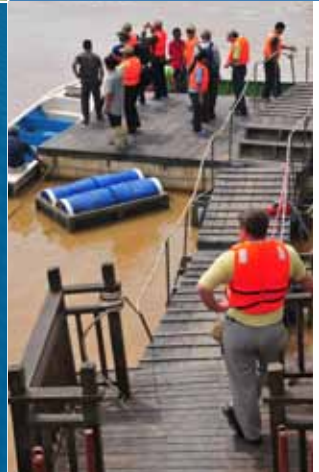




**Asia-Pacific
Economic Cooperation**

Handbook on Community Based Tourism

“How to Develop and Sustain CBT”



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**Asia-Pacific
Economic Cooperation**

Handbook on
COMMUNITY BASED TOURISM
“How to Develop and Sustain CBT”

**Amran Hamzah
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A Project Study Submitted by
MALAYSIA

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**Asia-Pacific
Economic Cooperation**

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Preface



Women participation at Misowalai Homestay

Community Based Tourism (CBT) has experienced unprecedented growth due to the increasing consumer demand for educational and participatory travel experiences. CBT is also being recognised as a tool that strengthens the ability of rural communities to manage tourism resources while having huge potentials in generating income, diversifying the local economy, preserving culture, conserving the environment and providing educational opportunities. To provide a better understanding of the long term viability of Community Based Tourism as a development tool, the study on Capacity Building on Community Based Tourism as a Vehicle for Poverty Reduction and Dispersing Economic Benefits, is commissioned and funded by the Asia Pacific Economic Cooperation (APEC). This study is undertaken by the Ministry of Tourism Malaysia (MOTOUR) in collaboration with the Tourism Planning Research Group (TPRG), Universiti Teknologi Malaysia.

The Handbook on Community Based Tourism: "How to Develop and Sustain CBT" is the main output of the study and is designed to provide guidance for tourism/rural planners, NGOs, industry players and CBT organisations in deciding whether tourism could work for a particular community and if it is feasible, how to participate in the tourism industry and sustain it over the long term. The handbook recommends a step by step approach in which each step is supported by a list of actions. Although it is recognised that one size does not fit all, this handbook can be adapted by communities at various stages of tourism development.

An important element of this handbook is the incorporation of case studies of government, NGO, industry and community initiated CBTs in ten APEC member economies namely China, Viet Nam, the Philippines, Canada, Australia, New Zealand, Chinese Taipei, Indonesia, Korea and Malaysia.

As part of the study, the International Conference on CBT was held from 20th to 23th April, 2009 in Sandakan, Sabah which was an excellent platform to disseminate knowledge and best practice on CBT as well as for getting feedback from the key stakeholders on how to improve the handbook. This handbook is intended for tourism planners and managers as well as community leaders who are directly or indirectly involved in CBT. It is hoped that the steps, actions, and checklists recommended in the handbook will be of value to these stakeholders.

Acknowledgement

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- Mr. Taufik Hidayat Udjo and Mr. Satria Yanuar Akhbar of Saung Angklung Udjo, Bandung, Indonesia.
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- Mr. Kang Ki Sook (Chairperson) of Seongeup Folk Village Preservation Committee and Mr. Sung-Bo Hong (Assistant Director) of Culture Policy Department, Jeju Island, Korea.
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- Mr. Kauahi Ngapora (CEO) and Mr. Phillipa Gill (Administration Manager) of Whale Watch, Kaikoura, New Zealand.
- Mr. Damian Britnell (CEO) and Mr. Roy Gibson (Chairperson of BBN Board of Directors) of Kuku Yalanji Dreamtime, Mossman, Australia.
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Last but not least our deepest gratitude to the government officials, community leaders, tour operators and local communities at each of the case studies for their cooperation, active participation and warm hospitality that greeted us during the field work.

**Tourism Planning Research Group
August 2009**

The ambiance at Lashihai Homestay, Lijiang, China.



BASIC GUIDE

The Approach to Community Based Tourism



Part 1

1. Introduction to Community Based Tourism
2. What is Community Based Tourism?
3. The Purpose of this Handbook
4. How To Use This Handbook



Tourists at Saung Angklung Udjo have the opportunity to learn and play simple musical notes using the Angklung during the Bamboo Afternoon Performance.

Introduction



Misowalai Homestay Committee during one of its weekly meetings

Community Based Tourism (CBT) is given emphasis in the APEC Tourism Charter that was endorsed at the first Tourism Ministerial Meeting held in Korea in 2000. Explicitly, the Charter recognises the role of tourism in improving the economic, social, environmental and cultural well-being of APEC Member Economies. Implicitly, the Charter highlights the importance of CBT through the following statements:

- an important generator of business opportunity for small and medium sized enterprises (14.d);
- an effective vehicle for dispersing economic benefits within and among economies, particularly at the provincial level (14.e);
- a catalyst for partnership between the public and private sectors (14g).

CBT has been applied in developed member economies such as Canada, New Zealand and Australia as well as developing economies like Viet Nam, Indonesia, China and Malaysia. The literature refers to numerous CBT projects in the APEC region but these are mainly one-off projects mostly initiated and operated by NGOs. APEC itself commissioned a review of CBT projects in several member economies in 1999 but

it was only aimed at identifying factors that influenced member economies to implement CBT. So far, there has been no attempt to assess the long term economic viability of CBT.

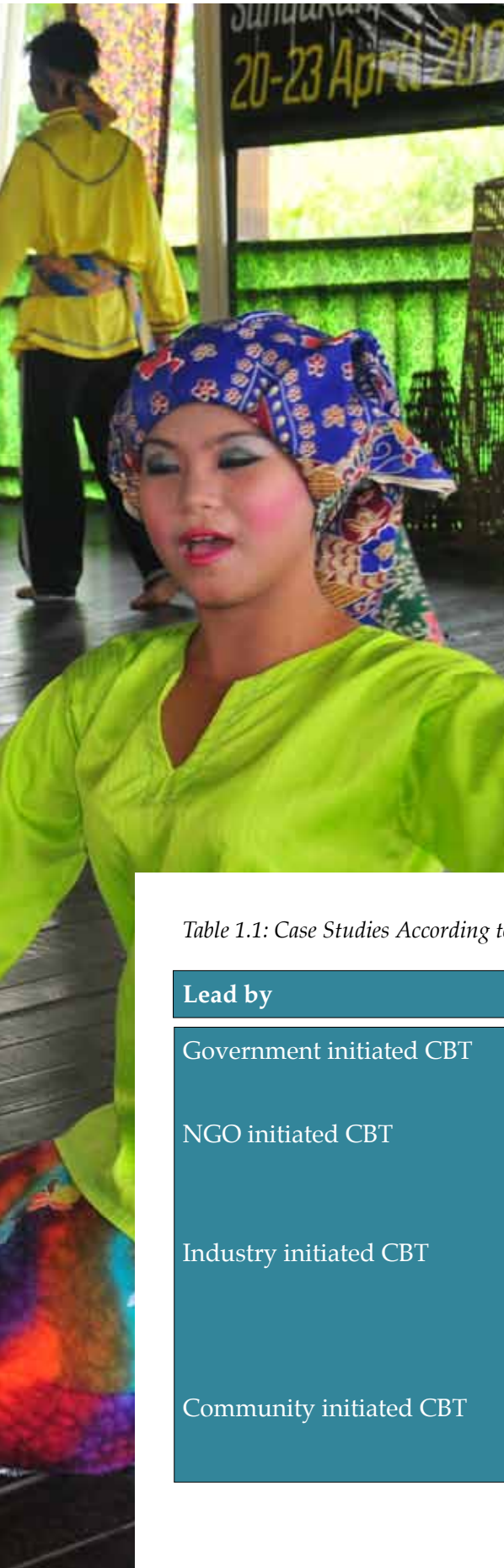
Furthermore, and in the light of the growing importance of tourism as a tool for economic regeneration, it is highly imperative that the principles and mechanisms of CBT are mainstreamed. In this light, this study will assist member economies in incorporating the CBT model as part of their formal development process (mainstreaming). By doing so, CBT will no longer be an alternative development model but a formal development tool.

This handbook is formulated based on the main findings and lessons learned from a study on Community Based Tourism that is funded by the APEC Tourism Working Group. The study on Capacity Building on Community Based Tourism as a Vehicle for Poverty Reduction and Dispersing Economic Benefits at the Local Level was carried out between November 2008 to April 2009 by the Ministry of Tourism Malaysia, in collaboration with the Tourism Planning Research Group (TPRG), Universiti Teknologi Malaysia. The aim of this study is to improve the understanding of member economies on the concepts, best practice and long term viability of CBT, based on the experience of successful CBT models in the APEC region. Case studies in 10 member economies were selected for the study, namely:-

- Australia
- Canada
- China
- Chinese Taipei
- Indonesia
- Korea
- Malaysia
- New Zealand
- The Philippines
- Viet Nam

*Right
Misowalai Homestay
cultural troupe performing
to guests at village hall*





To collect data to be used in the analysis, field work was carried out at the study sites, which employed a range of research instruments, especially face to face interviews with key stakeholders such as the CBT organisation, government officials, tour operators, NGOs and the local communities.

The case studies were selected through a screening process to reflect the socio-economic conditions of the chosen member economies. In addition, the selected case studies represent CBT projects that are initiated by government agencies, NGOs, the tourism industry and the community itself (Table 1.1).

The success factors of CBT projects in these selected member economies are then synthesised and modelled to represent the best practice from the region. Although one size does not fit all, the analysis shows that there is a commonality in the development process and life cycle of CBT projects.

Subsequently, these common threads are translated into the recommended steps for developing CBT initiatives. More importantly, the analysis also shows that once the necessary steps have been taken to start a CBT project, a different

Table 1.1: Case Studies According to Project Initiator

Lead by	Community Based Tourism
Government initiated CBT	Guisi Community Heritage Based Tourism, Guimaras, The Philippines Seongup Folk Village, Jeju Island, Korea
NGO initiated CBT	Ta Phin Village, Sapa, Viet Nam Lashihai Homestay, Lijiang, China Misowalai Homestay, Kinabatangan, Sabah, Malaysia
Industry initiated CBT	Saung Angklung Udjo, Bandung, Indonesia St. Jacobs County, Toronto, Canada Shui-Li Snake Kiln Ceramic Park, Nantou, Chinese Taipei
Community initiated CBT	Whale Watch, Kaikoura, New Zealand Kuku Yalanji Dreamtime Walk, Mossman, Australia

approach is then needed to sustain the project. As a CBT initiative matures, the adoption of a sophisticated business model is essential in weaning the project from government or donor reliance as well as to scale up the project. This is crucial in ensuring the long term economic sustainability of CBT projects. As such, the main aim of the handbook is to recommend the process of not only developing CBT initiatives, but more importantly, to sustain these initiatives.

