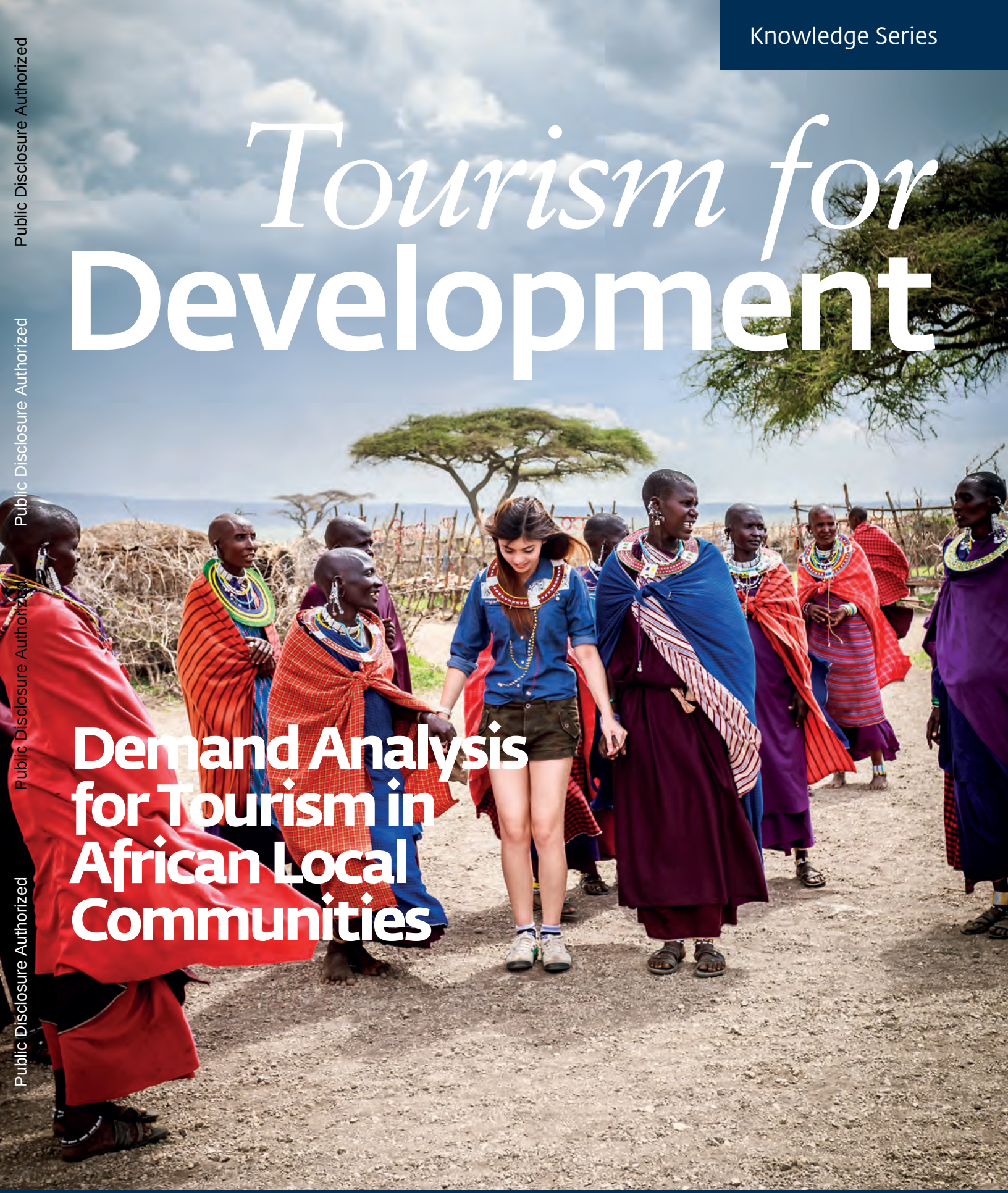
Knowledge Series

Tourism for Development



Demand Analysis for Tourism in African Local Communities

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Contents

Acronyms

ABTA	Association of British Travel Agents
ATTA	Adventure Travel Trade Association
CAGR	Compound Annual Growth Rate
CBT	Community-based Tourism
DMC	Destination Management Company
EU	European Union
FIT	Fully Independent Traveler
HVLD	High-value Low-density
NGO	Non-Governmental Organization
OTA	Online Travel Agent
S.A.V.E.	Scientific, Academic, Volunteering or Educational Purposes

Executive Summary

Overview of Tourism in Local Communities in Africa

Demand Analysis for Tourism in Local Communities in Africa estimates that this kind of tourism, hereafter called Community-Based Tourism (CBT), is undertaken by around 20% of adventure tourists to the African continent, accounting for 3.8% of all tourist arrivals. The CBT market is segmented into four main types of product:

- CBT Experiences
- CBT Experiences with Accommodation (Homestay)
- Tour of Multi-CBT Experiences
- CBT Volunteering Adventures

The market for CBT in Africa is driven by CBT Volunteer Adventures, which accounts for more than one half of CBT (53.6%), and the market is well established with a presence in most African countries. The segment has strong ties with the conservation sector, supporting the long-term sustainability of African wildlife and the environment, while providing economic benefits for local communities.

The market for other types of CBT is less developed. The number of CBT visitors taking part in CBT Experiences with Accommodation (Homestays) is particularly low as a result of poor-quality accommodation supply and subsequent lack of demand. There is a wider range of CBT Experiences that do not involve accommodation, present in varying degrees throughout established and emerging destinations, which play an important role in growing supply and generating market demand.

Europe and North America are the major source markets for CBT, and the most prominent markets include the USA, UK, Germany, France and Netherlands. CBT tourists share many characteristics of the adventure tourist across the broad demographic groups of Baby Boomers, Generation X and Millennials, and these can be further categorized by spending power and time availability, as:

- Time Rich/Cash Rich
- Cash Rich/Time Poor
- Time Rich/Cash Poor

One of the major global travel trends today is the increasing demand for authentic travel experiences, as increasing numbers of tourists seek to immerse themselves in local cultures and environments to generate a greater understanding of the destination and culture. Consultations with tour operators show there is an increasing interest in CBT experiences as part of a wider trip, although there is a level of expectation from CBT tourists wanting to stay overnight that revolves around authenticity, comfort and cleanliness.

Key Recommendations for CBT Enterprise Development

The high yielding Cash Rich/Time Poor market segment (which includes families) is particulalry underserved by CBT in Africa. There is an opportunity to develop CBT products—especially more CBT Experiences with Accommodation to try to capture more of this market. This requires a shift in the types and standard of product that is currently on the market

Based on this study, the following recommendations are provided for practitioners involved in the creation and management of tourism products in local communities in Africa.

Tourists seek to immerse themselves in local cultures and environments to generate a greater understanding of the destination and culture.

1. Establish Cultural Integrity

Authenticity is the most important factor for visitors, consequently, it is essential that products and services are developed with sensitivity and a high degree of ownership from the community concerned.

2. Sustainability and Community Involvement

It is crucial to establish all types of CBT in conjunction with local communities in order to avoid any negative impacts that may arise, such as conflicts between community members, and facilitate the sharing of benefits. CBT experiences should be underpinned by internationally recognized sustainable best practice.

3. Meeting Tourist Expectations

Understanding the expectations of the international CBT tourists is crucial to developing a successful CBT experience. For accommodation providers, a reasonable level of comfort and cleanliness is paramount.

4. Destinations and Location

While immersive community experiences are the primary draw, being close to a major attraction, such as a safari park, recreation area or cultural site, can act as a tourism driver to the region. Consequently, CBT opportunities should be conveniently located so they are easily accessible from current tourist routes. Such routes are typically either tour operator itineraries or routes used by independent tourists who are making their own travel arrangements.

5. Value-driven Pricing

Pricing is a less sensitive issue as CBT tourists are prepared to pay relative high amounts for authentic experiences and accommodation they consider to be of value to the community. Consequently, transparency is important so the CBT tourist believes they have made an important contribution.

6. Keys to Success

The key areas that will support the development and successful delivery of CBT to the African continent have been identified as:

- Development of products in reasonably close proximity to major tourist sites (up to 4-6 hours' travel away) where cultural assets are strong and/or aligned with key tourist routes and circuits.
- Food is a growing global cultural trend and could be an important growth driver for the CBT market.
- CBT development should be appropriate for the key markets, with particular consideration to authenticity, comfort and cleanliness.

1. Background, Definitions and Methodology

1.1 Background

Sustainable tourism is a proven tool for development, benefitting communities in destinations around the world. As demand for global tourism continues to grow, the opportunities for sustainable development and inclusion also increase. The World Bank Group supports the development of the tourism sector and its contribution to our twin goals of reducing poverty and increasing shared prosperity.

