Airbnb's website and social media pages and in the Airbnb online magazine.
- Airbnb Experiences provided training on Experiences at the Bermuda Tourism Summit in 2018. Information and training sessions took place in November together with them
- The P&E division already had a good database of appropriate hosts to draw upon for Airbnb Experiences, both small tourism businesses and individuals with a passion and great idea but no experience.
- In March 2019, the Airbnb Experiences-Bermuda partnership was officially launched with 17 tours and experiences organized by local entrepreneurs and experts. The initial experiences included a food tour of Hamilton that highlights historic sites, a photography experience led by a local photographer, a walking tour around Spanish Point and Admiralty House, beach volleyball fun, "sip and paint" classes, a drone flight experience and reef tours.
- A two-week long Bermuda-Airbnb campaign in December 2019 generated almost 5 million impressions among Facebook, Twitter and Instagram users.

"Developing memorable experiences for visitors to give them a sense of place and a taste of how we live life were key objectives of Bermuda's first national tourism plan back in 2012, and they've re-emerged as important items of our new plan as well."
Glenn Jones, Chief Product & Experience Development Officer, Bermuda Tourist Authority, on Airbnb Experiences partnership
https://www.travelweekly.com/Caribbean-Travel/Insights/What-does-Bermuda-chief-experience-officer-do

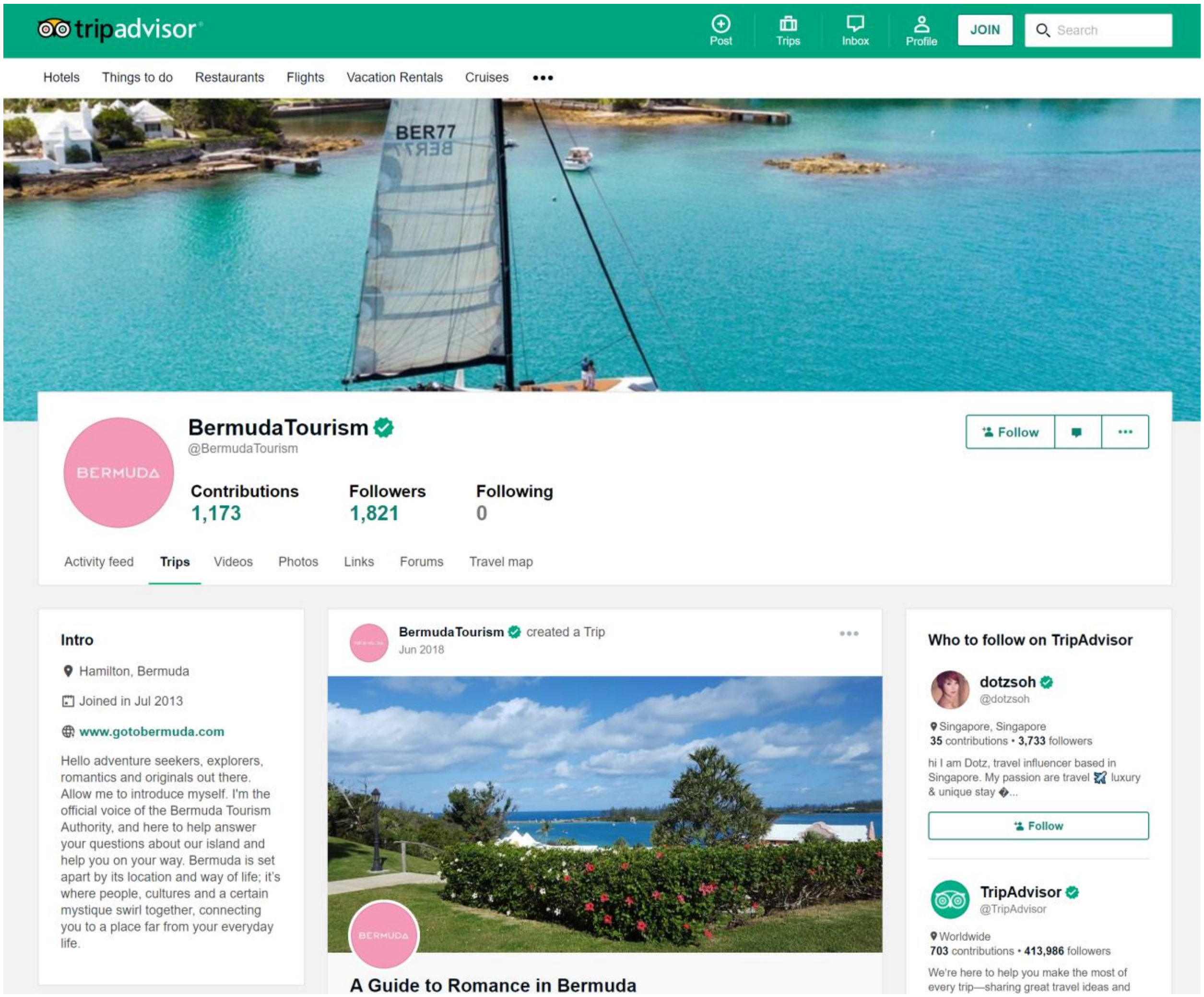
Key Results

- Bermuda's strategy of using experiences, digital marketing and partnerships has significantly contributed to increased leisure arrivals, grown in leisure visitor spending, positive impacts on hotel room nights sold and improved cruise visitor arrivals.
- In 2018, had record-breaking number of total visitors for second consecutive year, the highest number of leisure air arrivals since 2002, visitor spending of over $500 million, and a 34% increase in cruise arrivals during off-peak months.
- Have had strong particularly growth in the 45 years-and-under market, destination weddings and babymoons markets.

The following screenshots show how the Bermuda Tourist Authority (BTA) uses their TripAdvisor destination page and their social media-style destination feed page to promote experiences.



Source: https://www.tripadvisor.com/Destinations-g147255-Bermuda.html



https://www.tripadvisor.com/Profile/BermudaTourism

Annex 4: Cabo Verde Tourist Arrivals and Hotel Nights

These statistics provide more detail on tourist arrivals and hotel nights by island.