What is Community Based Tourism?

Community based tourism (CBT) is a community development tool that strengthens the ability of rural communities to manage tourism resources while ensuring the local community's participation. CBT can help the local community in generating income, diversifying the local economy, preserving culture, conserving the environment and providing educational opportunities. As CBT may provide the local community with alternative incomes, it becomes a poverty reduction tool. CBT requires a long-term approach and aims to maximise the benefits for the local community and limit the negative impacts of tourism on the community and their environmental resources.

Community based tourism needs to be approached in a systematic manner; from studying the suitability of the community to be involved in tourism to ensuring that community members are given the opportunity

to participate in related projects, and are involved in monitoring and controlling the negative impacts. Some general characteristics of CBT that have been highlighted by UNEP and UNWTO are as follows:

- involving appreciation not only of nature, but also of indigenous cultures prevailing in natural areas, as part of the visitor experience;
- containing education and interpretation as part of the tourist offer;
- generally, but not exclusively, organised for small groups by small, specialised and locally owned businesses;
- minimising negative impacts on the natural and socio-cultural environment;
- supporting the protection of natural and cultural areas by generating economic benefits from it;
- providing alternative income and employment for local communities; and
- increasing local and visitor awareness of conservation.

As highlighted earlier, the case studies show that CBT projects go through a product lifecycle. Initially CBT projects are small scale, low density and operated by the community with the assistance from well-meaning outsiders such as NGOs. Initially, the communities are contented with the availability of jobs brought about by the CBT projects. As the CBT project matures, however, the challenges for the community also increase. Inevitably, tour operators will begin to show interest and will extend their corporation to form partnerships with the local community. Without the necessary skills and expertise to cope with the increasing number of tourist arrivals and changing tourist demand, local communities have the tendency of becoming over-reliant on

the tour operators. At the same time, CBT projects will have to move up the value chain and their long term viability will depend on how well the key stakeholders cope with new expectations.

The Purpose of this Handbook

This handbook will recommend a flexible approach to the development of CBT. It is written in simple English and tries to be user friendly in its presentation. It is meant to be used by government officers, planners, industry players and community leaders as a guide to ensure that CBT is developed in a sustainable manner. The recommendations are practical and based on best practice derived from the case studies. In addition, the recommended actions offer several options to suit the socio-economic condition of the member economy or site. Hence the recommendations are meant to be useful for communities who are on the verge of embarking on CBT projects as well as for existing projects which are experiencing either rapid growth, consolidation or an impending decline. Central to the spirit of the handbook is the aspiration to nurture the development of CBT projects to become mainstream tourism products.



Fig. 1.1: Nine Steps to Develop and Sustain CBT

How to Use This Handbook

The handbook recommends nine steps for developing and sustaining CBT, which are divided into 2 sections (Fig 1.1). The first 4 steps in **Section A** are related to starting and developing CBT initiatives, which are useful for projects and sites that are embarking on CBT. The subsequent 5 steps in **Section B** are meant to address the sustainability of CBT projects, which are more appropriate for mature CBT projects that are gradually moving up the value chain. The nine steps are presented in detailed and supported by the models developed from the case studies. For each step, a list of actions is recommended to guide the development of CBT, which is summarised in a table form at the end of each step.

At the end of each step too, there are examples of specific templates that are often used in carrying out a product inventory and training modules etc. These templates could then be adopted and adapted by community leaders and CBT managers instead of wasting time and effort in reinventing the wheel. Finally, a list of web sites related to the various facets of CBT is given at the end of each chapter. This will direct readers to the wealth of information of CBT in cyberspace.

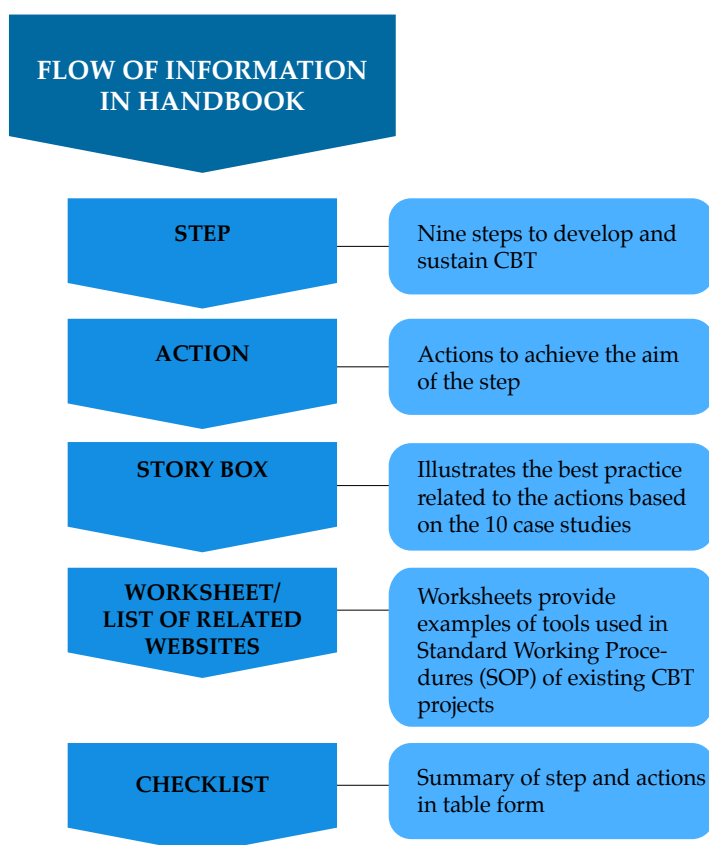


Fig. 1.2: Flow of Information in Handbook



Guests preparing for wildlife watching along Kinabatangan River, Kg. Batu Puteh

STEP BY STEP APPROACH

How to Develop and Sustain Community Based Tourism

SECTION A: How to Develop

- Step 1 - Assess Community Needs and Readiness for Tourism
- Step 2 - Educate and Prepare the Community for Tourism
- Step 3 - Identify and Establish Leadership / Local Champion
- Step 4 - Prepare and Develop Community Organisation

SECTION B: How to Sustain

- Step 5 - Develop Partnerships
- Step 6 - Adopt An Integrated Approach
- Step 7 - Plan and Design Quality Products
- Step 8 - Identify Market Demand And Develop Marketing Strategy
- Step 9 - Implement and Monitor Performance

Conclusion

Appendix

References



Part 2



Among the artefacts produced by the Kuku Yalanji community which are exhibited in their art gallery.

Assess Community Needs and Readiness for Tourism



Step 1

Section A

Step 1

Assess Community Needs and Readiness for Tourism

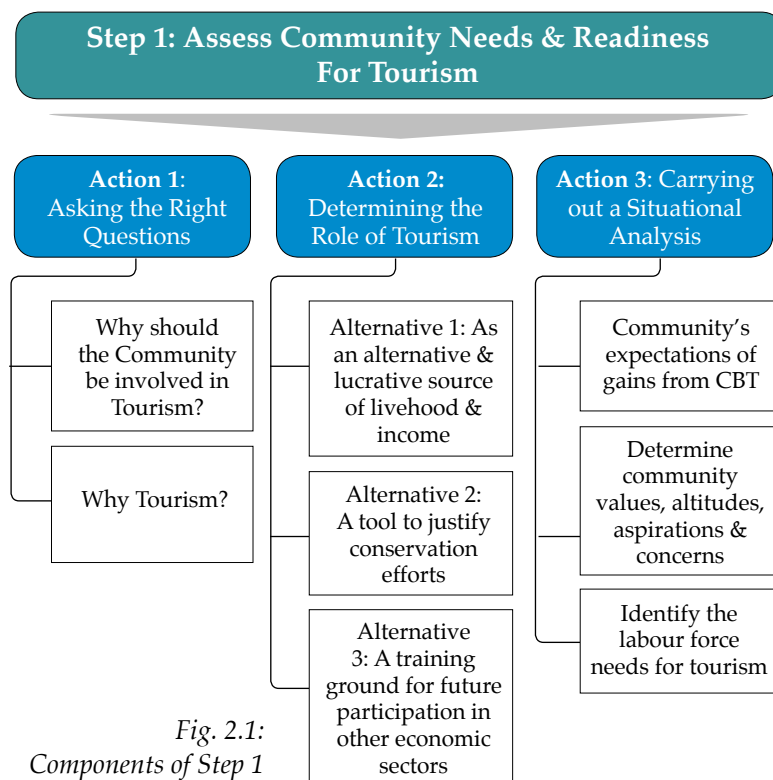


Fig. 2.1:
Components of Step 1

ACTION 1: Asking the Right Questions

Why should the community be involved in tourism? This is the key question that needs to be asked and answered before a community is ready to embrace tourism. With the advent of tourism, communities are entering into a totally different environment from what they are accustomed to, which is likely to bring about major changes to their way of life, outlook, relationships within the community and with those from outside etc. Subsequently the following questions are also pertinent:

- What is the community's current source of livelihood?
- What is their current socio-economic condition? (level of employment, average income, incidence of poverty).
- What are the long term prospects of their current source of livelihood? (opportunities

and threats).

- Are they happy with their current socio-economic condition?
- Do they want change?

Why tourism?

Having established that the community wants change for the better, why then should tourism be the agent for change? And why not the other economic sectors? With little prior knowledge about tourism, local communities are surprisingly accommodating, in the hope that tourism would bring in better economic benefits. Their positive although naive view of tourism is largely influenced by outsiders (government officials and NGOs). This often results in disappointment and disillusionment when the tourism projects that the local communities started are not producing the expected results (refer to Worksheet 1: To assess the community's readiness for tourism)



The Guisi CBRT Community, Guimaras Island

BOX 1.1:

***Disillusionment after Initial Euphoria
– Ta Phin Village, Viet Nam***

“Yes, they were so excited at the first stage, but after a few years without proper management, some of them now feel bad about tourism as they could not make a living while others are getting rich”

“...everyone was trying to get on the bus when it arrives and will automatically follow the travellers from the beginning to the end of the trip” (extracts from interview with Footprint Travel on the local community’s readiness for tourism).