The rise of the digital economy and the many digital platforms that promote direct interaction and commerce between tourism service providers and consumers provides an opportunity for greater inclusion in the sector. Inclusion in this context refers to individuals, entrepreneurs or small businesses that were previously excluded from sector participation due to discriminating factors such as their gender, age, size, capacity or location. There is some evidence[1] to suggest that, in theory, digital platforms in tourism can facilitate greater access to markets for excluded groups, including local communities and the hosts or experience-providers in those communities. In Africa, however, there is little known about the market for such products and what the shape of this demand might look like. It is important to consider the characteristics of demand (the tourists) before developing further supply.

This report aims to provide a market overview that describes the main characteristics and size of current and future demand for tourism products delivered by and based in local communities in Africa. If demand is better understood, supply can be better developed and better placed to take advantage of the market access opportunities offered by the growth in digital platforms. Increased supply that is performing well will yield development results for marginalized communities and help to increase shared prosperity.

1.2 Scope of Project and Definition

The report is concerned with tourism products and services that are delivered by and/or based in local communities in Africa. The product being sold is linked to the community and generally provides some form of authentic experience of the community. The report uses the term Community-Based Tourism or CBT to encapsulate this, and is further defined as:

- Accommodation homestays in 'underserved' areas (remote areas, poorer neighborhoods, marginalized or informal settlements).
- Experiences within these communities, such as guided walks, tours, classes, etc.

The definition does not explicitly refer to CBT as being a collective project (as per the more traditional definition of CBT), but more to the environment in which the tourism product is developed. Products and experiences may be delivered by collectives, cooperatives, associations, and also individuals, but all offer an element of culture, authenticity and local experience. CBT in this report falls under the umbrella of 'responsible tourism', defined as making better places for people to live in and better places for people to visit.

1.3 Methodology

The research to assess the characteristics, size, and scale of the CBT tourism market was comprised of two phases: primary and secondary research. From this research recommendations were made.

Primary Research

Individual telephone consultations were carried out with 10 selected tour operators and destination management companies (DMCs).[2] Their selection was based on the overarching criteria that the tour operators travel to or are based in Africa, and include CBT experiences of some nature within their African travel portfolios.

[1] Bakker, M & Twining-Ward, L.(2018). *Tourism and the Sharing Economy: Policy & Potential of Sustainable Peer-to-Peer Accommodation (English)*. Washington, D.C.: World Bank Group.

[2] Tour Operators and DMCs Interviewed: African Connection Tourism (Senegal), African Impact (South Africa), Audley Travel (UK), Aventour (Madagascar), Explorations Company (UK), Lokal Travel (USA), Maisons du Voyage (France), Red Rocks Initiative (Rwanda), Travelworks (Germany), and Transfrontier Parks (South Africa and Mozambique).

Secondary Research

Extensive desk-based research was conducted, consulting a wide range of trusted sources such as the Adventure Travel Trade Association (ATTA) and the World Tourism Organization (UNWTO), that have been built up over many years' experience. Findings from the Tour Operator interviews were amalgamated within the research.

1.4 Development of the Sector

The sector first evolved through volunteer projects supporting communities across the developing world, typically coordinated by non-governmental organizations (NGOs), such as the USA's Peace Corps and the UK's Voluntary Service Overseas (VSO). Today, there are hundreds of similar NGOs and tour operators that continue to place volunteers and interns in projects that help empower communities all over the world.

The sector has grown significantly over recent years, driven by the changing needs of an increasingly discerning tourist and their demand for an authentic travel experience that go hand in hand with the desire to make a positive contribution to the places they visit. Shorter CBT experiences emerged through the provision of short-stay tourist accommodation in local homes, known as homestays, and during their stay, guests often get involved in community-led activities, such as preparing a meal or helping with the harvest. Now, many communities run village tours, teach handicraft-making and cooking, conduct safari drives and operate a multitude of trips to enhance the tourist experience and maximize benefit for the community. Hence, successful CBT projects are mutually beneficial, whereby tourism provides local employment and income for the community, while the tourist and hosts enjoy a meaningful and immersive cultural exchange.

1.5 Benefit and Risk Analysis of CBT

1.5.1 Benefits

The potential benefits of CBT to the communities are varied and multiple, including:

- Brings external recognition and attention to a community.
- Diversifies economic activities for the community.
- Stimulates community pride and protection of community resources.
- Involves and encourages the participation of women and young people.
- Provides an alternative form of income, which in turn helps safeguard the livelihoods and well-being of both local and indigenous communities.
- Facilitates natural or cultural resource-based conservation, such as where the main product is wildlife or cultural heritage.
- Empowers local communities to form joint ventures with external organizations/companies.

In exchange for these benefits, the tourist can expect to enjoy:

- An experience they can only have in this community, learning first-hand about a community's lifestyle and traditions from the community itself.
- A deeper connection to the destination.
- The knowledge that their tourism contribution supports cultural preservation, long-term habitat conservation, and species preservation and other forms of conservation.
- Transparency about whom their tourist dollar supports and feeling good about helping a community with limited economic resources.

1.5.2 Risks

Conversely, the development of CBT can be challenging, for a number of reasons:

- Rivalries within communities on account of the complexities of traditional hierarchies and jealousies that can arise, as other community members not involved in CBT do not benefit from a new income stream.
- Lack of local skill, expertise, economic awareness and information can lead to poor implementation of the product and external exploitation by third parties.
- Infrastructural challenges, such as water supply, power and access (roads, airports).
- Quality of tourism product, such as poor accommodation or food with improper sanitation that do not meet international tourism standards.
- Neglect of other daily community tasks in favor of CBT activities, that causes a breakdown of the community's normal routines, social cohesion and necessary tasks.
- Negative impact of tourism: If not managed appropriately, a situation of overtourism or 'voyeurism' could arise, whereby the community begins to resent visitors (too many, too few, poor visitor behavior). Resentment and poor visitor management damage the visitor experience - particularly the authenticity - and will cause it to fail.

1.6 Community-Based Tourism

The CBT sector is wide-ranging, and there is commonality between the products within it, how they are developed by the community, marketed and sold; consequently, no specific standard has been universally accepted. For the purposes of this report, CBT has been segmented into four main product types in order to identify appropriate source markets of visiting tourists. However, it is important to note there is often overlap between these:

- CBT Experiences (2-3 hours, up to one day).
- CBT Experiences with Accommodation (Homestays) (1-3 nights).
- Tour of Multi-CBT Experiences (7-14 nights).
- CBT Volunteering Adventures (any duration).

Tourism provides local employment and income for the community, while the tourist and hosts enjoy a meaningful and immersive cultural exchange.

The distinction between the different CBT products is outlined as follows:

1. CBT Experiences

- **Duration**: 2-3 hours, half-day or day-long trips.
- **Details**: CBT Experiences often commence from an urban destination or tourism hub, or from hotels in rural locations. Such experiences include visits to local plantations; culture walks around local villages; meeting local people over food/drink; food trails, cooking and other local handicraft-making classes; enjoying meals with local families; attending festivals and events; shopping in local markets; guided trips to view wildlife in parks close by.
- **Typical Providers**: Communities, villages, collectives, cooperatives, associations, NGOs and individuals.
- **Booking**: Can be booked independently as an individual activity, or pre-booked as part of a longer trip through a tour operator.

2. CBT Experiences with Accommodation (Homestays)

- **Duration**: 1-3 nights, sometimes longer.
- **Details**: Homestays are typically a trip to stay with a local community, or more than one community, for one or more nights, and get involved with community-led activities, such as cooking, handicrafts, animal husbandry, harvesting, festivals, and other celebrations/rituals. Also includes visits to wildlife and nature conservancy projects, such as in safari lodges/camps run by communities for nature/community-based tourism in private reserves and parks. Accommodation is provided in Homestays in a family home or in purpose-built accommodation in the community.
- **Typical Providers**: Usually supported by local ground operators or NGOs, although some homestays and lodges manage their businesses and handle bookings themselves.
- **Booking**: Can be booked independently as an individual activity, or pre-booked as part of a longer trip.

3. Tour of Multi-CBT Experiences

- **Duration**: 1-2 weeks.
- **Details**: Holiday trips are usually pre-booked, and may or may not be guided, extending over one or two weeks in Africa, and typically involve elements of CBT within a wider trip. An example includes a hiking holiday in Atlas Mountains, staying overnight with local families/communities en route, enjoying traditional food and becoming immersed in the local culture. At either end of the holiday, it is likely that participants will stay in hotels and take part in other activities that are not considered to be CBT.
- **Typical Providers**: Holidays arranged by inbound or in-country tour operators; supported by local ground operators or NGOs; community or network of homes within a community.
- **Booking**: Usually pre-booked as part of a longer trip.