Tourist Arrivals & Hotel Room Nights: 2014-2018							
Island	**Category**	**2014**	**2015**	**2016**	**2017**	**2018**	**2018%**
Sal	Tourist Arrivals	224,179	246,157	293,987	343,211	379,086	49.5%
	Hotel Nights	1,577,406	1,823,603	2,062,034	2,517,487	2,765,727	56.0%
Boavista	Tourist Arrivals	177,476	181,771	203,331	206,614	206,236	26.9%
	Hotel Nights	1,470,899	1,544,378	1,664,983	1,656,430	1,671,127	33.9%
Santiago	Tourist Arrivals	71,238	69,963	72,357	78,385	85,830	11.2%
	Hotel Nights	161,339	143,786	150,830	163,061	221,125	4.5%
São Vicente	Tourist Arrivals	32,110	37,345	38,542	45,472	47,017	6.1%
	Hotel Nights	98,622	102,095	109,526	132,000	132,490	2.7%
Santo Antão	Tourist Arrivals	22,370	21,901	22,149	26,080	-	--
	Hotel Nights	67,433	57,779	61,547	71,602	-	--
Other Islands	Tourist Arrivals	12,248	12,250	14,063	17,013	47,527	6.2%
	Hotel Nights	39,133	38,359	43,631	55,223	145,422	2.9%
TOTALS	**Tourist Arrivals**	**539,621**	**569,387**	**644,429**	**716,775**	**765,696**	**100.0%**
	Hotel Nights	**3,414,832**	**3,710,000**	**4,092,551**	**4,595,803**	**4,935,891**	**100.0%**

Source: Tourism Statistics Guests Movement 2018 and Tourism Tables 2018. INE. 2018

Annex 5: Stakeholders' Information and Input

These charts provide more detail on information and input obtained from stakeholders in Cabo Verde.

Tour Operator and Accommodation Consultation: March 2018			
Supplier/Islands	Description	Client Profile	Marketing
All-Inclusive Tour Companies			
TUI Portugal Dawn Fisher Mainly Sal, Boa Vista &São Vicente	Mainstream World's largest tour company. Have own charters, hotels, cruise ships, vehicles, All inclusives 90% of business	Mainly UK (64% winter, 62% summer); German-speaking (15%), Holland (14%), Belgium (6%). Scand winter only (15%) UK: mixed, partyers European: 50+ yrs, active, well-travelled, want unique; higher spending & more trips Scandinavia: - younger; want adventure About 50% purchase tours/ activities	All types. Huge marketing budget Travel trade most important distribution channel
Thomas Cook Sofia Ferreira Mainly Sal, Boa Vista Mainstream	60,000/yr One of the world's largest tour company. All inclusives mainly	UK majority German, Dutch, clients 60% take activities Preferred: Island tour, quads, diving, Cabo Verdean theme nights	All types. Huge marketing budget Travel trade most important distribution channel
Niche Tour Companies			
Agência NOBAI São Vicente Théo Lautrey Nature, hiking, cultural tours	3,000/yr Receptive operator and DMC. Works with companies such as Evaneos	FIT & Groups France, Switzerland, Belgium, Active/Adventure Preferred Activities: hiking mixed with local culture	Mainly travel trade Website
Atlantur Luhena Sanches Santiago	2000/year Receptive, mainly for TUI day trips. Some for Terra Sab (mother company) Mainly bespoke	TUI grps of 10-30 Mostly German, then UK, plus mix of others 40 to 50 yrs Preferred activities: island tours, sightseeing, culture (Cidade Velha, grogue), hiking, walking, water-based	Mainly TUI & other travel trade through trade shows Facebook & website TripAdvisorExperiences (Viator)
Aventura Lena Ehlrich Nature, culture tours Land services for cruises	3,200/yr (1775 individual guests; 1467 cruise guests in 2018)	France, Germany, Austria, Switzerland, Scandinavia, Spain, Holland Preferred: city, cultural and island tours. Smaller groups do exclusive excursions, such as hiking, jeep tours, and bird watching.	Travel trade International fairs Internet

Tour Operator and Accommodation Consultation: March 2018			
Cafe Maracujá Santo Antao Hetty Guddens Retired nature/hiking guide	Micro business Owns café & rural villas, arranges tours for guests	Mainly FIT Many Dutch Also German, French and English market Activities: Hiking with local guides, cachupa course, making grogue, donkeys	Word of mouth Travel agencies Booking.com, hotel sites Facebook
Kiteschool Mitu & DjO Sal Kite & surf school	Mainly runs school, works with tour ops, does some local tours	Mainly FIT, some families France & Germany 30 to 70 yrs Have money Activities: BBQs on beach, local fishing	Word of mouth Travel trade Internet
Nature Excursions Sal Nature & culture tours	Mainly day trips Works with TUI	Many UK Then Dutch, French, German Also, Polish, Portuguese, Czech Popular activities: shark experiences, turtle tour, birding, seadoo safari	Travel trade Word of Mouth Website Walk-ins
Vista Verde Tours São Vicente Heike Alter & Simon Schielke Mother company Reisen Mit sinnen (German) Mainly bespoke Nature & culture Mainly hiking mixed with culture	5000/yr Receptive e.g., for Reisen Mit sinnen, Olimar, World Inside. Archipelago Choice, -Amin Travel, Evaneos	FIT & small groups Mainly Germany & Switzerland; also, Dutch, UK, Israel Spain; Italy 40 to 60 years old; high education & incomes Expect quality, want new experiences Hiking mixed with culture	Mainly through travel trade Direct to consumer through Reisen Mit sinnen site
Accommodation Establishments			
Name	Description	Market & Profile	Marketing
Terra Lodge Owner Théo Lautrey Mindelo, São Vicente booking@terralodge.net +238 2312919	Boutique hotel 60% occupancy on 12 rooms during the year of 2018	French, German, Swiss, Dutch markets, 30-70 years old. Nature and cultural tourists.	Through NOBAI (same owner), other DMCs, word of mouth and Internet (webpage, Facebook, Instagram and Google)
Quinta Cochete Jacques and Dominque Zurcher Ribeira das Patas, Santo Antão Phone: +238/227 22 02 info@quinta-cochete.com	Boutique hotel Located on the rural village of Ribeira das Patas. 45% Occupancy rate, 100% in high season (Dec, Jan, Feb, Apr)	French, German and the Netherlands, Belgium and Switzerland Hiking and culture	Word of mouth, travel agencies and websites

Tour Operator and Accommodation Consultation: March 2018			
Tiduca Spencer tourism Ponta do Sol, Santo Antão +238 225 12 02	Suite hotel Located at the fishermen village of Ponta do Sol	Germany, France, Holland, Belgium and the Netherlands Hiking and culture Business	Travel agencies, word of mouth, online platforms such as Booking
Hilton Patrícia Costa (HR manager)	Luxury hotel	Nordics mostly	Travel agencies, online booking
Meliã Dunas Santa Maria, Sal +242 23 30	All-inclusive hotel	United Kingdom, Germany, The Netherlands, Scandinavia	Tour operators such as TUI and Thomas Cook, online
Hotel Pérola Praia, Santiago +260 14 40	Executive and Business hotel	Business travelers; partner with the main musical event in Cabo Verde – Atlantic Music Expo and Kriol Jazz Festival	Travel agencies; Booking; direct booking;
Casa Maracujá Paul Valley, Santo Antão	Rural villas and restaurant Arranges tours	German, French and English market	Travel agencies; Online platforms (Booking, Facebook)