A Red Dao woman in Ta Phin Village

ACTION 2: Determining the Role of Tourism

Tourism should not be regarded as a panacea and careful planning and systematic implementation are necessary for it to bring about the desired positive impact. Therefore it is essential that the role of tourism is properly communicated to the local communities especially the different ways that tourism can function, which are:

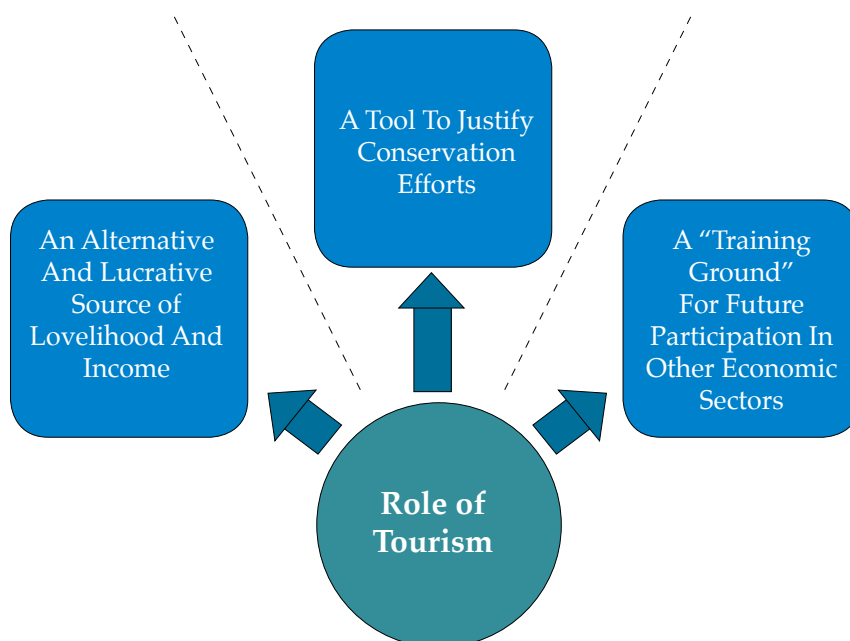


Fig. 2.2: Roles of Tourism

Role 1: Tourism As An Alternative And Lucrative Source Of Livelihood And Income

This particular role is appropriate for communities whose current source of livelihood is under serious threat, which may lead to high levels of unemployment, high incidences of poverty, which in turn, may cause social problems especially among the youths.

Kaikoura, New Zealand offers the best example of how the community leaders took the radical step of starting a wildlife tourism industry (whale watching) in anticipation of the collapse of the fishing industry and railway service that used to provide the main source of employment for the local Maori community.



BOX 1.2:
*Wildlife Tourism (Whale Watching)
Industry at Kaikoura, New Zealand*

Traditionally, the Kaikoura community were mostly fishermen, farmers and railway employees. The economic downturn in 1987, coupled with the decline of employment opportunities in the fishing, farming and the railway sector due the development of a new highway have resulted in many economic and social problems for the Maori community.

In 1989 the community leader, Bill Solomon, managed to convince four other families to mortgage their houses to raise enough funds to purchase a small eight-seat commercial boat, to start a whale watching enterprise, when wildlife tourism was not even invented on a commercial basis.

Today, Kaikoura receives 130,000 visitors yearly, and the majority of the 3000 odd local population earn their living from the marine wildlife tourism industry.

Whale watching activity in Kaikoura

Role 2:
Tourism As A Tool To Justify Conservation Efforts

In many rural and impoverished communities, tourism is often used as a means to an end. In this light, tourism has been successfully used as a tool to justify conservation efforts. However, this role is seldom documented given that commentaries on such projects prefer to focus solely on the direct economic benefit of CBT projects.

In the case of Saung Angklung Udjo (SAU), Indonesia, tourism has created significant employment opportunities for the locals, but more importantly, it has managed to preserve the unique Sundanese art (Angklung). As a testimony to the revitalisation of the Angklung, SAU's cultural troupes are regularly invited to perform within Indonesia, the ASEAN region and even in Europe, while Angklung clubs have been set up as far as Korea etc.

BOX 1.3:

Preservation of Sundanese Art by Saung Angklung Udjo (SAU)

In 1958, the late Udjo Ngalagena and his wife started an independent business which is known as Saung Angklung Udjo (SAU), which specialises in the Sundanese musical performance using the traditional angklung instrument. Over the years, the family run SAU has become a thriving centre to preserve and develop the Sundanese Traditional Arts and Cultures.

Today, SAU has 528 students, mostly youngsters from the surrounding villages learning to play the angklung and performing to tourists, while being accompanied by their parents. The number of visitors to SAU in 2008 was around 86,483 visitors, an increase of 50% from 2006. The angklung musical orchestra from SAU is also known internationally, having performed in many countries such as Asia, Europe and Africa. The popularity of the angklung among collectors has also soared and SAU currently produces around 19,200 of this traditional Sundanese instrument daily.



The students of SAU during the afternoon performance

Role 3:

Tourism As A "Training Ground" For Future Participation In Other Economic Sectors

In developing countries, government agencies have been observed to favour channelling financial assistance to communities which have a good track record. As such, communities which operate successful tourism projects and programmes are often showcased as successful rural tourism models that often attract visits from politicians, dignitaries and government agencies from within the country and abroad.

Based on their "success story", these communities are recognised as being well organised, disciplined and cohesive to be able to operate rural development projects. Consequently, most of the rural development funds that are not necessarily related to tourism are often channelled to these communities given that their perceived risk of failure would be considerably lower than "untested" communities.

For instance, the community at Kg. Batu Puteh, Sabah (Misowalai Homestay) have lately received government contracts for reforestation projects which provide a stable source of livelihood for the local women (refer Box 1.4). This proves that the skills acquired to manage and operate their CBT project are being put to use by the local community in venturing into the other (and often more stable) sectors of the rural economy. The same process is observed and recorded at Saung Angklung Udjo (refer Box 1.5).



BOX 1.4:
*From Homestay Operator to
Reforestation Contractor*

MESCOT, the CBT initiator at Kg. Batu Puteh has worked with the Sabah Forestry Department (SFD) for more than 10 years, in supporting the protection and conservation of the Supu Forest Reserve. In 2008, MESCOT received a RM50,000 grant from SFD to clear the land in preparation for tree planting activities within the Pin-Supu Forest Reserve. In 2009, SFD provided an additional RM1.3 million to fund the tree planting activities covering an area of 250 hectares.

This reforestation project has created jobs for about 50 locals, of which 20 are for women. Each worker gets a salary of between RM700 to RM900 per month. As a testimony to their newly found confidence as reforestation contractors, MESCOT has even participated in tender bids to carry out similar tasks in Peninsular Malaysia.

*Left:
Local community and tourists involved in fire
prevention and forest restoration programmes under
the Sabah Forestry Department .*

Source: Misowalai Homestay (KOPEL), 2008

BOX 1.5:

Saung Angklung Udjo - From Angklung Performance to Angklung Production

Over the years, SAU has diversified its operation by moving up the value chain, from being the angklung performance centre to a commercial producer of the angklung musical instrument. The production operation is being distributed among 11 clusters in the surrounding villages. Modern equipments and techniques are being used to improve the quality of the instrument and SAU even commissioned researchers from the local university to conduct research on the species of bamboo that produce the best sound.



Two of the angklung manufacturing clusters at SAU

ACTION 3: Carrying Out a Situational Analysis

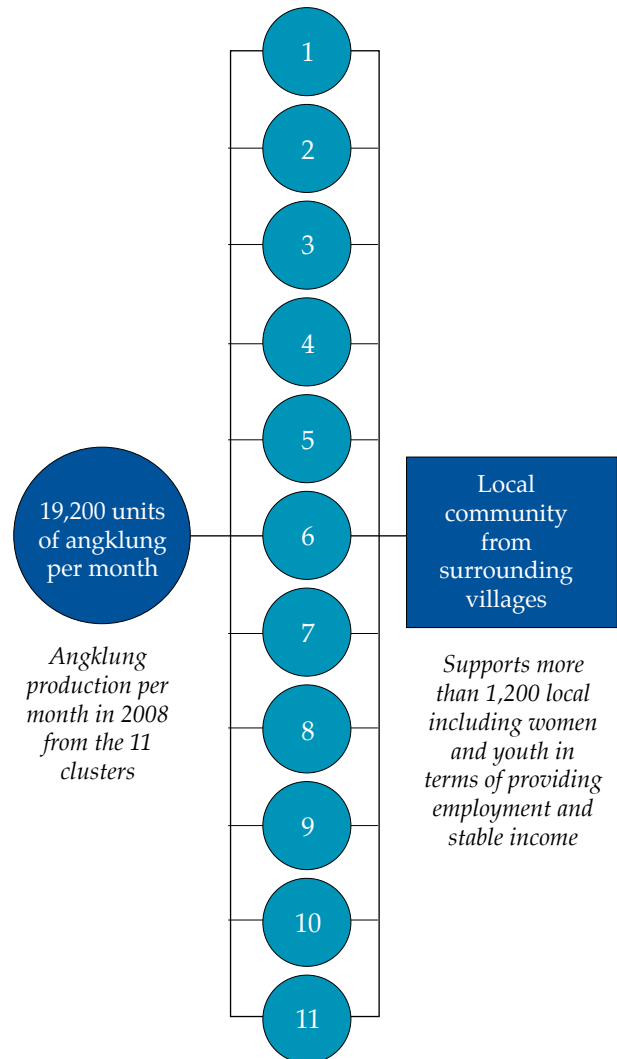
Having answered the key questions above, Step 1 should then proceed by carrying out a Situational Analysis of the community's attitude, concerns and aspirations. Assuming that the community wants to embrace tourism, the Situational Analysis should cover the following:

a. What does the community expect to gain from CBT?

Their expectations should not be solely confined to economic benefits such as more jobs and better income but should also include non-monetary gains such as the increase in social cohesion and pride in local community. Do not impose materialistic values because the case studies have shown that the non-monetary gains are equally or more important to the locals (e.g. forging friendship with people from all over the world and increase in self esteem).

b. Determine community values, attitudes, aspirations and concerns.