4. CBT Volunteering Adventures

- **Duration**: Any.
- **Details**: The market for longer CBT experiences usually involves volunteering or internship projects, helping local communities to build schools or other infrastructure projects; teaching English or sport; conservation projects; or getting involved in healthcare initiatives such as malaria prevention or sexual health. Volunteering of this nature is popular amongst 'gap year' students, students taking a year off before they before they go to university, and people taking a career break between jobs. Participating in a Short CBT Experience whilst volunteering is a 'day off' activity.
- **Typical Providers**: Communities and projects identified by NGOs working in region; supported by specialist tour operators.
- **Booking**: Usually pre-booked, either directly with community or NGO or through a specialist operator.

2. Global Trends for CBT and Adventure Tourism

2.1 Size of the CBT Market in Africa

In 2017 tourist arrivals to Africa grew by 9%, more than any other continent and ahead of Europe at 8.4%. Tourist arrivals in Africa are forecasted to reach 74 million in 2018. Africa is a major global destination for Adventure Travel, and the Adventure Travel market is estimated to account for half of all leisure arrivals.[3] The CBT sector is included within the Adventure segment and it is estimated that CBT in some form is undertaken by around 20% of adventure tourists to Africa, accounting for 3.8% of all tourist arrivals to the continent.

Table 1: International Tourist Arrivals and CBT Visitors to Africa, 2018

Visitor Types to Africa	2018 (est.)	% Share of CBT	Notes:
Overnight Visitors (tourists) to Africa	74,000,000	-	i
Leisure Tourists to Africa (38%)	28,120,000	-	ii
Adventure Tourists to Africa (50% of Leisure)	14,060,000	-	iii
CBT Elements included in Adventure Trips (20%)	2,800,000	100.0%	iv
CBT Visitors segmented by CBT Type			
CBT Experiences	500,000	17.9%	iv
CBT Experiences with Accommodation (Homestays)	250,000	8.9%	iv
Tours with Multi-CBT Experiences	550,000	19.6%	iv
CBT Volunteering Adventures	1,500,000	53.6%	v

Notes: See footnote for details of sources[4]

[3] World Tourism Organization UNWTO (2018). *Tourism Barometer Volume 16*. March/April 2018 Statistical Analysis; Acorn Tourism Consulting Ltd analysis

[4] *Notes:*

i. World Tourism Organization UNWTO (2018). *Tourism Barometer Volume 16*. March/April 2018 Statistical Analysis; World Travel and Tourism Council: Travel and Economic Impact Africa 2018, March 2018 https://sp.wttc.org/-/media/files/reports/economic-impact-research/regions2018/africa2018.pdf

ii. World Tourism Organization UNWTO (2018) *Tourism Barometer Volume 16*. March/April 2018 Statistical Analysis; Acorn Tourism Consulting Ltd analysis

iii. Mintel, *Adventure Tourism in Africa 2016*; Acorn Tourism Consulting Ltd analysis

iv. Acorn Tourism Consulting Ltd *Tour Operator research in June 2018*

v. Mintel, *Volunteering in Sub-Saharan Africa 2014*

Based on a literature review into the niche markets of adventure tourism, volunteer tourism, safari tourism and volunteer tourism in Africa, along with tour operator research undertaken for this study, it can be said that:

- Half a million visitors take part in CBT Experiences in Africa currently, accounting for 17.9% of CBT experience types, and account for more than twice as many experiences as those with accommodation/homestays.
- The number of visitors participating in CBT Experiences with Accommodation (Homestays) are low as a consequence of poor quality of supply and therefore lack of demand.
- CBT Volunteering Adventures account for more than half of all CBT experiences (53.6%) in Africa, and the market is well established on the continent.

UNWTO's annual growth projections for arrivals to Africa in 2018 are between 5% and 7%,5 with more conservative longer-term growth of 5% predicted to 2023. CBT, however, is expected to grow more rapidly, between 7% and 10% annually to 2023.

Table 2: Forecasts of International Tourist Arrivals and CBT Visitors to Africa, 2023

Visitor Types to Africa	2018 (est)	2023 Forecast Scenarios		Notes:
		Forecast Growth Rate: 5%	Forecast Growth Rate: 7%	
Overnight Visitors (Tourists) to Africa	74,000,000	77,700,000	79,180,000	i
Leisure Tourists to Africa (38%)	28,120,000	29,526,000	30,088,400	ii
Adventure Tourists to Africa (50% of Leisure)	14,060,000	14,763,000	15,044,200	iii
CBT Elements included in Adventure Trips (20%)	2,800,000	2,940,000	2,996,000	iv
CBT Visitors segmented by CBT Type		**Forecast Growth Rate: 7%**	**Forecast Growth Rate: 10%**	
CBT Experiences	500,000	535,000	550,000	iv, vi
CBT Experiences with Accommodation (Homestays)	250,000	267,000	275,000	iv, vi
Tours with Multi-CBT Experiences	550,000	588,500	605,000	iv, vi
CBT Volunteering Adventures	1,500,000	1,605,000	1,650,000	v, vi

Notes: See below for sources cited[6]

[5] World Tourism Organization UNWTO (2018). *Tourism Barometer Volume 16*. March/April 2018 Statistical Analysis

[6] World Tourism Organization UNWTO (2018). *Tourism Barometer Volume 16*. March/April 2018 Statistical Analysis
World Travel and Tourism Council: Travel and Economic Impact Africa 2018, March 2018
https://sp.wttc.org/-/media/files/reports/economic-impact-research/regions2018/africa2018.pdf

i. World Tourism Organization UNWTO (2018). *Tourism Barometer Volume 16*. March/April 2018 Statistical Analysis; Acorn Tourism Consulting Ltd analysis

ii. World Tourism Organization UNWTO (2018) *Tourism Barometer Volume 16*. March/April 2018 Statistical Analysis; Acorn Tourism Consulting Ltd analysis

iii. Mintel, *Adventure Tourism in Africa 2016*; Mintel, *Volunteering in Sub-Saharan Africa 2014*

iv. Acorn Tourism Consulting Ltd, *Primary research with Tour Operators in June 2018*

v. Mintel, *Volunteering in Sub-Saharan Africa 2014*

2.2 Global Trends for CBT and Adventure Tourism

Globally, the trend for authentic experiences is growing, with 'authenticity' and 'discovering a different way of life' being key features that CBT participants are keen to experience. More and more tourists seek to immerse themselves in local cultures and environments to generate a greater understanding of the destination and the culture. As a result, CBT is considered as part of the adventure tourism niche, one of the fastest growing and most rapidly evolving travel niches in the world today.

In the face of global challenges that include climate change, political upheavals, natural disasters and terrorism, the sector is continuing to show high levels of resilience, and according to US-based Adventure Travel Trade Association (ATTA), which conducts research on the global adventure travel market, the global value of the adventure travel market was 'conservatively' estimated to be US$683 million in 2017, registering a 21% CAGR since 2012.[7] However, a study published by Allied Market Research estimated the global adventure market was worth US$445 billion in 2016 and projected the market would reach US$1,336 billion by 2023, registering a CAGR of 17.4% from 2017 to 2023.[8] Consequently, opportunities in the adventure travel sector remain buoyant as the trend for authentic, unique experiences is set to continue its growth trajectory.

In the UK market, the number one trend in the *Association of British Tour Agencies' Travel Trends Report 2018* saw 'Responsible Tourism' taking the top spot, with research revealing that almost 70% of respondents believe that travel companies should ensure their holidays help the local economy. Public awareness has been rapidly increasing over issues that include human rights, working conditions and environmental impact, which has had a direct impact on the profile of CBT.

As adventure travel continues to grow, ATTA's *Travel Trends to Watch in 2018* identified a number of experience and product trends that would have a positive impact on international experiential travel:

- **Being local as the ultimate adventure***:* as adventure travelers become more discerning, they increasingly seek to experience their choice of destination as 'temporary locals', seeking a personal connection to a shared experience based on interest, relations and authenticity. Food and culinary adventures offer exceptionally strong bonding experiences and authentic connections with a destination and the residents.
- As the desire for 'experiences' increases, research has uncovered that participants are also actively motivated by a desire for personal growth and learning. Consequently, tour operators are focusing closely on incorporating more elements within a trip to deliver the motivating factors required. CBT falls directly into this arena.

Adventure travel booking platform TrekkSoft concurred that 'Experiences' were the number one travel trend in its *2018 Travel Trend Report*, highlighting that at the heart of the guest experience is the *experience* itself.

The growth in demand for adventure and experiential travel is driving demand for CBT experiences.

2.3 Online Supply of CBT Products

There are no published statistics on international visitor demand for CBT. Therefore, analysis has focused on the available supply of CBT products to identify the regions where CBT is attracting most visitors.

There are three large online travel agents (OTAs) that specialize in selling 'responsible tourism' and CBT products including Responsible Travel, which was established in 2001 and is the largest global online aggregator of responsible

[7] Adventure Travel Trade Association and the George Washington University (2013). *Adventure Tourism Market Study 2013*.