Most Popular Visitor Tours & Activities: March 2018	
Operator	**Popular Tours & Activities**
All Inclusive Companies	
TUI Portugal	Most popular all islands among 50% of visitors that take tours: Island tour (55% of Sal visitors, 65% of Boa Vista), Boat tours (10% of Sal, 20% of Boa Vista), Romantic or BBQ beach nights (14% Boa Vista, 5% Sal); Off-road (quads, buggies, etc.), (13% Boa Vista, 5% Sal); Diving & water-based (2%), Bike (1%), Spa / Wellness (1%), Walking 1%
Thomas Cook.	Island Tour - 1/2 or full day, off-road, Diving, Cabo Verdean theme night at Hotel Odjo d'Água
Niche Companies	
Agência NOBAI	Hiking, Walking, Cultural activities (cooking lessons, live music)
Atlantur	Hiking, Culture - Cidade Velha, Longara, Sightseeing, Soft adventure, diving and water-based
Aventura	City tours, cultural tours and island tours. Smaller groups do exclusive excursions, such as hiking, jeep tours, and bird watching.
Cafe Maracujá	Hiking with culture - capucha course, how to make grogue, donkey rides
Intercruises (owned by TUI)	Sao Vicente for cruise market: islands tours by jeep or bus; dinner, music & dancing; cooking classes; adventure Jeep tours; cultural attractions; guitar atelier
Kiteschool Mitu & DjO	Kite and surf classes, Night BBQs, Local fishing
Nature Excursions	Shark Experience, Turtle walks most popular. Birdwatching, Seadoo safari quite popular
Vista Verde Tours	Hiking mixed with culture like fruit picking, grogue factory visit, making capucha

Experience Development Recommendations (identified by Stakeholders)	
Stakeholder/ Island / Type	**Experience Recommendations**
Direcção Geral do Turismo e Transportes DGTT, Joel Barbosa (representative Tourism Board São Vicente)	Make guitars and ukeleles Drum ateliers - visiting and making Visit ateliers and hear music, etc. Traditional dance workshops - eg Mazurka in San Nickalau (also historical); San Antao Kola St John; Samba for Carnival

Experience Development Recommendations (identified by Stakeholders)	
Stakeholder/ Island / Type	**Experience Recommendations**
	Carnival - meet different schools and find their plans for the year (what they are doing in different months), learn about the event and history; how to do samba; see how they make clothes, try on costumes from old Extending carnival - Summer carnival done for tourists Sampler meals for cruises - small amounts of things to try Theatre festivals in Nov and Mar - create experiences around them
Chamber of Commerce São Vicente	Agritourism - sport fishing with local fishers, products that can be sold to tourists - cheese, rural tourism trail. Need to work with fishers associations and other groups. Creation of interpretive centers/museums to tell interesting history Make events more sophisticated and promote them Animation - have events for tourists so they leave their hotels Need directional and interpretive signage.
Agência NOBAI São Vicente/ Tour Operator	Voluntourism Maintenance of the hiking paths, new paths
Atlantur Santiago / Tour Operator	Camping, glamping, backpacking Stargazing Culinary experiences e.g., home meals, social dining
Aventura São Vicente / Tour Operator	Infrastructure and service must be upgraded to meet needs of cruise visitors
Cafe Maracujá Santo Antao / Rural Villas	Train local women & do lady-to-lady hiking itineraries Train guides to do local tours, need language training Create network of Grogue distillers Restore trails, infrastructure on trails (washrooms, benches)
Kiteschool Mitu & DjO Sal / Kite and surf school, local tours	Downwind inter-island kiteboard trips Homestays Local experiences
Mestres das Ribeiras São Vicente / Grogue distillery and retail shops	Music – used to be easy to find in São Vicente, like New Orleans Food experiences – home meals, social dining Morabeza – art of welcoming Packaging around events – Creole Jazz, New Year's, Carnival, St John Party, Fogo 1st of May, Summer carnival – preplan, announce dates early so can be packaged for diaspora and locals Need Fast Ferries inter-island
Nature Excursions Sal, Day Tour Operator	Package local events and festivals

Annex 6: Cabo Verde Cruise Tourism Statistics

These statistics provide more detail on cruise tourism in Cabo Verde. (Sources are Enapor and Gilson Cruz data supply).

Cabo Verde Cruise Statistics by Port: 2014-2018										
	2014		2015		2016		2017		2018	
Port	Ships	Passengers	Ships	Passengers	Ships	Passengers	Ships	Passengers	Ships	Passengers
Porto Novo	12	4,275	11	2,339	6	881	9	570	28	2,247
Porto Grande	52	39,159	45	35,684	56	48,627	37	22,802	39	22,672
Porto Tarrafal	0	0	11	251	5	557	5	316	18	761
Porto Palmeira	2	238	4	1,678	6	634	4	338	21	827
Porto Sal-Rei	1	140	0	0	6	2,026	5	1,081	14	458
Porto Inglês	3	235	8	514	4	423	3	147	2	257
Porto da Praia	34	24,096	39	25,862	37	22,846	25	11,914	45	18,200
Porto Vale de Cavaleiros	3	240	10	403	7	1,429	6	339	25	1,384
Porto de Furna	2	184	8	200	0	0	1	43	7	288
Total	109	68,567	136	66,931	127	77,423	95	37,550	199	47,094

Cruise Companies Visiting Cabo Verde: 2018 to 2020	
Aida Cruises	Oceania Cruises
Azamara Club Crises	P & O Cruises
Club Med	Phoenix Reisen
Costa Cruise	Polar Cruises
Cruise & Maritime Voyages	Ponant
Crystal Cruises	Princess Cruises
Fred Olsen Cruise Lines	Pullmantur Cruises
FTI Cruises	Regent Seven Seas Cruises
Grand Circle Cruise Line	Saga Cruises
Hapag-Lloyd Cruises	Scenic
Holland America Line	Sea Cloud
MSC Cruises	Seabourn Cruise Line
Mystic Cruises	Silversea Cruises
Noble Caledonia	TUI Cruises
Norwegian Cruise Line	Variety Cruises