In most communities, the elders still command respect and the best way of ensuring "buy in" from the entire community is to ensure that any CBT project in the future will not jeopardise the existing community structure and values. Forging a sense of ownership and ensuring local control from the beginning are crucial given the expected interest from tour operators and other outside parties once tourism projects are implemented. Of prime concern is what the community is not willing to give up for the sake of tourism.



Production operation is being distributed among 11 clusters in the surrounding villages

Fig. 2.3: Angklung Production Operation by Clusters

c. Identify the labour force needs for tourism.

In identifying the labour force needs, include the indigenous knowledge of the community as a unique human resource skill. As proven in Kg. Batu Puteh (Misowalai Homestay) the former loggers have been able to use their deep understanding and knowledge about the local fauna and flora to good effect once they are hired, trained and certified as guides for the nature tours.

BOX 1.6:

Former Logger Turned Conservationist / Guide



Former logger turned conservationist / guide

Before being involved in the MESCOT project, Yahya was working for timber camps for more than 10 years. After the timber industry was forced to cease operation by the early 1990s, he was given a job as a guide for Misowalai Homestay.

His experience and vast knowledge of the jungle are now being used in his interpretation while taking tourists on nature tours. Recently, Yahya was appointed as the local supervisor for the forest restoration programme funded by the Sabah Forestry Department (SFD).

Sample of Worksheet (*Adapted from Canadian Universities Consortium, 2000*)

Worksheet 1.1: To assess your community's readiness for tourism

The following are some questions designed to help gather information which will enable you to assess your community's needs and readiness for tourism:-

Economic

- What is the unemployment picture in your

community? Is it seasonal? Do youths leave the community to seek employment?

- How are the local businesses and shops doing? Are you satisfied with the ranges of shops and services in the community?
- Is there one dominant industry that the community depends on economically? Are there seasonal fluctuations in local economic activity?

Social/Cultural

- What do you enjoy most and least about living in this community?
- What are the things that you pride most about your community?
- Are you satisfied with the range of leisure activities in your community?
- How do you feel about sharing your recreation and leisure environments with tourists?
- What facilities or services are lacking in the community?
- Overcrowding? Noise?

Environmental (Natural)

- Conservation concerns?
- How would you feel about sharing protected areas and other natural recreational areas with tourists?
- Other environmental concerns (pollution etc.)?

Environment (Building and Infrastructure)

- Do building designs reflect community character?
- Where is restoration required?
- How are the aesthetics, visual presentation of your community and area (clean, etc.)?
- Are tourists attractions are services are well marked? How about signage into the community from the main access points?
- Is there anything needed to enhance community character and image?
- Type and scale of development desired?

Summary of Step 1:

ACTION 1: ASKING THE RIGHT QUESTIONS

Why should the community be involved in tourism?
Why tourism?

ACTION 2: DETERMINING THE ROLE OF TOURISM

TICK

- a. Tourism as an alternative and lucrative source of livelihood and income
- b. Tourism as a tool to justify the conservation efforts
- c. Tourism as a "training ground" for future participation in other economic sectors

ACTION 3: CARRYING OUT A SITUATIONAL ANALYSIS

1. What does the community expect to gain from CBT?

- a. Increase income
- b. Employment opportunity
- c. Upgrade the quality of life style
- d. Complement the current physical development

2. Determine Community Values, Attitudes, Aspiration and Concerns

- a. Pride in community
- b. Conserve local culture
- c. Sense of ownership

3. Identify the Labour Force Needs For Tourism

- a. Level of education
- b. Previous occupation
- c. Current occupation
- d. Special skills

OUTPUT: THE COMMUNITY'S LEVEL OF READINESS FOR TOURISM

TICK

- a. Resources (culture/heritage/nature/coastal)
- b. Community attitude
- c. Special skills
- d. Available capital
- e. Indigenous

For more references, please visit the following websites:-

- http://www.crc.uri.edu/download/COA_0010.PDF
- <http://www.city.kimberley.bc.ca/files/%7B472FD5DF-1B7B-4C7E-A5BB-506E9D896DD2%7DSituation%20Analysis.pdf>
- http://www.snvworld.org/en/Documents/Knowledge%20Publications/ASIA-SNV%20value%20chain%20booklet%20_final.pdf
- http://www.snvworld.org/en/Documents/Knowledge%20Publications/Asia-TOURISM-Facilitating_Sustainable_Mountain_Tourism-Vol1-2007.pdf
- http://www.undp.org/publications/Report_growing_inclusive_markets.pdf

Educate and Prepare the Community for Tourism



Step 2

Step 2

Educate and Prepare the Community for Tourism

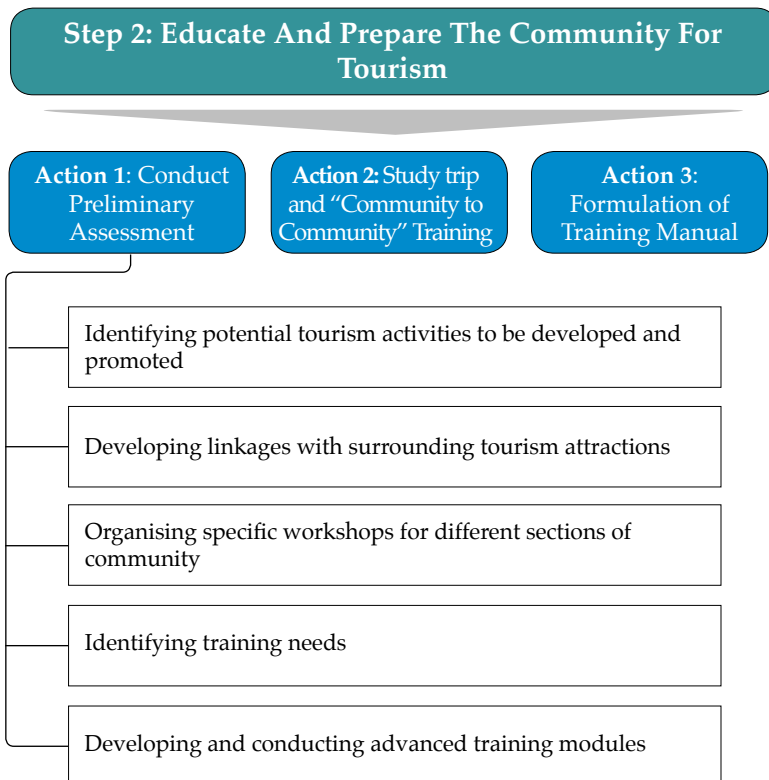


Fig. 3.1: Components of Step 2

Once a community decides to embrace tourism, educating and preparing the community are crucial. While it is a fact that most rural communities are by nature hospitable, tourism as a business presents greater challenges. Even in developed APEC economies such as New Zealand, community ignorance and a lack of preparation were still prevalent until the early 1990s. As in the case of Kaikoura, the lack of understanding on the business and impact of tourism led to jealousy and unhealthy business rivalry among the local Maoris.

BOX 2.1:

Whale Watching 'Crazy Season'

"The 'crazy season' of whale watching emerged after the project received overwhelming response from tourists. Envious of the huge sum of money made by whale watching operators, certain fractions of the local community took the law in their own hands and showed their frustration by burning down tourist coaches used for whale watching. This insane irrational behaviour came under control with the assistance of the police. Fortunately, negotiations among the locals managed to settle their differences" (adapted from presentation CD given by Whale Watch).

Whale Watch Tour Coach burnt by marginalised locals



Essentially the local community should be well informed and educated about the many facets of tourism prior to the construction of any form of tourism physical development or activity. The education process should take a longer time for relatively remote society will low levels of education. The Guisi experience shows that the community education process took up to 5 years before physical development was introduced.

BOX 2.2:

Time is the Essence

Local community requires time to accept and develop a tourism culture. The Guisi Community Based Heritage Tourism Project (GCBHTP) first started in 1999 but only received tourists in a big way in 2004. A tourism master plan was prepared by the government and it took around 5 years for the local government to instil awareness and build confidence amongst the local community towards tourism. Partnership with the Canadian Urban Institute (CUI) provided the initial monetary and technical assistance for this project. For the local community to accept, understand and see the importance of tourism, various workshops with topics mentioned below were organized. Until the community have really understood what community based tourism is all about, only then the government promoted the area and encouraged tourists to visit the destination.



*Above:
Village kids performing a Filipino traditional dance during the welcoming ceremony for guests*



Fig. 3.2: The various workshops conducted at Guisi

Efforts in educating and preparing the community are evident in the more recent CBT cases such as Ta Phin, Guisi and Misowalai (capacity building). Based on the lessons learned from the above case studies, this handbook recommends the following actions:

Action 1: Conduct Preliminary Workshops

A series of preliminary workshops should be conducted in the initial stage to achieve the following objectives:

1. Identifying Potential Tourism Activities To Be Developed And Promoted

The preliminary workshop should bring together the entire community to discuss and identify the resources and activities within the village that would appeal to tourists. The workshop should take the form of a brain storming exercise to, firstly, give the opportunity for everyone to make suggestions, and secondly, for the workshop to evaluate and rank the proposed activities in the form of a "Top 10 Attractions/ Activities".

*Training workshop at Misowalai Homestay
Source: Misowalai Homestay (KOPEL), 2008*

BOX 2.3:

Preparing the Community

The MESCOT project in Kg. Batu Puteh, Sabah was started in 1997, with funding from WWF Norway and a local NGO. The project is also supported by the State Ministry of Tourism and Environmental Development and Sabah Forestry Department. This main aim of the project is to assist the local community to plan eco-tourism activities and build local human capacity for managing the activities.

In the preliminary stage, the MESCOT community group conducted "village-level dialogues" to explain the objectives of the project and to foster camaraderie within the local communities. The group together with the local community also gathered and documented information related to the "aural history", traditional belief, traditional medicines, and traditional uses of forest resources, indigenous culture and the historic significance of the village. A small village house was rented and became the meeting place for discussions and centre for research activities.



2. Developing Linkages With Surrounding Tourism Attractions

In most instances, a particular village will not have the strength to stand on its own as a tourism destination. As such, a follow up workshop should be held to determine how the village can be positioned and packaged as part of an attractive tourism destination corridor. For instance, Misowalai is sold as part of the Lower Kinabatangan Wildlife Sanctuary.