[8] Doshi, Y & Das, D (2018). *Global Adventure Tourism Market Opportunities and Forecasts 2017-2023*; Allied Market Research. Retrieved from https://www.alliedmarketresearch.com/adventure-tourism-market

The growth in demand for adventure and experiential travel is driving demand for CBT experiences.

tourism holidays with sites in the UK and USA. Lokaltravel.org and Visit.org are US-based sites that offer lodging, short experiences and multi-day trips.

An analysis of the CBT products offered by these specialist OTAs identified that the market is strongest in Central and South America (with a 43.4% share of products offered), followed by Asia (25.3%). By contrast, African products only accounted for 12.9%.

Table 3: Analysis of CBT Experiences Offered by Specialist Responsible Tourism OTAs, 2018[9]

Continent	Responsible Travel	Lokal Travel	Visit.org	All Experiences	% Share
Central/South America	46	223	281	550	43.4%
Asia	119	55	147	321	25.3%
Europe	16	5	209	230	18.1%
Africa	101	4	58	163	12.9%
Australasia	3	0	1	4	0.3%

Source: Responsible Travel, Lokal Travel, Visit.org

Based on the products sold by these specialist OTAs, CBT products in Asia are most widely available in India, Cambodia, Thailand and Vietnam.

In Central and South America, Peru offers the most CBT products, followed by Mexico, Colombia, Brazil and Costa Rica.

In Africa, Morocco and South Africa are the two countries that currently offer the most CBT products, which are usually CBT Experiences with Accommodation (Homestays).

[9] Central/South America - Argentina, Bolivia, Brazil, Chile, Costa Rica, Cuba, Ecuador, Guatemala, Jamaica, Mexico; Nicaragua, Peru; Asia - Cambodia, India, Indonesia, Japan, Laos; Maldives, Mongolia, Nepal, Philippines, Sri Lanka, Thailand, Vietnam; Europe - Armenia, Bosnia-Herzegovina, Croatia, Estonia, Finland, France, Georgia, Greece, Greenland, Iceland, Italy, Latvia, Norway, Portugal, Russia, Scotland, Slovenia, Spain, Sweden, Turkey; Africa - Ethiopia, Kenya, Lesotho, Morocco, Rwanda, South Africa, Tanzania, Zambia; Australasia - Australia, New Zealand

2.4 CBT Products in Africa

2.4.1 Established and Emerging Destinations

There is very limited data on CBT in established and emerging African destinations. CBT Experiences with Homestay Accommodation are present in Morocco and South Africa, Africa's two leading countries for inbound visitor arrivals, although numbers are far fewer than in Asia or the Americas.

CBT products are more limited in developing tourism destinations such as Ethiopia, Senegal, and Zambia. Where there is less alternative visitor accommodation available, CBT products are emerging.

Recent research conducted to identify the CBT products offered in Ethiopia, Senegal, and Zambia by European tour operators, showed that homestay, village or camping accommodation was used most frequently in Zambia (accounting for around 40% of the nights offered on tours). This number was more than double the amount used in Senegal (19%) and Ethiopia (15%). However, the accommodation offered in Zambia involved limited interaction with local communities, and Ethiopia offered the highest proportion of immersive CBT experiences.[10]

2.4.2 Differentiation of CBT in Africa

Based on Acorn's research, the market for CBT in Africa is largely driven by the volunteer and conservation sectors, and CBT Volunteering Adventures account for more than half of all CBT on the continent (53.6%).

CBT Volunteering Adventures

The current market is largely based around CBT Volunteer Adventures which encompasses both volunteering and internships. The sector is well established and has some presence in the majority of African countries. In 2015, Mintel estimated the global market for volunteering to be worth US$5 billion with 4 million participants, and among international adventure tour operators, more than half (55%) offered volunteer trips within their portfolio of itineraries.

Nature-based and Conservation-driven Tourism

Safari-based CBT is a distinct niche within the broader CBT segment that is typically African. Conservation continues to be a pressing issue, and tourism has become an important way to support long-term sustainability of African wildlife and its habitats while providing economic opportunities for local people. Communities who live within reserves and wildlife areas work closely with local organizations (either commercial operators or NGOs) to manage the environment sustainably (habitats and wildlife) through tourism (full-service lodges, game drives, and other tourism activities), and the communities benefit directly from tourism income in a multitude of ways that include economic, employment, training, and empowerment.

There are a range of safari-based CBT products in East and Southern Africa, and countries like Botswana, Tanzania and Zimbabwe offer a variety of 'high-value, low-density' (HVLD) tourism products that have a direct benefit to local communities. HVLD tourism, as a formula, is being increasingly adopted in other safari regions, with the emphasis on benefits to local communities. This conservation-driven tourism gives Africa a competitive edge.

2.4.3 Lack of Awareness

There is low awareness of CBT in Africa, particularly Short CBT Experiences with or without Accommodation (Homestays). The CBT experiences available in Asia and Europe are well-covered by travel influencers, prominent bloggers and digital content creators who play a key role in informing travel decisions today. Specialist CBT operators to Asia and Central and South America feature a large range of CBT products.

[10] Acorn Tourism Consulting Ltd analysis

However, by contrast, CBT as a broader sector is largely undeveloped in Africa beyond CBT Volunteer Adventures, which are well established. An analysis of more than 500,000 English language travel blogs[11] showed that there is virtually no coverage of CBT products in Africa by travel influencers.

2.5 Concluding Comments

Although awareness of CBT in Africa is low, there is a range of CBT experiences on the continent beyond volunteering adventures, particularly in the fields of nature and conservation-based CBT in East and Southern Africa, and emerging destinations are playing an important role in growing supply and generating market demand.

[11] Blogs published on www.blogilicious.com

3. Market Characteristics

3.1 Key Source Markets

As shown in Section 2, the CBT niche segment is closely aligned with the adventure tourism market, and consequently the characteristics of this segment can be used to profile the CBT market.

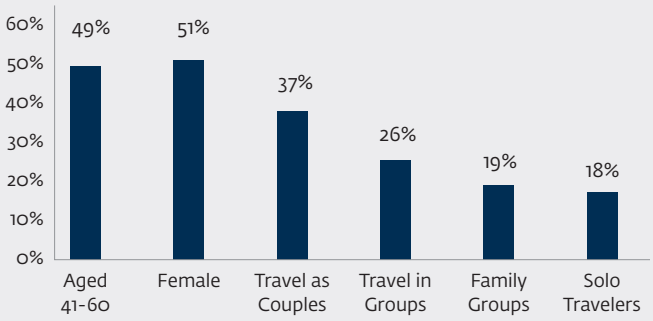
Europe and North America are the primary source markets by volume for adventure tourism, and the top nations for adventure tourists include:

- Europe - UK, Germany, France, Netherlands. Secondary countries include Scandinavia, Italy, and Belgium.[12]
- North America - USA[13] and Canada.
- Adventure tourists also originate from Australia, New Zealand, and South Africa.

3.2 Profile of Adventure Tourists

According to ATTA, 49% of adventure tourists are aged between 41-60, with an average age of 47; a further 20% are aged between 20-39. Adventure tourists are slightly more likely to be female (51%) and many travel as couples (37%) and in groups (26%). Solo travelers and families account for 18% and 19% respectively. Adventure tourists are generally well-educated and affluent.

Table 4: Profile of Adventure Tourists, 2018



Source: Adventure Travel Trends Snapshot, March 2017; ATTA

3.3 Demographics of Adventure Tourists

Mintel's reports on travel in Africa (Adventure, Cross-Continental, Driving Holidays, Safaris, Volunteering) provide detailed demographics of adventure visitors to the continent, which is a useful guide to the demographics for CBT tourists.

Baby Boomers and the 65+

Born between 1946 and 1964 (aged between 54 and 72 in 2018) Boomers have dominated the mainstream traveling population for decades. They are a wealthy and discerning group of travelers numbering around 71 million in the USA and are choosing to remain active as they age and seek new and authentic experiences. In an aging era, the world's older population is set to continue to outpace that of the younger population over the next 35 years. Credit card company Visa estimates that by 2025, travelers over 65 will represent one out of every eight international departures, and this generation will continue to travel into their retirement as adventurous, wealthy tourists focused on adventure combined with comfort.[14] Therefore, Boomers are a key target group for CBT in Africa.

Generation X

The world's third-largest consumer group at around 66 million in the USA, Gen Xers (born between 1965 and 1980) wield considerable spending power, as they are still working full-time and spend more money on travel compared with their younger and older counterparts. Family life is very much a priority for this group of consumers, and therefore budgets are tighter and travel patterns often line up with the school year. This group is another core group for CBT experiences.

Millennials

The Millennials, born between 1981 and 1996, are the world's largest consumer group numbering around 2 billion worldwide, with 74 million in the US, according to the U.S. Census Bureau.