ANV Mindelo Cruise Ships by Size (2018 visits)		
Operator	**Ship**	**PAX Capacity**
MEGAYACHTS & SMALL SHIPS (up to 350 Passengers): By Capacity		
Sailing Classics	Chronos	40
Variety Cruises	Harmony G	44
Ponant	Le Ponant	67
Private	Island Sky	106

Ponant	Le Champlain	180
Private	The World	200
Compagnie du Ponant	Le Soleil	264
MIDSIZE CRUISE SHIPS (400 to 1,700 Passengers)		
FTI Cruises	Berlin	412
Seaborn	Seaborn Quest	450
Hapag-Lloyd Cruises	Europa 2	516
Phoenix Reisen	Amadea	624
Regent Seven Seas	Seven Seas Mariner	700
Holland America	Prinsendam	740
Phoenix Reisen	Artania	1260
Aida Cruises	AidaVita	1,266
Aida Cruises	AidaAura	1,300
Cruise & Maritime Voyages	Magellan	1,452

Annex 7: Cabo Verde Tourist Accommodation Supply

These statistics provide more detail on tourist accommodations by establishment type and by bed capacity.

Accommodation Establishments by type (2018)														
Islands	**Hotels**		**Bed&Breakfast**		**Guesthouses**		**Hotels-**		**Holiday Villages**		**Homestay**		**Total**	
	N.º	%	N.º	%	N.º	%	N.º	%	N.º	%	N.º	%	N.º	%
Sal	15	21	7	8	-	-	4	19	3	30	1	1	30	10.6
Boa Vista	9	12	4	5	-	-	7	33	1	10	5	6	26	9.2
Santiago	27	37	10	11	2	20	4	19	2	20	8	10	53	18.7
São Vicente	9	12	9	10	1	10	3	14	-	-	26	32	48	16.9
Santo Antão	6	8	31	35	4	40	-	-	3	30	27	33	71	25.0
São Nicolau	-	-	6	7	-	-	1	5	-	-	1	1	8	2.8
Maio	1	1	2	2	-	-	1	5	-	-	4	5	9	3.3
Fogo	5	7	14	16	2	20	1	5	1	10	8	10	31	10.9
Brava	1	1	5	6	1	10	-	-	-	-	2	2	9	3.2
Total	73	99	88	100	10	100	21	100	10	100	82	100	285	100.6
%	**25.7**		**31.0**		**3.5**		**7.4**		**3.5**		**38.2**		**100**	

Source: Annual Inventory of Hotel Establishments. INE. 2018.

Accommodation Establishments by Beds (2018)														
Islands	**Hotels**		**Bed&Breakfast**		**Guesthouses**		**Hotels-**		**Holiday Villages**		**Homestay**		**Total**	
	N.º	%	N.º	%	N.º	%	N.º	%	N.º	%	N.º	%	N.º	%
Sal	7,584	47	194	16	-	-	681	49	930	82	…	…	9,404	44.7
Boa Vista	6,162	38	61	5	-	-	383	27	…	…	52	6	6,670	31.7
Santiago	1,409	9	120	10	…	…	152	11	…	…	104	11	1,984	9.4
São Vicente	510	3	196	16	…	…	123	9	-	-	351	38	1,204	5.7
Santo Antão	309	2	332	27	69	40	-	-	26	2	243	26	979	4.7
São Nicolau	-	-	90	7	-	-	…	…	-	-	…	…	109	0.5
Maio	…	…	…	…	-	-	…	…	-	-	28	3	80	0.4
Fogo	191	1	164	13	…	…	…	…	…	…	83	9	500	2.4
Brava	…	…	51	4	…	…	-	-	-	-	…	…	116	0.6
Total	**16,193**	**100**	**1,228**	**100**	**174**	**100**	**1,393**	**100**	**1,138**	**100**	**920**	**100**	**21,046**	**100.0**
%	**76.9**		**5.8**		**0.8**		**6.6**		**5.4**		**4.4**		**100.0**	

Source: Annual Accommodations Inventory 2018 (INE)

Annex 8: Cabo Verde Experience Development Assets

This annex provides detail on experience development assets on the islands included in the study mission, which were Sal, Santiago, Santo Antão and São Vicente. Fogo Island is also included to some extent because many stakeholders said it has excellent potential for locally-hosted experiences. The annex covers: 1) Potential tourism products; 2) Natural and cultural assets that support experience development; 3) Existing and potential experiences, and; 4) Input from stakeholders on preferred activities and recommendations for experience development.

Tourism Potential Products: Select Islands		
Fogo	Potential products	Historical and cultural tourism, nature tourism, diving tourism.
Sal	Potential products	Beach tourism, water sports, diving tourism, whale and bird watching, health tourism (salinas), deep sea fishing, sport fishing, cultural tourism (music festivals).
Santiago	Potential products	Historical and cultural tourism, business tourism, political tourism, beach tourism, diving tourism, nature tourism, sport fishing.
Santo Antão	Potential products	Adventure tourism, nature tourism, cycle tourism, ecotourism, food tourism, diving tourism, rural tourism, Science tourism.
São Vicente	Potential products	Cultural and historic tourism, sand & sea, diving and aquatic sports, nature and adventure tourism, food tourism, and MICE

Source: National Plan for the Development of Tourism in Cabo Verde 2010/2013. Ministry of Economy, Growth and Competitiveness. DGT. No Date.

Protected Areas of Cabo Verde	
São Vicente	
Natural Park of Monte Verde	311,9 ha
Santo Antão	
Natural Park of Cova, Ribeira da Torre and Ribeira de Paul	2091,5 ha
Natural Park of Moroços	818,1 ha
Natural Park of Tope de Coroa	8,491,6 ha
Protected landscape of Pombas	311,9 ha
Cruzinha Nature Reserve	1,117,8 ha
Sal	
Nature reserve of Rabo de Junco	154 ha
Nature reserve of Ponta de Sino	5,747 ha
Nature reserve Costa de Fragata	2,693 ha
Natural reserve Serra Negra	2,627 ha
Natural reserve of Murdeira Bay	6,057 ha
Natural monument Morrinho de Açucar	5 ha
Natural monument Morrinho do Filho	13 ha
Protected landscape of Salinas, Pedra Lume and Cagarral	802 ha
Protected landscape of Monte Grande	1,309 ha
Protected landscape of Buracona-Ragona	545 ha
Protected landscape of Salinas Santa Maria	69 ha

Santiago	
Natural Park of Serra Malagueta	774 ha
Natural Park of Serra do Pico de Antónia	ND
Fogo	
Fogo Natural Park	8,468,50 ha