Proboscis monkey is a common sight at the Lower Kinabatangan Basin

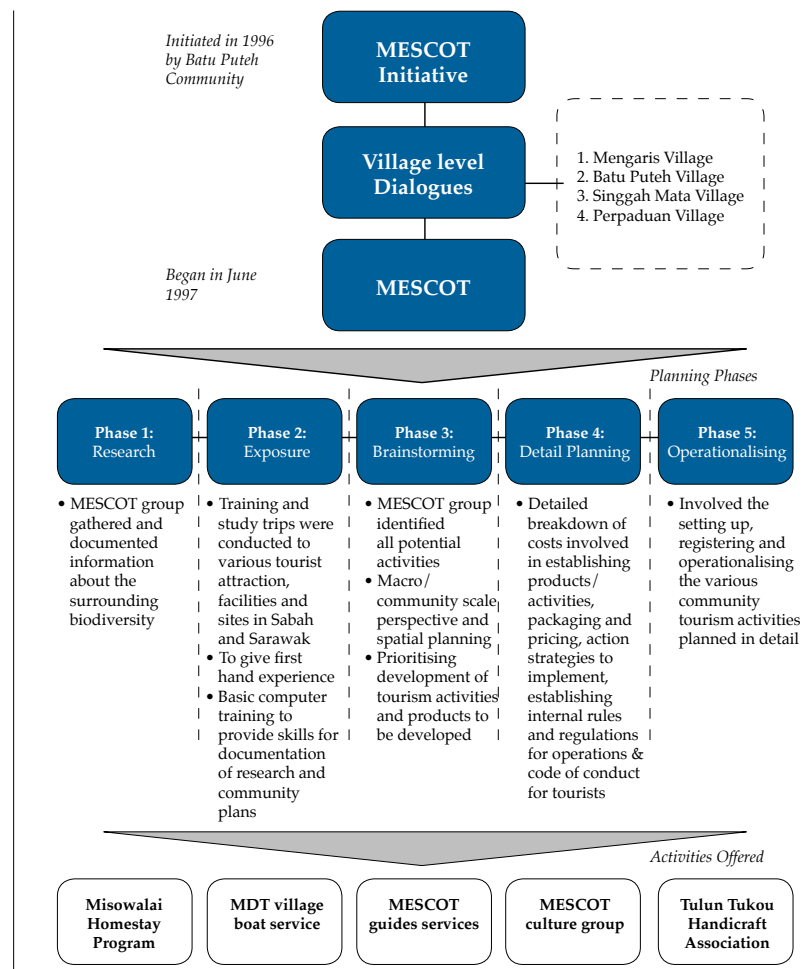


Fig. 3.3: CBT initiated process by Misowalai Homestay

NATURAL BIODIVERSITY

LOWER KINABATANGAN WILDLIFE SANCTUARY

CULTURAL HERITAGE

BOX 2.4:

Misowalai Homestay as Part of the Lower Kinabatangan Wildlife Tourism Corridor

- Primates species such as the endemic proboscis monkey, the Borneon gibbon, three langour species, the orang-utan and horbill species.
- Wildlife and endangered species including three species of otters, seven species of civet cats, sun bear and the Borneo pygmy elephant.
- The wetlands, limestone caves and lakes.
- More than 10 different language dialects spoken.
- The local people known as the "Orang Sungai" (or River People)
- Trade of forest produce by local people such as incense woods, ivory and edible birds nests.

3. Organising Workshop On Involvement Of Different Sections Of Community

Having identified the potential tourism resources/activities within the village and in the surrounding areas, another workshop should be conducted to determine the role of different sections of the community. For instance, the local youths could be trained to become guides and cultural performers while the women could be hired as caterers and for housekeeping as well as producing handicrafts. It is also crucial that the workshop identify not only those who can be involved, for instance, in the production of handicrafts but also the individuals who have the marketing and management skills to run a handicraft centre. The Misowalai experience reveals that despite the high level of skills among the women folk in producing handicrafts, the homestay committee could not get a local with the necessary skills to operate the handicraft/souvenir shop.

BOX 2.5:

Capitalizing on The Community's Strength: Kuku Yalanji Dreamtime Walks

The interpretive guides of Kuku Yalanji Dreamtime Walks are excellent in describing and sharing their knowledge on the traditional plants, cave shelters, artefacts and paintings during the 1.5 hours walk through the Mossman Gorge, Daintree National Park. As only seven guides are involved in the walking tours, other members of the community contribute through the production of art and artefacts of Aboriginal culture such as paintings, boomerangs, hand painted jewellery, spears etc. which are being placed in the art gallery for sale. The women too contribute in their own way by selling refreshments at the visitors centre.

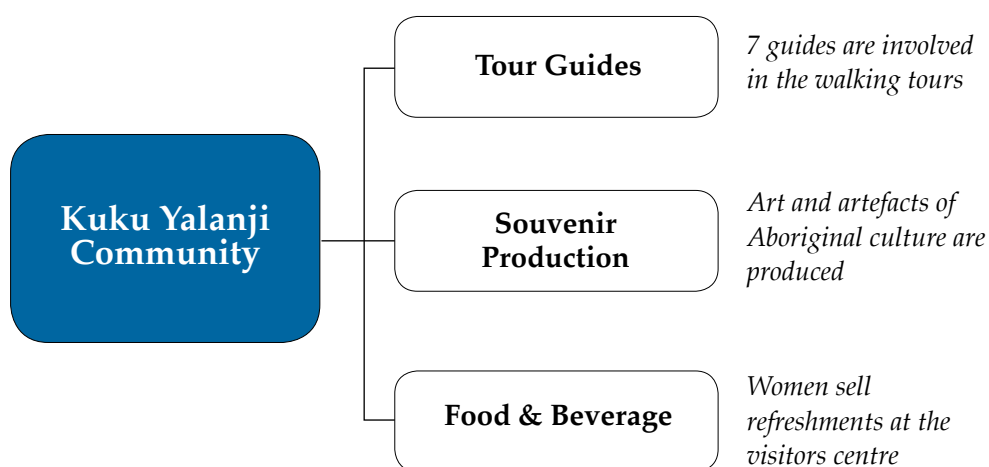


Fig. 3.4: Activities carried out by Kuku Yalanji Community



Art and artefacts related to Aboriginal culture displayed at the Art Gallery of Kuku Yalanji Dreamtime Walk

4. Identify Training Needs

In the last of the series of workshops, the community should identify the gaps in their knowledge and skills. Subsequently, this will provide the basis for them to identify the training needs to be fulfilled in the advanced workshops.

5. Developing And Conducting Advanced Training Modules

By the time the community is at ease with the concept of demand and supply in tourism (as communicated through the preliminary workshops), they are then ready to be given more structured exposure and training. In essence, the advanced training should be conducted in the form of modules, covering aspects such as :

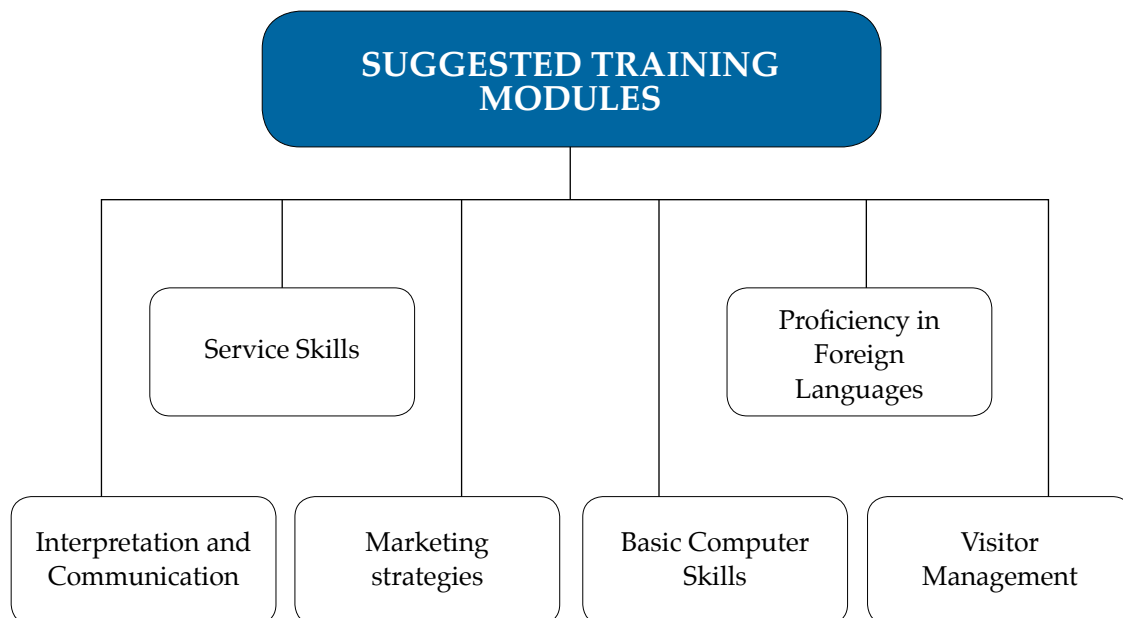


Fig. 3.5: Suggested Advance Training Modules



Information about the local customs are displayed at the Cultural and Tourism House managed by the Ta Phin community

BOX 2.6:

Capacity Building Involving the Ta Phin Community

Part of the capacity building programme for the local community includes the eight modules described below which are designed to educate and develop local community skills. The modules are:-