[12] Centre for the Promotion of Imports from Developing Countries CBI Ministry of Tourism Affairs, the Netherlands (2018) *What is the demand for tourism services in developing countries?* Retrieved from https://www.cbi.eu/market-information/tourism/trade-statistics/

[13] Adventure Travel Trade Association (2017). *Adventure Travel Trends Snapshot*, March 2017.

[14] Visa (2016) 'UK households set to spend £63.4 billion on international travel by 2025.' Retrieved from https://www.visa.co.uk/newsroom/uk-households-set-to-spend-ps63-4-billion-on-international-travel-by-2025-1450883?returnUrl=/newsroom/listing?tag=travel

Travel is deeply important to tech-savvy Millennials who are driven by experiences as an antidote to the frantic, busy pace of their lives.

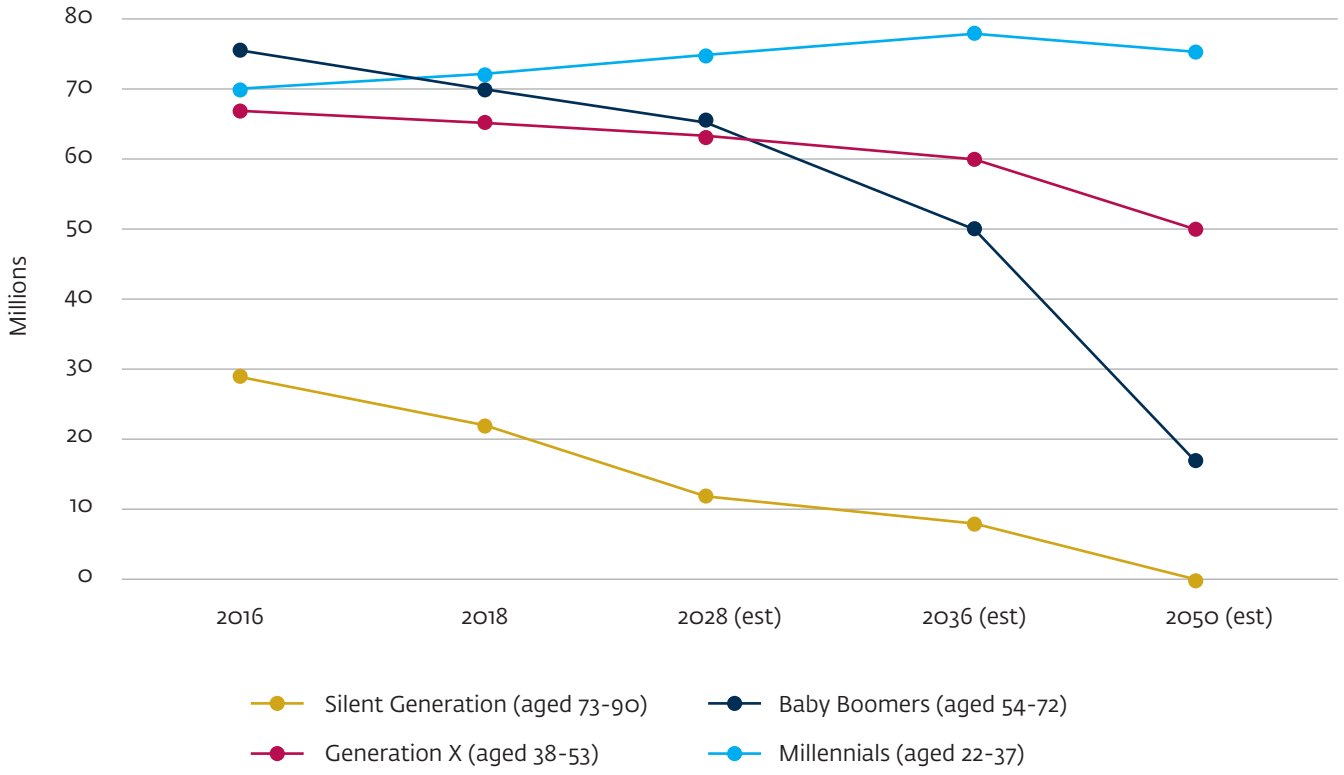
Deloitte estimates that by 2025, Millennials will comprise three-quarters of the global workforce.[15] Driven by social networking, Millennials rely heavily on word-of-mouth in their decision-making processes and are driving the online travel market. According to Allied Market Research, the Millennial market is estimated to be worth US$1.1 billion by 2022, registering a CAGR of 11.1% between 2016 and 2022.

They are a core target group for CBT, as travel is deeply important to tech-savvy Millennials who are driven by experiences as an antidote to the frantic, busy pace of their lives. As they place a premium on experiences, they seek value for money that extends beyond merely cheap travel. They look for something new when they travel: more adventurous, more local and more personal, demanding exhilarating activities to satisfy their quest for personal fulfilment and new experiences. Younger Millennials are likely to be the core consumer group for CBT Volunteering Adventures to Africa, particularly those who take a 'Gap Year' between school and university, or a break before employment, and have the time for a lengthier experience on the African continent.

Analysis of the US population by consumer group shows how demographics will shift over time as the population ages and according to Pew Research, a US-based market research institute, Baby Boomers reached their peak in 1999 at 78.8 million. Millennials are forecast to peak in 2036 at 76.2 million and Gen Xers, currently at their peak of 66 million, are predicted to outnumber Boomers by 2028 when there will be 64.6 million Gen Xers and 63.7 million Boomers.

[15] Deloitte (2014) *Big demands and high expectations The Deloitte Millennial Survey Deloitte Millennial Survey*. Retrieved from https://www2.deloitte.com/content/dam/Deloitte/global/Documents/About-Deloitte/gx-dttl-2014-millennial-survey-report.pdf

Table 5: US Population by Consumer Group, 2016 to 2050



Source: Fry, R (2018) Millennials projected to overtake Baby Boomers as America's largest generation, March 2018; Pew Research Center

3.4 CBT Adventure Tourists

Global CBT adventure tourists share many of the characteristics of a broader adventure tourist, but a key motivation is the 'feel good' factor of an immersive cultural experience and 'making a difference' to local lives. Consequently, CBT adventure tourists span the three major demographic groups of Baby Boomers, Gen Xers, and Millennials, and can be categorized further by their spending power and time to travel.

Time Rich/Cash Rich: Seeking a Unique Experience

- **Age**: 50+.
- **Demographic**: Largest traveling group on account of having time and money. They are well-educated, travel frequently, have a good budget for travel and often like to combine authenticity with luxury.
- **Life Phase**: Empty nesters, moving into retirement or retired.
- **Travel Style**: Couples; may also travel in small groups.
- **Key Motivation**: Authenticity; prepared to pay for a unique experience; 'trip of a lifetime'; affluent, therefore pricing is not an issue.
- **CBT**: Key group for CBT Short Experiences without/ with Accommodation (Homestays); Holidays with a CBT Element.
- **Trip Duration**: 2-4 weeks.

Cash Rich/Time Poor: Desire for Authenticity and to Give Back to the Community

- **Age**: 30-49.
- **Demographic**: Well-educated, well-traveled. In full-time employment, work commitments mean disposable income is more limited.
- **Travel Style**: Couples or family groups with young or school-age children.[16]
- **Key Motivation**: Authenticity, but price is an issue; keen to 'see how other people live' and 'give something back'.
- **CBT**: Key group for CBT Short Experiences without/ with Accommodation (Homestays); Holidays with a CBT Element.
- **Trip Duration**: 1-2 weeks.

Time Rich/Cash Poor: Personal Fulfilment, Supporting Communities, Volunteering

- **Age**: 18-30.
- **Demographic**: Well-educated, budget for travel limited
- **Life Phase**: Gap year students, taking a break between jobs, retired, traveling for Scientific, Academic, Volunteering or Educational purposes: (S.A.V.E.) tourists.
- **Travel Style**: Solo or with groups.
- **Key Motivation**: learn new things, personal development.
- **CBT**: Key group for CBT Volunteering Adventures.
- **Trip Duration**: Any.

3.5 CBT as Soft or Hard Adventurers

Adventure tourism is often segmented by the nature of activity involved in an adventure trip according to 'soft' or 'hard' adventure. Hard adventure requires a significant level of fitness and skill, often demands specialist equipment and can involve a high level of personal risk; examples include mountaineering, canyoning and high adrenaline sports such as paragliding. By contrast, soft adventure is less physically demanding and deemed low personal risk, such as hiking, bird watching, and CBT.