Natural and Cultural Resources of Selected Islands	
São Vicente	
Main market	Mindelo's main market for groceries
Fish market	Mindelo's fish market and port for the fishermen
CNAD (National centre of arts, crafts and design)	Each November, organizes an art and crafts fair with local artisans from all over the country; used to have and will again have tourist experiences
Centro Cultural de Mindelo	Hosts theatre festivals and diversified cultural events
Palácio do Povo	Hosts a permanent exhibition called AKUABA of African and local ar
Monte Verde	The highest point, has a small herbs garden and sells local tea and infusions
Laginha beach	Mindelo's city beach
Praça Estrela	African market and groceries sale
Baía das Gatas	Beach where the big summer festival "Baía das Gatas" is located.
Norte Baía	Scenic road to Calhau with beach suitable for water sports as surf and bodyboard
São Pedro Beach	Beach suitable for the practice of windsurf and diving. Small hike to a recently renewed path that leads to an abandoned lighthouse, "Farol D.Amélia"
Palha Carga and Calheta	Desert off-road beaches
Viana volcano	Extinct volcano by the area of Calhau. Hike path.
Salamansa	Fishermen village and beach suitable for the practice of Kitesurf
Calhau	Village with beach suitable for snorkeling and visit of small volcanos
Santo Antão	
Cova viewpoint	Mandatory viewpoint during an island tour and start of the hike to the Paul Valley
Natural Park of Moroços	Natural park with 44 plant species identified, from which 24 are endemic.
Natural Park of Cova Paúl - Ribeira da Torre	The hikes throughout this park are very popular and appreciated. The altitude varies between 400m (Xôxô) and Pico da Cruz (1585m)
Paul Valley	The most visited valley on Santo Antão. Several hikes, isits to grogue factories
Janela	Little village where the hike to Pico da Cruz starts (smaller versions are possible). Hosts a well-known local party on the 15th August.
Cruzinha - Fontainhas	Well-known coastal path.
Fontainhas viewpoint	Considered one of villages with the best viewpoint in the world
Ponta do Sol	The most touristic area of Santo Antão. Starting point of path to Fontainhas viewpoint and Cruzinha.
Old road	Old scenic road that leads from Porto Novo to Vila das Pombas on the Paul valley
Ribeira Grande valley	Agricultural valley with vicinal paths for hiking tours.
Delgadinho	Road viewpoint with a narrow road between two valleys.
Porto Novo	Town of ferries arrival and known for its popular party of Sonjon (St.John's)
Topo de Coroa	The highest point on Santo Antão, with 1979m height. Popular for hiking experts
Tarrafal de Monte Trigo	Small picturesque village by the sea
Sal	
Santa Maria Beach	The most famous beach on Cabo Verde, white sand beach and transparent waters
Santa Maria Pier	The pier is a touristic attraction.
Salinas	Salt mines located inside a volcano. Swimming, Spa treatments with clay and salt.
Buracona	Natural swimming pool and the famous "blue eye". Has restaurant and gift shop.
Murdeira	Bay made by volcanic rocks. Suitable for snorkeling and other water activities
Mirage at Terra Boa	Illusion created by heat waves on the sand

Palmeira	Fishermen and port village. Catamaran and sailing excursions depart here.
Santiago	
Natural Park Serra Malagueta	Reaching up to 1064m, this mountain range has several endemic plants and animals. Searched for hiking and birdwatch
Cidade Velha (old city)	First capital of Cabo Verde. UNESCO World Heritage Site.
Fort of São Filipe	Located at Cidade Velha, was created to protect the town from pirates
Church of Nossa Senhora do Rosário	15th century church. Its Manueline side chapel is a rare example of Gothic architecture in Sub-Saharan Africa
Monastery São Francisco	Monastery from the 17th century, renewed recently.
Rua de Banana	Oldest street of Cabo Verde, located at Cidade Velha
Pillory	Rebellious slaves were punished publicly at the *pelourinho*
NP of Pico de Antónia	Highest point of Santiago , with 1394m. Hikings are possible.
Quebra Canela Beach	Praia's city beach
D.Maria Pia Lighthouse	19th century lighthouse, still working
Tarrafal beach	Located at a bay, calm waters and palm trees
Plateau	City centre at Praia, with a pedestrian road surrounded by trees
Concentration camp at Tarrafal	People from Portugal and the former Portuguese colonies that were against the dictatorial regime of the fascist dictator Salazar, imprisoned here.
Rabelados community	Community created by rebels that protested against the catholic religion and hid in the mountains, until they were able to practice their religion. They expressed themselves through paintings and art crafts that are now known worldwide.
Poilão dam	A touristic stopover due the lush vegetation around in rainy years.
"Poilão da Boa Entrada"	Biggest tree in the archipelago - Ceiba Pentandra)
Botanical Garden	The National Botanical Garden Grandvaux Barbosa is the only botanical garden in Cabo Verde. Its collection focuses on endemic and native plants of Cabo Verde. The garden was created in 1986. Covers 20,000 m^2.

Existing Tours & Activities (identified by consultants)	
Sal Island	
Several tours by Explore Cabo Verde.	Explore Cabo Verde is committed to promoting a sustainable form of eco-tourism, whilst highlighting the natural beauty of Sal and its amazing wildlife. They also donate a percentage of every excursion directly to conservation efforts on Sal Island.
• Shark Experience – Learn about lemon sharks and their natural habitat. 25€ adult/ 25€ child • Turtle walks – watch the nesting of a loggerhead turtle, from July to October. 30€ adult/ 30€ child • Seadoo Safari - Possibility to watch the nesting of a loggerhead turtle, from July to October. 55€ adult • Guided cycling - Visit of Santa Maria. 30€ adult • Historical Sal – Discover Sal Island history, music and culture. 35€ adult/ 23€ child • Bike&Hike – Santa Maria, Salinas and Serra Negra. 35€ adult • Family Adventure – Rockpooling, beachcombing, dune jumping. Kite beach visit. 25€ adult/ 15€ child • Birdwatching – guidebooks and binoculars provided.	
Full day sailing trip by Always Sailing	Anchoring, swimming, snorkeling, fishing and full lunch /Adults 99€, children (from 0 to 12) 75€
Mitu&Djo Kiteschool Kitesurf, surf and SUP school for beginners and experts	• Kitesurf:99€ for 3h kite intro for groups/120€ for 2 hours' kite intro pp/ 35€ per private surf lesson • Barbecue on the beach • Fishing with locals
Buracona development and restaurant by Luciano Teixeira	Discover Buracona and visit of the Blue Eye. Wooden path all over volcanic rocks with signals and indications. Access to natural swimming pool, restaurant and gift shop. 5€ per person / Meals between 10€ to 40€