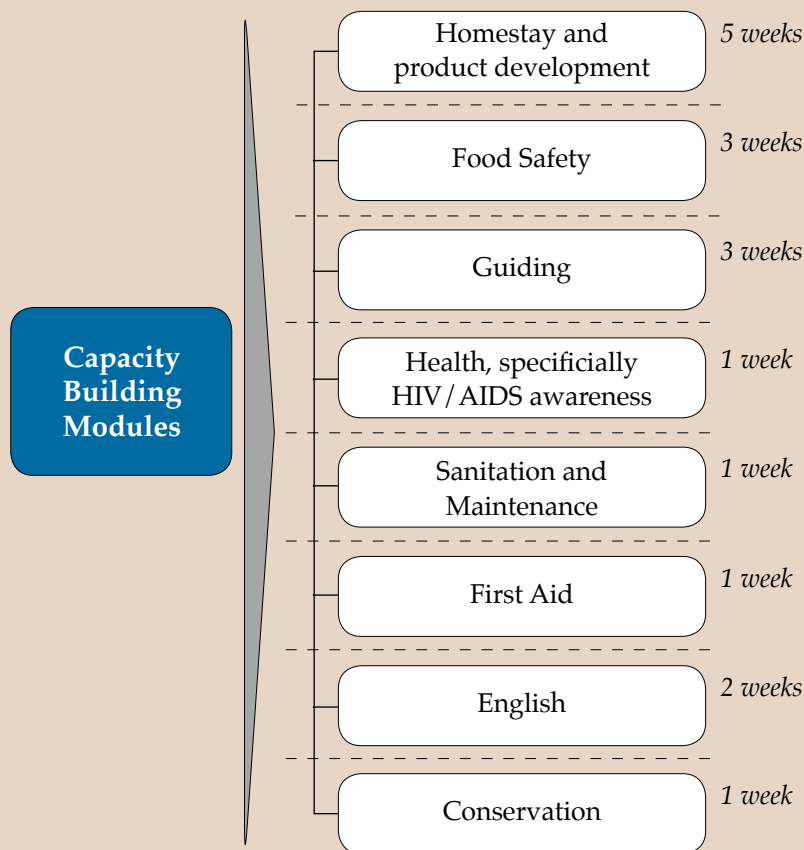


Fig. 3.6: Capacity Building Modules for Ta Phin Village

These modules are being taught in phases in a total duration of 17 weeks. Discussions are also conducted to increase the community's understanding of the negative impacts of tourism, and to come out with appropriate solutions to mitigate environmental and cultural impacts. In addition, the mentor-mentee approach has enabled the older generation to transfer their knowledge on traditional customs to the younger generation. The outcome of these efforts includes the setting up of the Ta Phin Cultural and Tourism House, which showcase their unique culture and the formulation of a code of conduct for visitors.

ACTION 2: Study Trip and "Community to Community" Training

As opposed to classroom learning, study trips to established CBT projects are more effective in exposing the community to real life situations. In addition, it will give the opportunity for the community to experience the feeling of being served and to be judgemental about the level of service and hospitality as well as the quality of the tourist experience being offered to them. This will help them understand that guests can be demanding, fussy and expect the best during their stay. Such valuable lessons learned from these trips will help the community in coming out with new ideas to enhance their product, tourist experience and service quality.

"Community to community" training is only applicable for study trips by a particular ethnic minority to another community belonging to the same ethnicity but with a long experience in CBT. As observed, the spirit of camaraderie is stronger in such training programme and language and cultural barriers are also significantly reduced.

ACTION 3: Formulation of Training Manual

To ensure that training is carried out in a systematic and consistent manner, a training manual should be formulated. This is essential to ensure the sustainability of CBT projects from the perspective of human resource development, as reflected in the Misowalai case study. With the documentation of the training modules and instructions etc. in the manual, although the management committee and trainers may change in the future but the training structure and system will remain intact.

BOX 2.7: "Hands On" Approach: Study Tips



*Local community during study trip.
Source: Misowalai Homestay (KOPEL), 2008*

In the second phase of the capacity building programme at Misowalai Homestay, MESCOT group organised study trips to further expose the local communities on the realities of CBT. It is also a good platform for networking, sharing of experiences and exchanging of ideas. The local community visited various ecotourism sites, tourist attractions and tourist facilities around the State of Sabah and Sarawak such as Mt. Kinabalu, Danum Valley, Gua Mulu Sarawak etc. Lessons learned from these trips include:

- "hands-on" experience of service skills, marketing strategies, interpretation and communication requirements as well as management skills
- Ideas for the reduction of site impacts
- Expose the difficulties of travelling and touring to participants

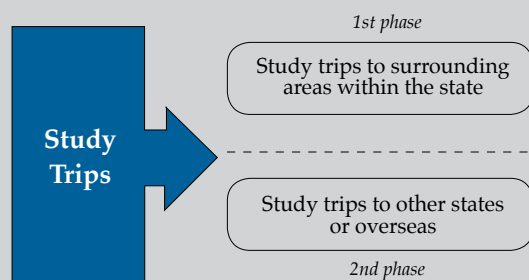


Fig. 3.7: Types of Study Trips

Worksheet 2.1: Inventory of tourism resources

The following is an example of a resource inventory from:

Types of Resource		Name of Resource	Location
Natural Areas	Park/Natural Areas Lake River Waterfalls Shorelines Forests Topography Vegetation View Unique Landscape		
Cultural Resources	Museum Galleries Theatres Festivals/Traditional Events Artisan Local Food Traditional Lifestyle Other entertainers: singer, musician, storytellers etc.		
Visitor facilities/ services	Lodging/ Accommodation Restaurant/ Food Stall Souvenir Shops Tourist Information Centre Public Toilet Cultural Centre Signboard/ Signage		

For more references, please visit the following websites:-

- <http://www.culturalheritagetourism.org/steps/step1.htm>
- http://eprints.utas.edu.au/3019/1/Tasmania_Wildlife_Tourism_Inventory.pdf
- <http://www.cultureandtourism.org/cct/lib/cct/HistoricResourcesInventory2.pdf>
- <http://www.cbnrm.net/resources/training/index.html>

- <http://www.charmproject.org/cms/CHARM%20Archive Documents/REST%202005%20Marketing%20WS%20Report.pdf>
- <http://www.recoftc.org/site/index.php?id=355>
- <http://unesdoc.unesco.org/images/0012/001252/125292e.pdf>
- http://www.jsieurope.org/docs/cmeiacst_training_manual.pdf
- http://www.ccben.org/Training/CBET%20Annoucement_Eng.pdf
- <http://www.ccben.org/CBET-in-Stung-Treng-Kratie.html>
- <http://www.qaproject.org/training/tot/ref1.pdf>
- http://www.mekongtourism.org/site/uploads/media/Module_2_CBT_Development_report_MI.pdf

Summary of Step 2:

ACTION 1: CONDUCT PRELIMINARY WORKSHOPS	TICK
WORKSHOP 1 : Identifying potential tourism activities to be developed and promoted	
a. Discuss and identify the available resources and activities	<input type="checkbox"/>
b. Evaluate the existing resources and rank them	<input type="checkbox"/>
c. Select the top 5 – 10 attractions/activities to develop	<input type="checkbox"/>
WORKSHOP 2 : Developing linkages with surrounding tourism attractions	
a. Identify the surrounding resources	<input type="checkbox"/>
b. Carry out an inventory of surrounding resources (location/ distance/ uniqueness/ physical and etc.)	<input type="checkbox"/>
c. Develop corridors and packages	<input type="checkbox"/>
WORKSHOP 3 : Organising workshop on involvement of different sectors of community	
a. Identify the types of contribution (e.g. services/ entrepreneurship and etc.)	<input type="checkbox"/>
b. Develop specific bureaus	<input type="checkbox"/>
WORKSHOP 4 : Identify training needs	
a. Identify the gaps in term of the knowledge and skills	<input type="checkbox"/>
b. Determine the training needs for each section of community (e.g. women/ youth/ guides and etc.)	<input type="checkbox"/>

WORKSHOP 5 : Developing and conducting training modules

- c. Determine the training method (theory/ hands on)
- d. Determine the content of modules

ACTION 2: STUDY TRIPS AND "COMMUNITY TO COMMUNITY" TRAINING **TICK**

- a. To expose community to real life situation
- b. To enhance the production, tourist experience and service quality

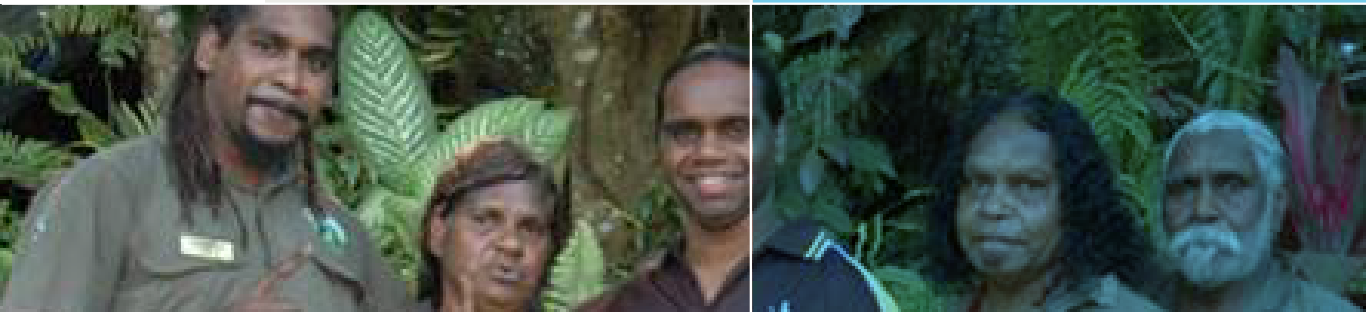
ACTION 3: FORMULATION OF TRAINING MANUAL **TICK**

- a. To ensure trainings carried out in a systematic and consistent manner
- b. Documentation of the training modules and instructions
- c. Formulate the training manual



The visitor centre at St. Jacobs County was set up to educate visitors about the Mennonite community.

Identify and
Establish Leadership
/ Local Champion



Step 3

Step 3

Identify and Establish Leadership / Local Champion

The success of CBT projects is essentially dependent on leadership and organisation. Government agencies or NGOs often act as the project initiator but the long term viability of such projects depends on the sense of ownership and buy in from the local community. Central to the continuous support from the community is the presence of a strong leader who commands respect.

The leader can be a government appointed project manager, a dedicated volunteer hired by an NGO or a self appointed spokesperson for the community. In this light, the job title or designation of the leader is not important compared to his/her commitment, dedication and passion for the job. To be exact, the leader should be termed as the local champion, and the majority of the case studies are driven by local champion (s). The local champion need not be officially elected and can also be from outside, albeit having stayed in the area for a considerable length of time.