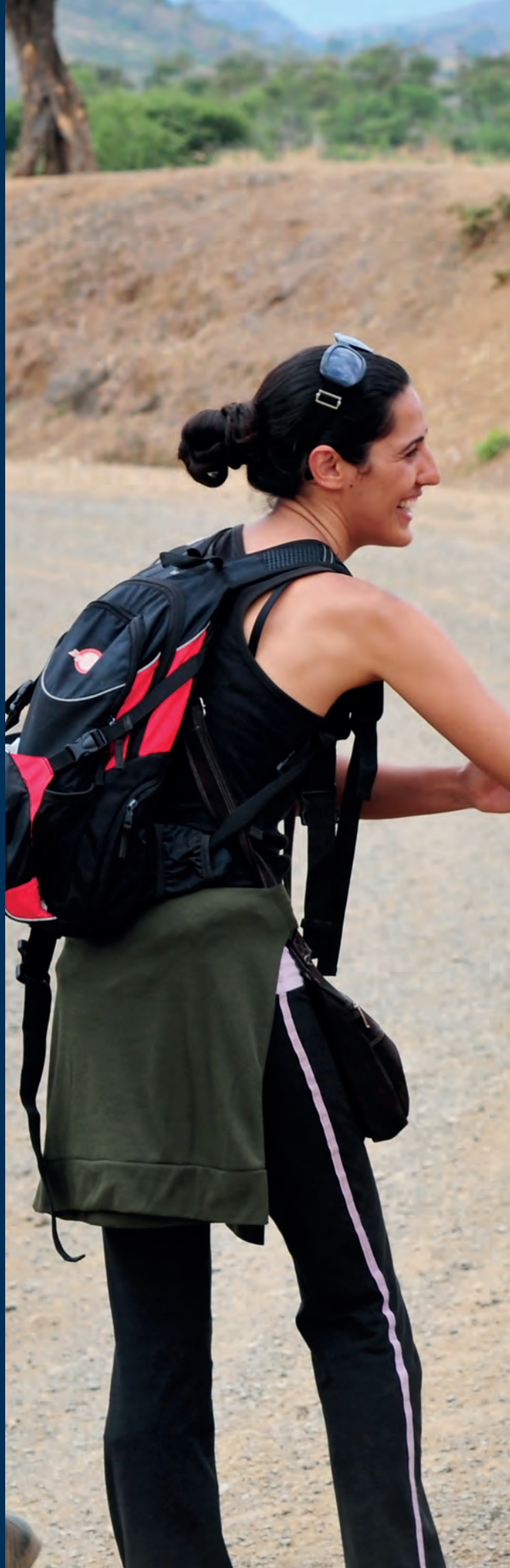
Hard adventure is estimated to account only for 10-15% of adventure travel and soft adventure, therefore dominates the adventure tourism market by a considerable margin on account it is low risk and more accessible to travelers of all fitness levels, and therefore attracts a larger customer base.

[16] Families are a key target market for CBT globally but in Africa the market is more problematic on account of safety and health concerns. Nevertheless, there are opportunities to attract the family market in destinations where the two issues are perceived to be less important, for example South Africa.

Consequently, while both markets are growing strongly, the soft adventure market was forecast to grow by 17.8% between 2017 and 2023, according to Allied Market Research.[17]

With this knowledge and based on the level of interest in CBT, the CBT tourist can be further segmented by their interest in hard and soft adventure activities:[18]

- Hard CBT Adventure requires the ultimate authenticity, a genuine cultural experience and to live as locally as possible with no luxuries. They are likely to be driven by additional activities, such as mountaineering or long-distance trekking.
- Soft CBT Adventure accounts for the largest group and the one with the most potential for growth. They also desire authenticity, but require relatively easy access to CBT product, comfort, cleanliness, and some facilities. Soft CBT Adventure is predominant amongst the Time Rich/Cash Rich consumer who are driven by the desire for a unique experience.



[17] Doshi, Y & Das, D (2018). *Global Adventure Tourism Market Opportunities and Forecasts 2017-2023*; Allied Market Research. Retrieved from https://www.alliedmarketresearch.com/adventure-tourism-market

[18] Centre for the Promotion of Imports from Developing Countries CBI Ministry of Foreign Affairs, the Netherlands (2018). What are the opportunities for community-based tourism from Europe? Retrieved from https://www.cbi.eu/market-information/tourism/community-based-tourism/community-based-tourism-europe/

4. Traveling Characteristics

4.1 Travel Groups

Research with tour operators revealed that typical travel groups for CBT experiences are Fully Independent Tourists (FIT), small groups and S.A.V.E. travel groups. The profile and demographics of the types of CBT Adventure Tourists outlined in Section 3.4 above span each of the following three travel groups:

Fully Independent Tourists (FIT)

This group makes all their own travel arrangements and books trips directly with local tour operators on the ground or with communities they found themselves. An authentic experience is essential, and backpackers are common in this travel group. Composition is either as individual travelers or in couples.

Small Groups

This type of traveler commonly uses a specialist tour operator, either booking a pre-organized trip off-the-shelf or tailor-makes a trip around specific needs. A trip is likely to be for a broader purpose than just CBT but include one or more CBT elements. Group composition includes couples, family groups, and groups of friends.

S.A.V.E. Travel Groups

This group is comprised of individuals that are traveling for Scientific, Academic, Volunteering or Educational purposes, to volunteer or undertake an internship for a set period. Group composition includes individuals, but could also include corporate groups for team building, or groups of university or other students taking part in activities as part of their courses.

4.2 Travel Experiences and Market Segmentation

The different types of CBT experiences appeal to different market segments. In the Table below, the target travel groups have been segmented, breaking out Families and Couples as subgroups of Small Groups, to indicate which CBT experience is most likely to attract them.

Table 6: CBT Experiences by Market Segment

CBT Product	Small Groups	Of which, sub-groups:		S.A.V.E.
		Families	Couples	
CBT Experiences	✓	✓	✓	✓
CBT Experiences with Accommodation	✓		✓	
Tour of Multi-CBT Experiences	✓	✓	✓	
CBT Volunteering Adventures				✓

Source: Acorn Tourism Consulting Ltd

It is evident that the CBT Experiences product appeal to the broadest market and has the potential to drive the growth of CBT in Africa.

4.3 Duration of Trip

Most trips with a CBT element last for one to two weeks as holiday patterns in the USA and Europe are generally established around holiday entitlement. American tourists have a shorter holiday entitlement, usually around 15 days a year, while Europeans are typically entitled to more annual holiday, around 25 days every year. However, with a large CBT customer base of retirees, tour operators report that trips with a CBT element that extend beyond 15 days are increasingly common.

Those on a CBT Volunteering Adventure are usually less time-constrained, and trips can last from one or two weeks to several months or a year.

4.4 Mode of Transport and Multi-destination Travel

For guided trips, tour operators typically arrange and facilitate the mode of transport for their clients.

Independent (FIT) visitors make their own travel arrangements (air, self-drive, public transport) and ease of access to a CBT location will play its part in selection. If located on a well-traveled route in the country such as the Garden Route in South Africa, or a published trekking route in Ethiopia's Simien Mountains, or Mount Kilimanjaro in Tanzania, the visitor can choose between the type of available accommodation and associated CBT experience they purchase.

However, when developing CBT experiences, careful thought about the time it takes to reach the communities from likely starting points should be considered; around 4 hours is considered the upper limits of traveling time, according to tour operators.

Many operators offer multi-destination trips that span across African countries. An assessment of operators' popular itineraries that include more than one country could identify potentially suitable locations for CBT products. However, as a huge continent with limited intercontinental airlift, traveling between countries can be lengthy, and crossing borders is often a time-consuming process, which can be a barrier to multi-destination travel. Nevertheless, it is reasonably common to drive through two or more countries on a self-drive holiday, particularly between southern African countries of South Africa, Namibia, and Botswana.

In East Africa, the open-visa scheme introduced to encourage intra-African tourism visits between Kenya, Uganda and Rwanda has encouraged more cross-border arrivals between all countries. Kenya's Ministry of Tourism reported that, from 2015-2017, visitor arrivals from other nations had grown significantly, stimulated by the visa scheme. For example, arrivals from Uganda were up by 20.6% in 2017.

Other countries have adopted similar visa-free systems to stimulate visitor arrivals, including Namibia, Ghana, Nigeria, and Benin. The African Continental Passport was launched in 2016 with the aim of enabling visa-free travel for all African citizens across the continent by 2020.

As travel between countries in Africa becomes easier, for both regional and international visitors, the demand for a wider variety of accommodation can be expected to grow.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5. Trip Practicalities: Planning and Booking

5.1 Travel Research and Planning

The Internet is a key research tool for CBT tourists who are increasingly researching and planning their trips online, gathering information on and sharing their travel experiences using sites including:

- Peer-review sites, e.g. TripAdvisor;
- Influencer and travel blog sites;
- Travel holiday portals, e.g. Responsible Travel, Lokal Travel, Visit.org; and
- Social Media platforms, e.g. Instagram, YouTube, Facebook.

5.2 Booking CBT Products

Tour operators report that the North American market is more likely than the European market to use a tour operator to plan and arrange the whole trip, and that CBT is typically only one element of a pre-booked trip. However, some clients are keen on booking their own CBT experience once in the country, when they have the opportunity to find out for themselves what is available.