The Beach School Project Ben Watson	Teaching English for free on the islands via fundraising. Possibility of creating music workshops with children
São Vicente	
Paragliding school by Altitude.cv	1 week (6 days/7 nights) – 1.495€ 2 weeks (12 days/14 nights) – 2.695€ 3 weeks (18 days/21 nights) – 3.595€ 4 weeks (24 days/28 nights) – 4.495€ * Each week with 6 flying days and 7 nights' accommodation. Price includes training, equipment rental, local transport, accommodation and breakfast.
Cheese Factory Experience by Ojuara's Nídia Araújo	Learn how to make goat cheese, knowing the whole process, from milking until the cheese is ready for consumption and take home some samples. 29€ pp
Guitar workshop visit	Learn the process of making a traditional instrument such as the Cape-Verdean "cavaquinho" and private concert with the instruments. For groups and individual clients. Price: between 20€ to 50€ per person.
Shop experience Cap Vert Design Handcrafts and design shop	Social shopping experiences
Grogue experience - Mestres das Ribeiras Jérome and Kenya Cretegny	Experience on the grogue making and other local products; Owns souvenir shop at Hilton; Santo Antão Port and will inaugurate a new one on Sal airport.
Mamdyara Natural cosmetics Rosana Lima	Experience on creation of natural cosmetics and its use; Massage with natural homemade oils and hair treatment.
Several experiences by Voluntourism São Vicente	Voluntourism São Vicente develops authentic Cape-Verdean experiences with people from these communities. The money generated from these experiences reverts entirely to the community.
• Traditional Cape-Verdean meal cooked over a fire • Kizomba and Capoeira classes • Hikes to Monte Verde and Fateja with traditional lunch • Island tours on São Vicente and Santo Antão • Seasonal events experiences (Carnival, Baía das Gatas Festival and New Year's eve	
Santo Antão	
Canyoning by Pé la no ar Olivi	Canyoning experience with local lunch at the end. Several tracks/ 75€ per person
Lagedos project Creator Leão Lopes	Traditional meals at the restaurant Babilónia that is part of this project; Local produce fair.
Grogue Experience – Beth d'Kinha Owned by Edson Silva	Not yet developed but with potential to do so, as all the infrastructures and products are there.
O Curral Alfred Mandl; Christina and Fernando Mandl	Food with local produce made on an open kitchen - fresh garden, meat, cheese Explain the different foods, visit animals and garden Show how to harvest sugar cane.
Agritourism	Helping on farms, eg. seasonal fruit picking
Santiago	
Badia Natural cosmetics Owner Lúcia Cardoso	Interest in creating experiences, such as learning how to make soaps and the use of different Cape-Verdean herbs. Vast knowledge on plants and its use

Rabelados Sabino Gomes (chief)	Village with a unique story of how it was created. Tours already being made. Unique houses and art made by the community. Painting and ceramic lessons can be made.
Concentration camp Tarrafal	Visit to the former Portuguese concentration camp of Tarrafal. Ticket: 3€ per person.
All islands	
Restaurants – cultural meal	12€ to 25€ per person/ Group menus are possible.
Restaurants – music and food experience	Dinner with live Cape-Verdean music and typical food./ 12€ to 25€ per person. Group menus are possible.
Island tour - Visit of the iconic places on the islands. By: Explore Cabo Verde; vista verde tours; Atlantur; Aventura, NOBAI; TUI Portugal, and most part of the operators on the islands	Varies according to island and number of people. For 1 PAX the price range varies from 90€ to 150€/ for groups it can be from 20€ to 70€ per person. Agencies sell it for international tour operators normally with a 10 to 15% reduction on direct price.
Fishing like a Cape-Verdean	Used to be offered by TUI but it was cancelled due to increased safety standards. Price: 39€ per person
Home dinners	Traditional dinners at local houses. +/-25€ per person
Cachupa experience	Visit the market with a chef and buy ingredients to cook the traditional cachupa dish. +/-30€ per person

Potential New Locally-Hosted Tours and Activities (identified by consultants)	
All islands	
Artists tour	Visit to ateliers and galleries. Painters, artisans and designers.
Bonfire night with traditional tales storytelling	Cape-Verdean witches and ghost stories around a bonfire on beach.
Cape-Verdean food tasting	Sample the most iconic dishes of the all the Cabo Verdean islands.
Cape-Verdean poetry session	Get to know most known Cape-Verdean poets in a private declamation session
Clay workshop	Traditional pottery making with local artisans.
Endemic plants experience	Learn the medicinal and food usages of Cape-Verdean endemic plants, as well as the mystical meaning behind some.
Fishing and barbecue at the beach	Traditional fishing and barbecue at the beach.
Panu di terra experience	Learn how traditional Cape-Verdean fabric is made and the history behind it. Demonstration of traditional dance where it is used
Sailing concert	Traditional concert on board of a sailing boat
Traditional dance workshops	Learn the basics on the different type of Cape-Verdean dances, such as batuku, funaná, coladera, Kola Sonjon, Zouk

Annex 9: Experience Listings- Cape Verde & Comparable Destinations

This annex provides more details on the types of experiences listings in each Cabo Verde and comparable destinations, as discussed in the benchmark assessment in Section 7.2.

Tours Tickets & Activities (Selected) # of Each Type: P2P Marketplaces

Destination	Airbnb Experiences: Total experiences	Art	Classes & Workshops	Cooking	Entertainment	Food, Wine, Nightlife	Health & Wellness	History	Music	Nature	Nightlife	Social Impact	Sports	Surfing	Get Your Guide: Total Tours/Activities	Cruises & Water Tours	Cultural & History	Day Trips	Nature & Adventure	Sightseeing Tours	Themed Tours	Tours	Water Sports
Cape Verde	No presence														No presence								
Azores	31	1	8	4	1	9	2	0	0	7	0	0	18	1	49	0	14	22	44	17	12	46	21
Canaries	275	30	50	8	3	45	25	3	2	50	1	6	140	2	407	81	87	100	220	228	96	386	219
Madeira	46	0	1	1	0	6	0	1	1	15	0	0	27	2	178	0	43	50	132	100	56	167	0
Mallorca	155	23	37	9	3	38	20	4	1	30	0	77	75	0	156	0	37	31	56	66	36	131	75