As evident in the case studies, the **local champion** has to have many positive qualities but the **most essential prerequisite is the ability to galvanise and transform the community**. They should also be risk takers but only after gauging the economic and social viability of the project. The other qualities that a local champion should have are as follows:



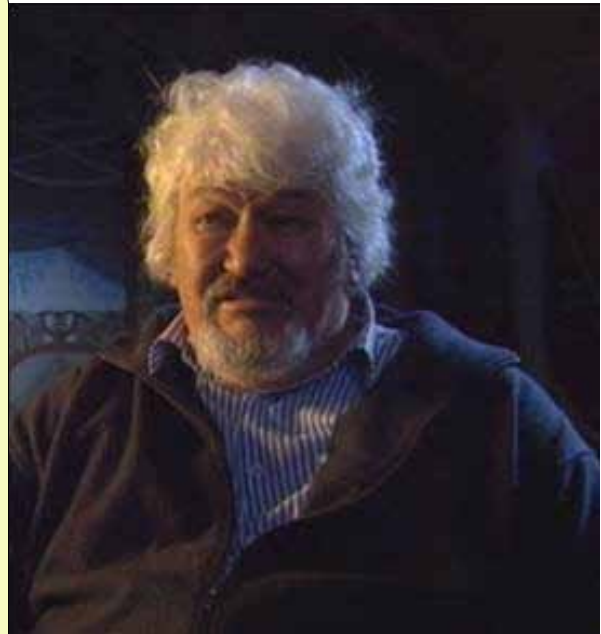
A local champion breeds local champions. Hence it is also important that the local champion is given the freedom to identify and train his/her successor or a team of local champions. The Kaikoura case study demonstrates the crucial role of local champions in the formative years of CBT projects, followed by the birth of a second tier of local champions as the project matures.

BOX 3.1:

Bill Solomon and His Whales

In 1987, a local Maori leader at Kaikoura, Bill Solomon, could foresee that the fishing industry and railway services that had for decades provided the local community with jobs were at the point of collapse. At the time when wildlife tourism was unheard of, Bill proposed the novel idea of purchasing boats to be used to transport tourists on whale watching trips off the coast of Kaikoura. Since government agencies and financial institutions were not willing to provide either financial assistance or credit facility, Bill had to convince 4 other elders to mortgage their homes to finance the purchase of the boats.

The 4 elders took what was then considered as a major risk because of their respect and trust in Bill Solomon. Despite the initial difficulties, the whale watching industry grew from strength to strength and today Kaikoura attracts about 130,000 tourists annually, which is no small feat for a town of 3000 people. Bill Solomon was a true visionary who could anticipate the changes in tourist demand well before the concept of wildlife tourism was expanded to include marine wildlife. In the development of CBT at Kaikoura, Bill played a crucial role as a true local champion and had also managed to nurture a second line of local champions before passing on.



The late Bill Solomon

BOX 3.2:

Roy Gibson and His Dreamtime Walks



Roy Gibson, second from right, with his fellow guides from Kuku Yalanji Dreamtime Walks

Local champion Roy Gibson is an Elder of the Mossman Gorge Aboriginal Community. He could foresee the potential of the tourism industry as a income source to the community and his induction into the tourism industry was by setting up a small stall to sell coconut drinks to tourists who passed by his local community on their way to the Mossman Gorge Park in the early 1980's. Rangers from the government agency used to hire Roy and his friends to be their guide to enter the rainforest. After being impressed by their ability, the rangers suggested that they conduct the walking tours in the rainforest as a form of tourism activity. In 1986, Roy and his friends built the walking tracks using their own money. They also used their savings and worked without getting any salary. Gradually government agencies came in to provide machinery to support their effort.

In 1987, Kuku Yalanji Dreamtime officially started their business operation with support from the local residents, who handled the management aspect of the business. In addition to the walking tours, the management team brought artefacts from the nearby community to sell to tourists. After some time, the Mossman Gorge community started to produce their own arts and artefacts to sell. The current total tourist arrivals are 9,000. Till today, Roy Gibson still contributes to the Dreamtime Walks as a Tour Guide and shares his 30 years of experience with tourists. He is also the current chairman of the Bamanga Bubu Ngadimunku Inc.

Summary of Step 3:

ACTION 1: IDENTIFY LOCAL CHAMPION	TICK
a. Visionary	<input type="checkbox"/>
b. Good Communication	<input type="checkbox"/>
c. Disciplined	<input type="checkbox"/>
d. Proactive	<input type="checkbox"/>
e. Innovative	<input type="checkbox"/>
f. Sensible	<input type="checkbox"/>
g. Patient	<input type="checkbox"/>
h. Trustworthy	<input type="checkbox"/>
i. Courageous	<input type="checkbox"/>
j. Never say die attitude	<input type="checkbox"/>
k. Dedication	<input type="checkbox"/>
l. Commitment	<input type="checkbox"/>

For more references, please visit the following websites:-

- <http://www.snvworld.org/en/Documents/Knowledge%20Publications/Case%20Chepang%20community%20experience.pdf>
- <http://www.trce.org/Portals/0/docs/certification/ERC%20criteria.pdf>

Prepare and Develop Community Organisation



Step 4

Step 4

Prepare and Develop Community Organisation

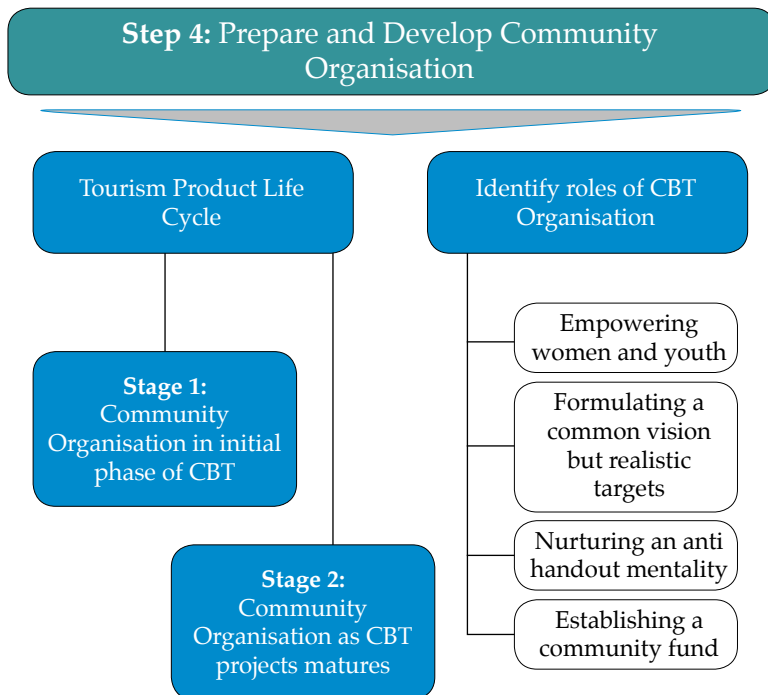


Fig. 4.1: The components of Step 4

At this juncture, the leader or local champion should attempt to establish a community organisation that is capable of planning, operating and promoting CBT projects. Given that “buy in” from the community is essential, the community organisation should include every section of the community especially the women and youths.

CBT projects will go through a life cycle that may include a decline phase should the leadership and organisation fail to reinvent the existing product once it evolves and matures. The evolving stages in the product cycle of CBT projects require different organisation structures:

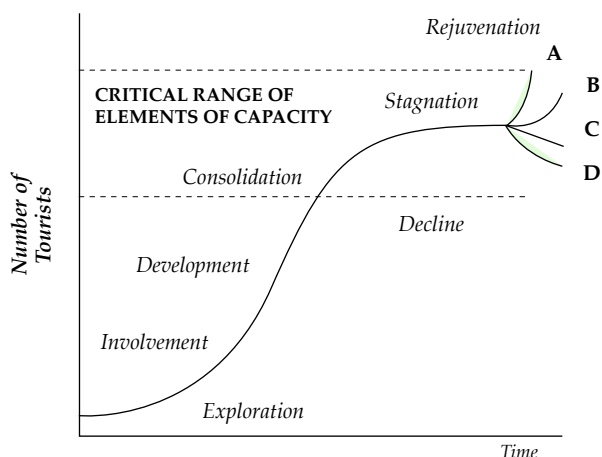


Fig. 4.2: The Tourist Area Life Cycle Concept (Butler, 1980)

STAGE 1: Community Organisation In Initial Phase Of CBT - Drawing Solely From The Talents Within The Local Community

In most of the case studies, the community organisation was initially made up of talented and committed individuals from within the community. Given the voluntary nature of their involvement, having a passion for the job and the desire to serve are the 2 important qualities that the office bearers should possess. As most of the office bearers were not experts in the

field of tourism, the professionalism and know how required to operate a successful tourism business were lacking but these shortcomings were often compensated by their drive and dedication. Moreover, the nature of the CBT business in the initial stages was small scale and hence, did not require great expertise.

STAGE 2: Community Organisation As CBT Project Matures - Seeking Professional Help Without Sacrificing Community Structure

As CBT projects matured and even became part of mainstream tourism (as in Kaikoura and Saung Angklung Udjo), the business dimensions and relationships with other stakeholders in the industry also became more complex. Furthermore, the destination/ village inevitably attracted a more diverse market segments, each with different needs.

More often than not, the volunteer based organisation were not able to cope with these changes, which led to the reduction in the quality of the tourist experience, which in turn, resulted in a drastic drop in tourist arrivals (Saung Angklung Udjo).

In the case of Saung Angklung Udjo, the family-operator decided to take the radical step of seeking professional help, in the form of hiring a Director of Operations who managed to turn around the business operation without sacrificing its community based structure (Fig.4.3). Most CBT projects are likely to go through the same life cycle and their long term viability will be affected if the role of professionals is not recognised as an essential member of the organisation.