CBT Experiences/CBT Experiences with Accommodation (Homestays)

Independent travelers usually book this type of experience via a local operator on the ground that works directly with communities. There are also a number of online platforms for experiences such as Visit.org and Lokaltravel.com. For those on package holidays, the tour operator typically makes the arrangements; consequently, relationships between local ground operators and inbound operators are important.

Tour of Multi-CBT Experiences

Inbound tour operators liaise directly with local ground operators, destination management companies (DMCs) and accommodation providers. Many operators providing this type of holiday are aimed at the high-end, small-group market, and there are multiple operators in the USA, UK and Europe, which cater to the adventure tourism market.

CBT Volunteering Adventures

A range of specialist tour operators coordinate CBT Volunteering Adventures for volunteers and/or interns, making all necessary arrangements including travel, visas, accommodation, and local transport. The market for tour operators is strong in the UK as the 'gap year' culture has endured for many decades, and in 2013 the gap year market was estimated to be worth US$480 million annually.[19] Globally there are many not-for-profit organizations that supply volunteers every year to Africa, such as VSO and Frontier in the UK and the Peace Corps in the USA, as well as commercial operators including Gap360, The Leap and Gapforce.

[19] Mintel (2014). *Volunteering in Sub-Saharan Africa, May 2014*.

The quest for authentic experience is an increasingly important trend recognized by the tourist industry worldwide.

6. Expectations and Motivations

6.1 Travelling to Africa

As one of the world's most challenging destinations for travel, Africa is a destination highly favored by the adventure traveler, no matter what the primary purpose of travel might be (CBT, safari, multi-activity). As the market has grown and evolved, tourists' motivations for adventure travel have become more important and are now vital considerations for the tourism sector. The quest for authentic experience is an increasingly important trend recognized by the tourist industry worldwide, regardless of destination or type of trip.

6.2 Motivations of the CBT Tourist to Africa

Most, if not all, involvement in CBT activities in Africa are motivated by the desire to enjoy an immersive, cultural experience alongside the desire to help, knowing that the money spent on CBT will reach the community. Participants are also keen to 'see how other people live', knowing that their own lives are likely to be very different, but also to take part in activities in a hands-on way, not just be an observer. While CBT tourists are prepared to travel between 4-6 hours to visit a community for a CBT experience, particularly those seeking a truly authentic, 'off the beaten track' experience, product that is situated close to an existing tourist sight is likely to benefit from increased visitor interest.

6.3 Expectations from CBT Experiences

Authenticity is key to the success of a CBT experience for all types of CBT visitors, which creates and fulfills the expectation that the visitor will have a one-of-a-kind experience, is the primary factor in choosing a CBT tourism product. For the visitor, feeling truly immersed into a different culture and believing that they are making a real difference is the essence of a successful CBT experience. Visitors also want to be assured that they are not disrupting community life, disturbing privacy, or offending local culture and customs.[20]

In addition to authenticity, the quality of the experience is paramount. Accommodation must be of a good standard, and a high level of cleanliness is essential, especially when it comes to food safety. All visitor types require this. Basic facilities are acceptable, but beds should have a mattress with bed linen and towels. It is acceptable for facilities to be simple, such as a 'hole in the ground' toilet and a bucket of water for a shower. This level of basic living is considered part of the experience, and so long as it's safe, clean and the food is safe for international visitors to consume, it contributes to the success of the experience.

For those on high-end guided holidays, standards of accommodation and facilities need to be higher, such as proper bathroom facilities and purpose-built accommodation or lodges, but the principles of authenticity and hands-on involvement remain the same.

[20] Acorn Tourism Consulting Ltd research

7. Expenditure, Price Issues and Length of Stay

7.1 Adventure Tourism Trips

ATTA's research with adventure tour operators reveals that adventure tourism is a lucrative sector attracting high-value customers with an average spend per trip of US$3,000 and have an average trip length ranging on average from seven days (Europe/North America/South America) to nine days (Africa).[21]

Adventure tourism is also proving profitable for destinations with tour operators estimating that 65% of the per guest trip spend remains in the local region, further estimating a per guest spend of US$145 on local handicrafts or souvenirs.

7.2 Spending Characteristics of Market Segments

As a sub-segment of adventure tourism, CBT tourists can be relatively high-spend visitors although price sensitivity varies between the different market segments and is driven by perceived value.

Time Rich/Cash Rich - Seeking a Unique Experience

- As affluent Baby Boomers and Gen X'ers, this group have a good budget for travel and are less sensitive to pricing. They are prepared to pay more for a unique experience and will be guided by the experience on offer, rather than the price.
- Predominantly couples. May also travel in small groups or with families.
- Key group for CBT Short Experiences without/with Accommodation (Homestays); Holidays with a CBT Element; traveling for 2-4 weeks.
- Likely Average Daily Spend: US$250+.

Cash Rich/Time Poor - Desire for Authenticity and to Give Back to the Community

- Younger Gen Xers in full-time employment, often with families and/or other commitments means they enjoy less disposable income for travel.
- Couples or Family groups with young or school age children.
- Key group for CBT Short Experiences without/with Accommodation (Homestays); Holidays with a CBT Element.
- Likely Average Daily Spend: US$100-250.

Time Rich/Cash Poor - Personal Fulfilment, Supporting Communities and Volunteering

- Millennials, typically at the start of the work careers or embarking on a career break. Disposable income is limited, they seek a value product that extends beyond merely cheap.
- S.A.V.E. or CBT Volunteer Adventures.
- Likely Average Daily Spend: up to US$100.

Bearing in mind how general behaviors differ across the market segments outlined above, the research has uncovered that CBT tourists across all income brackets are often prepared to pay more for unusual and exclusive activities, with some willing to spend a lot for extraordinary and remote experiences, for example:

- Annually 2,000 people take a trip to Transfrontier Parks in the Kalahari and pay UK£500 per person per night for a trip to a remote desert area, 720km from the nearest airport.
- Boomers are looking for an exceptional, unique trip and are prepared to pay for it, e.g. US$100-200 per night for an eco lodge that includes CBT activities; US$100 per day for CBT day trips based on Lokal Travel prices.

Tour operators have stated that initially, upon inquiry, clients can be surprised at the relatively high prices of a CBT experience. However, once the concept has been explained and clients understand the community receives a high percentage, they are happy to pay.

[21] ATTA (2017). *Adventure Travel Trends Snapshot 2017*.

7.3 Pricing of CBT Product on the Market

There are no standard pricing structures for CBT product; the table below gives an indication of the full and diverse range of product and prices currently on the market.

Table 7: CBT Product and Pricing

CBT Product	Country	Guide Price
CBT Experiences		
Real City Tour (3.5 hours)	South Africa	UK£3.50 pp
Traditional Cooking Class (2.5 hours)	Rwanda	US$23 pp
Discovery Tour (2 hours)	Malawi	US$21 pp
Adventure Tour (1 day)	Tanzania	US$437 pp
CBT Experiences with Accommodation (Homestays)		
Rural Homestays in KwaZulu-Natal	South Africa	US$35-53 pppn
Atlas Mountains Homestay	Morocco	UK£8-24 pppn
Journey through Mountains of Tigray (3 nights)	Ethiopia	US$624 pppn
Tours of Multi-CBT Experiences		
Tailormade Ethiopia Holiday (2 weeks)	Ethiopia	£2,483
Cultural Holiday in Ghana, Togo and Benin (2 weeks)	West Africa	£2,249
Tribal Lands of Cameroon (2 weeks)	Cameroon	£2,325
Omo Valley Cultural Holiday (2 weeks)	Ethiopia	£2,395
CBT Volunteering Adventures		
Wildlife Conservation Adventure (2 weeks)	Madagascar	£945
Orphanage Volunteer in Tanzania	Tanzania	£738
Zambia Eco-Construction (6 weeks)	Zambia	£1,749
Medical Internship (8 weeks)	Ghana	£1,879

Sources: Calabash; Lokal Travel; Visit.org; Responsible Travel; Tesfa Tours; Frontier; Gap360
Notes: CBT Volunteering Adventures prices exclude international flights.

Analysis of CBT product on the market reveals that:

- Tours of Multi-CBT Experiences are the most expensive; consequently, the key markets are the Time Rich/Cash Rich consumers and to a more limited extent, Cash Rich/ Time Poor.
- Short CBT Experiences with Accommodation offers good-value CBT product, but the lack of adequate availability shows that product is not currently meeting the needs of the Cash Rich/Time Poor segment.
- CBT Volunteering Adventures offers the Time Rich/Cash Poor segment a good range of opportunities that fit within a variety of budgets.

In conclusion, the development of more CBT Experiences with Accommodation represents a pivotal opportunity to attract the underserved Cash Rich/Time Poor segment.