Tours Tickets & Activities (Selected) # of Each Type: OTAs

Destination	Viator: Total Shop Tours & Tickets	Classes/Workshops	Cruise/Sailing/Water Tours	Cultural & Themed Tours	Day Trips & Excursions	Family (Kid) Friendly	Food, Wine & Nightlife	Luxury & Special Occasions	Multi-day & Extended Tours	Outdoor Activies	Private & Custom Tours	Shore Excursions	Sightseeing Tickets	Spa Tours	Tours & Sightseeing	Walking & Biking Tours	Water Sports
Cape Verde	128	2	13	30	18	59	5	7	7	76	17	15	1	6	61	13	12
Azores	376	0	2	3	7	7	0	8	4	9	17	5	0	0	10	4	3
Canaries	963	24	143	75	130	75	44	30	19	214	60	19	58	8	205	53	211
Madeira	468	3	34	56	58	127	20	83	31	244	94	116	5	0	260	80	31
Mallorca	198	1	25	6	12	6	19	3	3	27	14	8	2	0	35	63	23

Destination	Expedia: Total Tours & Tickets	Classes/Workshops	Cruises & Boat Tours	Cultural & History Tours	Day Trips & Excursions	Family (Kid) Friendly	Food, Wine & Nightlife	Luxury & Special Occasions	Outdoor/Adventure Activities	Private & Custom Tours	Shore Excursions	Shopping	Sightseeing Tickets	Spa Tours	Tours & Sightseeing	Walking Tours	Bike & Mt Bike Tours	Water Activities
Cape Verde	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Azores	77	1	11	14	6	44	2	0	31	2	0	0	0	0	49	12	0	4
Canaries	271	23	42	40	22	149	22	0	45	9	1	2	0	5	139	6	3	48
Madeira	102	0	12	5	13	64	5	0	31	17	0	2	0	0	64	8	0	1
Mallorca	117	1	7	6	3	66	4	0	3	4	0	0	1	0	21	2	0	3

Based on analysis of websites between Apr 11-19, 2019

Annex 10: Cabo Verde Tour Operators

This annex provides lists of nature and culture and mainstream and cruise serving tour operators and travel agencies with offices in Cabo Verde.

Cabo Verde Nature and Culture Tour Operators and Travel Agencies

Agencies	Location	Contact	Responsible	Company type
Atlantour	Santiago - Praia	912712	Luhena Sanches	Small company /Part of Terra Sab Group. Focus on the islands ofd São Vicente, Santo Antão and Santiago/Receives around 2500 tourists per year/ Organizes adventure travel and cultural excursions
Aventura	Mindelo - São Vicente	2316609	Lena Ehrlich	Small Company. Employs less than 50 people. Receives around 3000 tourists per year
Helios	Mindelo - São Vicente	+238 958 98 10	Hélio Lima	Micro Company. Employs less than 10 people. Receives around 1000 tourists per year
MORABITUR	Stª Maria Espargos	2422070	Benoit Vilain	Part of Terra Sab Group. Focus on the islands of Sal and Boavista.
NOBAI	Mindelo - São Vicente	2310067	Théo Lautrey	Small Company. Employs less than 50 people. Receives around 3000 tourists per year
NOVATUR	Estádio do Côco	2618424/2612717	Ângela Silva	Small Company/ employs less than 50 people/ receives around 2500 tourists per year/ has packages for domestic tourists and offer experiences such as birdwatching
PRAIATUR	Praia - Santiago	2615746/47	Alfredo Rodrigues	Small company/ employs less than 50 people/ receives around 3000 tourists per year/ Specialized excursions such as Sports fishing and diving
QUALITUR	S. Filipe	2811089	Fátima Louro	Part of Terra Sab Group. Focus on the islands of Fogo and Brava
Vista Verde Tours	São Vicente - Mindelo	9930788	Heike Alter	Small company. Employs less than 50 people. Receives around 5000 tourists per year
Zebra Travel	São Filipe - Fogo	2813373	Luisa Lopes Jorsengen	Micro Company / employs less than 10 people/ receives around 1500 tourists per year. Accommodation is a primary source of income (Casa Colonial on Fogo Island)

Mainstream and Cruise Tour Operators

Name	Location	Contact	Responsible Person	Company Type
ANAV - RAI	Praia - Santiago	2603108	Orlando Rodrigues	Logistics for cruises arrivals
ANV - VXE	S.Vicente - Mindelo	2313333	Lucialina Santos	Logistics for cruises arrivals
Intercruises	Mindelo - São Vicente	suelisimone.rocha@ic.intercruises.com	Suely Cruz	Ground activities for cruise clients
Multiviagens Tour	Praia - Santiago	9921010	Mário Sanches	Agency from the director of ANAVCV
ORBITUR	Praia - Santiago	2611215/2615736/37	Maria Oliveira	Flight tickets sale and domestic excursions
TROPICTOUR	S.Vicente - Mindelo	keithnilton(Skype)	Victor Rocheteau	Transfers and domestic tourism
TUI Portugal	Sal - Santa Maria	9985805	Dawn Fisher	Excursions and activities for TUI clients and clients from partners

Annex 11: Ideal Guest Persona

A persona is the description of a fictional ideal guest. Creating a persona of the ideal guest helps tourism suppliers meet their guests' needs and wants better, which makes their tours and activities more appealing to buy. The elements the persona should cover are below, followed by a persona template. An example persona is provided on the following page.

<table>
<tr><th colspan="3">IDEAL GUEST PERSONA</th></tr>
<tr><td colspan="3">The persona should answer:
What is the name and age of the persona?
Where do they live, and what is their personal situation?
What are their motivations in life and in travel?
What are their interests and activities in life and in travel?
What are their travel planning and booking habits?
What sources of information do they use when planning a trip?</td></tr>
<tr><th colspan="3">IDEAL GUEST PERSONA FOR:</th></tr>
<tr><td rowspan="2">Motivations:
•</td><td>Age:
Gender:
Family Status:
Children:</td><td rowspan="2">Travel Planning and Booking:
•</td></tr>
<tr><td rowspan="2"> Name:
Source: CC BY</td></tr>
<tr><td rowspan="2">Interests & Activities:
•</td><td rowspan="2">Sources of Information:
•</td></tr>
<tr><td>Location:
Education:
Occupation:
Income:</td></tr>
</table>

FICTIONAL COMMUNITY TOURISM TRAVELER EXAMPLE

Motivations:

- Sees work as a means to travel
- Travels to meet like-minded travelers
- Enjoys being part of the global community of solo travelers

Age: 57 years
Gender: Female
Family Status: Widow
Children: One, now an adult

Source: CC BY

Name: Sandra Tourist

Travel Planning and Booking:

- Enjoys investigating new places
- Does online research to find safe places and understand the area
- Value-conscious; stays in high-quality local places, eats local
- Buys experiences online sometimes

Interests & Activities:

- Amateur artist
- Enjoys art tours
- Likes to study local history
- Wants to learn about local life, to sample quality local food & drink

Location: Florida
Education: Graduate Degree
Occupation: Teacher
Income: US$65,000

Sources of Information:

- Trip Advisor reviews
- Family, solo travel friends
- Facebook
- Instagram
- Google maps
- Airbnb Experiences, ToursByLocals

Annex 12: List of Stakeholder Meetings

Date	Entity	Contacts	Island
3/24/2019	Mestres das Ribeiras	Kenya and Jérôme Cretegny - Owners /https://www.facebook.com/Mestresgrogue/ | +238 9779035 / jerome@mestresgrogue.com Kenya@mestresgrogue.com	São Vicente
3/25/2019	CNAD - / National Centre for Crafts and Design	Irlando Ferreira - Director/ https://www.facebook.com/CentroNacionaldeArtesanatoeDesign/ | irlandoferreira@rrn.gov.cv | +238 231 77 51	São Vicente
3/25/2019	Cap Vert Design	Françoise Ascher and Olivier - Owners / https://www.facebook.com/capvertdesign/ www.capvertdesign.com / contact@capvertdesign.com / +2382325837 | +2389875853	São Vicente
3/25/2019	ANV - Agência Nacional de Viagens / National Travel Agency	Humberto David - Port Agent / humberto.david@anvsv.cv / https://anvsv.cv	São Vicente
3/25/2019	vista verde tours	Heike Alter and Simon Schielke - CEO and General Manager / https://www.facebook.com/vistaverdetour https://www.vista-verde.com/de | ha@vista-verde.com	São Vicente
3/26/2019	TUI and Intercruises	Dawn Fisher (TUI responsible for Cape Verde) - dawn.fisher@tui.com / Suely Cruz (Intercruises Representative Cape Verde) - www.intercruises.com | suelisimone.rocha@ic.intercruises.com	São Vicente
3/26/2019	Chamber of Commerce of the Barlavento	José Lopes - Representative /http://www.becv.org/ jose.lopes@becv.org	São Vicente
3/26/2019	Bombu Mininu	António Tavares and Miriam Tavares (owners) | bombumininu@gmail.com	São Vicente
3/26/2019	Centro Cultural de Mindelo	António Tavares (Director) | centroculturaldomindelo@gmail.com	São Vicente
3/27/2019	Centro de Interpretação e Posto de Turismo de Porto Novo - Projecto RAÍZES	www.raizes.adpm.pt | 002383522059 | raizes.adpm@gmail.com | https://web.facebook.com/RAIZESdeSantoAntao/	Santo Antão
3/27/2019	Quinta Cochete	Jacques et Dominique Zurcher (owners) |www.quinta-cochete.com | 00238 2272202 / 002389573607 | info@quinta-cochete.com	Santo Antão
3/27/2019	Projecto Lagedos	Communitary project developed by Leão Lopes from Atelier Mar (https://ateliermar.wordpress.com/) leaolopes@cvtelecom.cv	Santo Antão
3/28/2019	Beth d'Kinha	Grogue factory | Edson Silva (owner) | 00238 9753429 | edsonsilva@sapo.cv	Santo Antão
3/28/2019	O Curral	Alfred Mandl, Fernand Mandl and Christine Mandl (owners) www.grogue.de / www.alsatour.de | 00238 2231213 / 5864399 /5966033 | alfred@alsatur.de / christine@alsatur.de/ fernand@alsatur.ch	Santo Antão
3/28/2019	Casa Maracujá	Hetty Guddens http://www.casamaracuja.cv| casamaracuja@gmail.com	Santo Antão
3/29/2019	DGTT	Joel Barbosa (representative Tourism Board São Vicente) joel.barbosa@mtt.gov.cv	Santo Antão
3/30/2019	Mitu&Djo Kiteschool	Mitú Monteiro (Kitesurf World Champion) - mitucaboverde@gmail.com | 002389952654/ 00393453036666	Sal
3/30/2019	Paradise Beach	Edward Cotter (owner) and Laura Ramos (general manager)| www.paradisebeach-capeverde.com | 00238 9917253 / ned.cotter@ecp.ie	Sal
3/31/2019	Cultural café / Buracona development and restaurant	https://www.facebook.com/luciano.sal.908 / 002389754217	Sal
3/31/2019	Thomas Cook Cape Verde	Sofia Ferreira (Destination Manager) | 00238 9878857 / 00238 2429730| sofia.ferreira@on-travelsolutions.com	Sal
3/31/2019	Hilton	Patrícia Costa (HR manager) | 00238 9770095 | costa.pati@gmail.com	Sal
3/31/2019	Explore Cape Verde	Jonathan Jones (owner) | 00238 5901549 / 0044 7763063143 | info@explorecv.com | www.explorecv.com	Sal
04/01/2019	Cape Verde Tips	Cheryl Thomas (Owner) | 00238 983 1069| www.capeverdetips.co.uk	Sal
04/01/2019	The Beach School Project	Andrea and Bem Watson (Directors) | www.thebeachschoolproject.com | andrea@thebeachschoolproject.com / ben@thebeachschoolproject.com	Sal
04/01/2019	EHTCV (Cape Verdean hospitality and tourism school	Dalia Gomes (course director and former Travel Foundation coordinator) | dalia.gomes13@gmail.com	Sal
04/02/2019	Ministry of Tourism and Transports	Vladimir Fonseca (Special Advisor) | vladimir.fonseca@mtt.gov.cv | 00238 2604818 / 00238 5170889	Santiago
02/04/2019	Associação de Turismo de Santiago	Eugénio Inocêncio | eugenioinocencio@gmail.com | +2389912000/ +2382628321	Santiago
04/03/2019	Rabelados	Sabino Gomes (Rabelados chied) | https://www.facebook.com/profile.php?id=100010337012360	Santiago
04/04/2019	238.cv	Olubenga Adesida (Director) | oadesida@africainnovationsummit.com | 00238 9836054 / 00238 26203399 | 222.africainnovationsummit.com	Santiago
05/03/2019	Câmara Municipal de São Vicente	Jandira.C.Gomes@cmsv.gov.cv	São Vicente
05/05/2019	Ojuara	Consultant at Ojuara - miguel_louro_88@hotmail.com	São Vicente