7.4 Length of Stay and Duration of CBT Component

Research with tour operators offering holidays to Africa uncovered some distinct trends with regard to length of stay of holiday trips to Africa and the duration of CBT elements.

- 70-80% of leisure trips to Africa are for 7-14 days.
- The remainder of trips, those between 1-6 nights and more than 15 nights, are broadly evenly spread by 20%.
- The most popular CBT element is a half/full-day experience without accommodation.
- While the sample size was small, the operators offered insight into current tourism experiences with CBT. It was noteworthy that the operators reported that around 50% of their clients requested CBT as part of the trip. Nevertheless, this figure should be treated with caution.

Increasing the supply of good quality CBT experiences with homestay accommodation is likely to improve the take-up of CBT experiences that last longer than a few hours.

8. Recommendations for Product Development

8.1 Key Factors for Developing CBT Product

Based on the research of tour operators and the existing CBT products, the key criteria for establishing a successful CBT product are:

- A unique experience with an emphasis on cultural immersion.
- Higher quality of accommodation.
- Ensures security and safety.
- Emphasis on cleanliness and health of international visitors
- Ease of access and proximity to markets and other attractions.
- Economies of scale.
- A discernible and actual benefit to the community.
- Sustainability of the experience.

8.2 Cultural Integrity

Authenticity is the most important factor for visitors; therefore, to meet market demand, it is essential that the CBT visitor has an insight into daily life, unique cultures and the experience of a different way of life through an overnight stay. Hands-on activities give a more immersive experience and help with a bonding experience (cooking, working with animals, harvesting, enjoying communal meals, and handicraft-making).

Consequently, communities that have distinctive tribal cultures often appeal most to tourists, as they offer an experience that is the most different to the life of the CBT tourist, e.g.

- Masai in Kenya and Tanzania.
- Berber nomadic tribes in North Africa.
- Tribes of Southern Ethiopia.
- San (Bushmen) of Southern Africa.

Urban townships or communities located on the outskirts of cities and towns can have potential for product development due to their gateway location, e.g. Cape Town, South Africa; Kigali, Rwanda. Most inbound CBT visitors from Europe and North America will arrive via major urban hubs, and some will stay a few days before heading out. This gives urban communities an opportunity to attract the CBT visitor to an experience they may not have considered.

8.3 Sustainability and Best Practice

Traditional communities, particularly those in more isolated areas, are very sensitive. NGOs working with communities where CBT has been introduced, identify the potential to create community problems such as the undermining of community values; jealousy between those who benefit directly and those that don't; an influx of vices such as cigarettes, alcohol and drugs; lack of respect for traditional hierarchies; and theft of valuables brought into the community by tourists (e.g. cameras, iPads).

Poorly conceived CBT development will not only have negative impacts on the community involved, but is also in danger of destroying the product that creates the market appeal. Establishing any CBT needs to be done in conjunction with local communities and be underpinned by internationally recognized sustainable best practice.

8.4 Standards that Meet Tourist Expectations

To develop CBT Experiences with Accommodation, there is a need to understand the expectations of the international CBT tourist, in particular standards for accommodation where cleanliness and private toilet facilities are the absolute minimum. There is a need for homestay accommodation to offer a reasonable level of comfort, and safety and cleanliness is paramount.

The basic standards for accommodation are:

- Beds with bed linen.
- Towels.
- Bathroom with toilet and lock.
- Food that is simple, locally produced and safe to consume.

8.5 Destinations, Location and Scale

Currently, the most popular countries for CBT Experience with Accommodation are known to be South Africa and Morocco, and there are multiple CBT Volunteer Adventure opportunities throughout the continent. There is some evidence to suggest that several African countries have plans in the pipeline to increase CBT and develop homestays. However, more detailed research will be needed to identify which countries are making significant inroads into product development strategies for CBT.

While an immersive community experience is the primary attraction, being close to a major attraction can act as a driver to the area, particularly for Short CBT Experiences with Accommodation (Homestays). Many such attractions are remote, and suitable accommodation that meets the needs of the CBT/adventure tourist is likely to increase the length of stay.

While there are some exceptions, newly establishing CBT products are therefore strongly advised to orientate their offer towards an existing demand driver. This means the development of the product should be seen in the context of the wider destination and its offer, recognizing that in most cases tourists will select the destination or location first, and then consider CBT products within it. Some examples of established routes or tourism hubs are listed below.

- Safari routes, e.g. Northern Circuit, Tanzania.
- Conservation areas, e.g. Botswana, South Africa, Namibia.
- Trekking routes, e.g. Atlas Mountains, Morocco; Mount Kilimanjaro, Tanzania; Mount Meru, Kenya; Simien Mountains, Ethiopia.
- Cultural circuits, e.g. Northern Ethiopia; West Africa (Ghana; Sierra Leone; Liberia).
- Trekking gorillas and chimpanzees, e.g. Uganda, Rwanda, DRC.
- Land-based adventure activities, e.g. Victoria Falls, Livingstone, Zambia; balloon safaris, Kenya and Tanzania; canoe (*moroko*) safaris, Botswana; Namibia (multiple high-adrenaline adventures such as dune boarding).
- Water-based adventure activities, e.g. Lake Malawi, Malawi (water sports); Quirimbas Archipelago, Mozambique (diving); Kenya (deep sea fishing).

Food tourism is one of the key trends across the world today, and culinary experiences can be effective ways to create an immersive cultural experience and drive revenues locally to farmers, cooks, and other suppliers. Consider culinary hotspots that might be suitable for developing a trail, e.g. wine production or coffee plantations in Ethiopia, and tea plantations in Kenya and Malawi.

There are many CBT experiences in deprived urban areas such as South African townships, which rely on CBT. However, a rural location is important for CBT Experiences with Accommodation (Homestays), as rural experiences offer good potential for getting involved in community activities over a longer period of time.

It is advisable to develop CBT products in an integrated way, with some scale. Much of the demand comes from groups, and this is unlikely to change in the short-medium term. Groups will need to be accommodated or provided for by enough products and services to cater to them all in one place. The development of a number of accommodation products, together with a range of services or experiences, allows for groups to stay, but also for shared resources, shared learnings between entrepreneurs and the development of a coherent brand identity around the offer.

8.6 Pricing

Pricing is a less sensitive issue than other tourism niches as CBT tourists are prepared to pay relatively high amounts for experiences and accommodation that they consider to be authentic, and that will benefit the community. However, transparency is essential combined with successful delivery of the expected experience for the CBT visitor to believe they have made a positive contribution. Comparisons with other product on the market would be a useful exercise (see Section 7.3, Table 4) to establish some broader pricing parameters by destination. Target markets, levels of service, cost of product and more, are other pricing considerations.

8.7 Conclusion

In Africa, CBT Experiences without accommodation are currently driving the market, and there is evidence to support the demand for increased authentic experiences. The high-yielding Cash Rich/Time Poor segment (which includes families) is underserved in Africa, and there is an opportunity to develop CBT products - especially more CBT Experiences with Accommodation to try to capture more of this market. This requires a shift in the types and standard of product that is currently on the market.

There is concern about the standard of homestay accommodation. CBT tourists are interested in homestay accommodation, but currently the standard of comfort, safety and particularly cleanliness, are too low for most CBT tourists. Consequently, development of the sector demands a clear understanding of market expectations of authenticity and quality, which underscore basic comfort and cleanliness.

The lack of suitable homestay supply is not meeting current demand for 'living cultural' experiences in Africa, and tour operators concur there is a demand for CBT experiences in Africa - especially around food and gastronomy, but current supply is neither numerous enough nor of a high enough standard.

To ensure the sustainability of the CBT experience and accommodation offer, the development of any CBT products will need to be done in close cooperation with the communities, using international best practice.

Consequently, successful CBT product development on the African continent will require careful attention in several key areas, which are:

- CBT Experiences with Homestay Accommodation product should be developed in reasonably close proximity to major tourist sites (4-6 hours' travel away, maximum) where cultural assets are strong and/or aligned to coincide with key tourist routes and circuits.
- Food and cooking are important cultural trends globally, and could be important growth drivers for both urban and rural CBT Experiences when executed properly.
- CBT product supply should be appropriate to appeal to the three key markets outlined in Section 3.4 and consideration to the primary needs of these markets must be met, namely authenticity, comfort, cleanliness and safety.

The success of existing CBT product and the demand for authentic experiences bodes well for the increase of CBT and the associated benefits accruing to the communities. It is hoped this research goes some way towards filling a knowledge gap across the continent and can help guide future product development in Africa, particularly in light of the market access opportunities now afforded by digital platforms. A limitation of this research has been the absence of demand data from regional and domestic markets in Africa, which are believed to represent additional and markedly different market segments for CBT products. Potential future research into this area will aim to analyze this gap. Questions and comments should be sent to tourism@worldbankgroup.org.

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