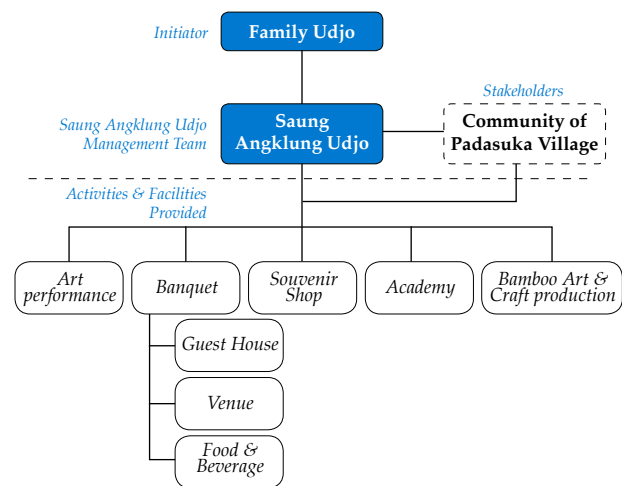


Fig. 4.3: New Organisation Chart for SAU

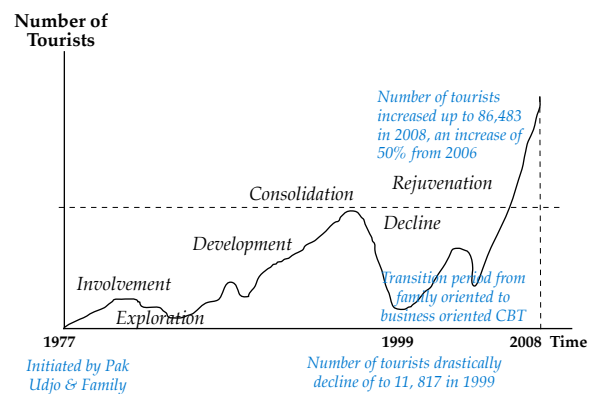


Fig. 4.4: Number of Tourist Arrivals for SAU, 1977 - 2008

A. Roles of CBT Organisation

1. Empowering Women And Youths

The community organisation that operates the CBT project should be able to empower the local women and youths by creating specific bureaus for them. The appointment of office bearers and designation of roles should be based on the talents available. In most of the case studies, local youths are suited for the role of guides, boatmen and cultural performers. Meanwhile the local women are often entrusted to handle community feasts, housekeeping and the production of handicrafts.

BOX 4.1:
**Empowering the Women
 and Youths at Seongeup
 Folk Village, Jeju**

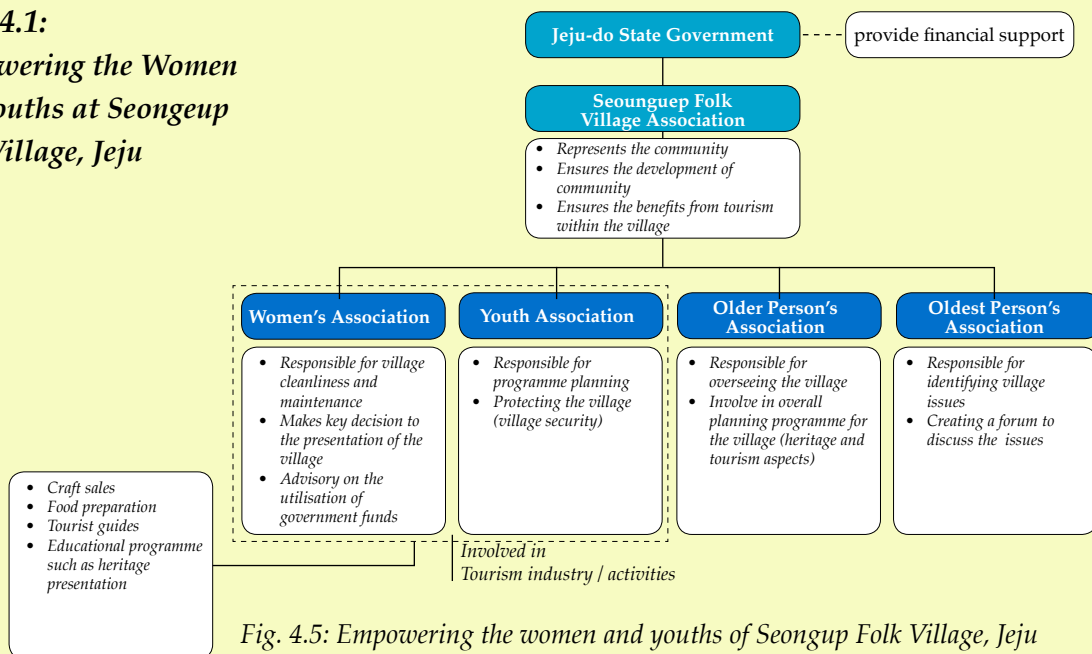


Fig. 4.5: Empowering the women and youths of Seongeup Folk Village, Jeju

In Seongeup Folk Village there are specific associations for women and youths. These associations will give voice to the community, and ensure that their views and ideas are being considered in the planning and operation of CBT. The Women’s Association is responsible for the overall village cleanliness and maintenance. This group makes key decisions related to the presentation of the village as well as playing an advisory role on the utilisation of government funds. The Youth Association is responsible for programme planning related to cultural performances, overall security of the village and are also being employed as tourist guides. These two groups are also involved in craft sales, food preparation, and educational programmes such as heritage presentations.



Local guide briefing visitors

While there are the relatively limited job prospects for the women and youths in the initial phase of the CBT project, entrepreneurship opportunities will often be created for them once tourist arrivals increase. Therefore, the organisation should include a specific bureau to encourage and nurture entrepreneurship among the women and youths.

BOX 4.2:
Empowerment and Ta Phin's New Generation of Women Entrepreneurs

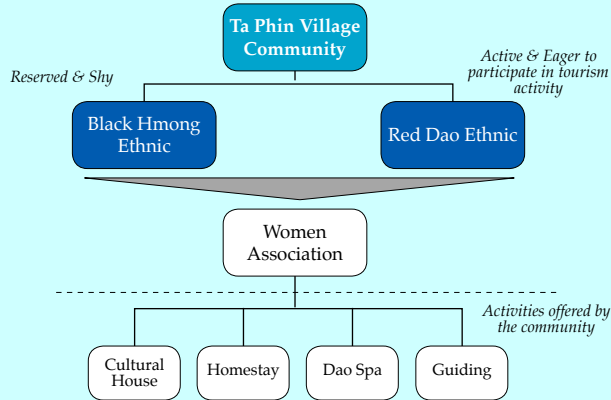


Fig. 4.6: CBT and woman involvement in Ta Phin Village

The women in Ta Phin plays an active role in tourism. This is clearly demonstrated with the establishment of the first homestay by Mdm. Ly May Chan, the head of Red Dao Women Association of Ta Phin Village. Moreover, all the other homestays that followed suit were also initiated by women. In addition, many young ladies in the village are involved in the guiding profession. Meanwhile the men in the village are more involved in agricultural activities and are less keen on tourism.

Ta Phin village has two major ethnic groups; Red Dao and Black Hmong. The Red Dao women are active and more eager to participate in the various tourism activities in comparison with the women from the Black Hmong ethnic group who are relatively more reserved and shy. Women in this village are also involved actively in the production of handicrafts. The local government of Lao Cai has also assisted this initiative by providing funds for the purchase of sewing machines. The women association here collects the handicrafts made by women and youths and channel them to the Ta Phin Cultural and Tourism House, a one stop souvenir outlet centre for tourists.



2. Formulating A Common Vision But Realistic Targets

Once the organisation is in place, it should then provide the direction to guide the community in implementing CBT. Remote communities may not be ready to participate in community workshops that involve the use of public participation tools such as visioning. This, however, does not reduce the importance of getting a consensus from the community regarding the tourism plans for the area. The locals should also be informed about the likely impact of tourism, how it will change their lives and the sacrifices that they would have to make. The lack of common vision was the main contributing factor towards the intense jealousy felt by sections of the local community at Kaikoura when the whale watching industry there was in its infancy, which resulted in the burning of tourist coaches (refer Step 2/Box 2.1).

Having formulated the common vision, the organisation should then set realistic targets, taking into consideration factors such as the community's level of education, skills and training gaps. Local expectations are often unrealistically high with the advent of tourism (refer Step 1/Box 1.1), therefore it is crucial that the targets set are modest and incremental in nature as well as measurable (Guisi and Misowalai). In addition, the targets should not only include monetary benefits but also non-monetary gains (refer to Worksheet 4.1: How to Formulate Vision).

3. Nurturing An Anti Handout Mentality

One of the common features among the case studies is their independence and lack of

reliance on government handouts. While it is true that the more recent CBT projects that were initiated by international NGOs have not reached the level of self reliance, the more established ones are proudly independent.

Specifically, it is the effort of the CBT organisation in fostering a strong sense of ownership that has been responsible for the strengthening of the anti handout or anti subsidy attitude among the community. Saung Angklung Udjo has been fiercely independent right from the start and Misowalai can proudly show tourists their Eco Camp which, although funded by a government agency, was totally built by the locals. To surmise, nurturing an anti handout mentality is an essential task for the organisation to undertake right from the beginning of the CBT project to ensure its sustainability.

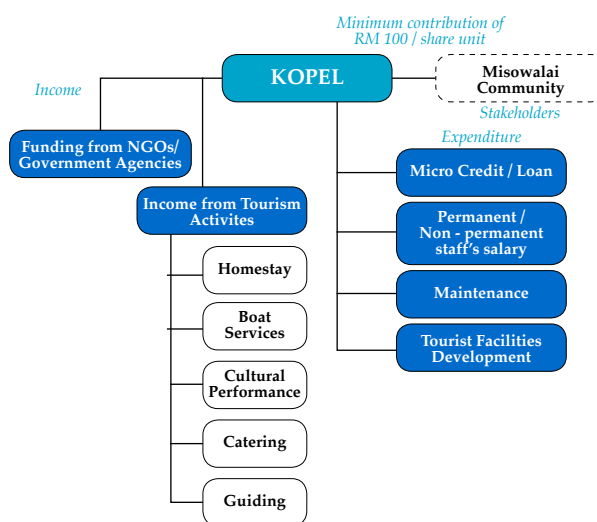


Fig. 4.7: Financial Model of KOPEL

4. Establishing A Community Fund

At the earliest time possible, the organisation should set up a community fund to manage

the income and expenditure related to the CBT projects. This should preferably be in the form of a revolving fund in which the locals could also obtain micro credit at low interest to start small businesses. In addition, a small percentage of any income derived from tourism projects and activities should be channelled to the community fund to be used for socio-economic development such as buying computers for the local youths and children (refer figure 4.7).

BOX 4.3:
Saung Angklung Udjo's Community Fund

The biggest portion of SAU's profit from its operation are channelled back to the performers, who are mostly youths and children from the surrounding villages.

Interested candidates have to sit for an entrance test where their ability and interest in music will be tested. The parents of these candidates will be interviewed as well to know their level of commitment to SAU. This is to prevent parents from sending their child just to earn money from the scholarship scheme. The scholarship is reviewed based on the student's performance and a performance bonus is also awarded to excellent students. The scholarship will be split into 80:20; in which 20% will be kept as savings for their future and 80% will be given to the parents for their child's schooling expenditure. Seniors students above 17 years old are encouraged to become the contract staff of SAU. Today, SAU has 280 contract staff. Three years ago, the academy only had 130 students which increased to 528 students in 2008.

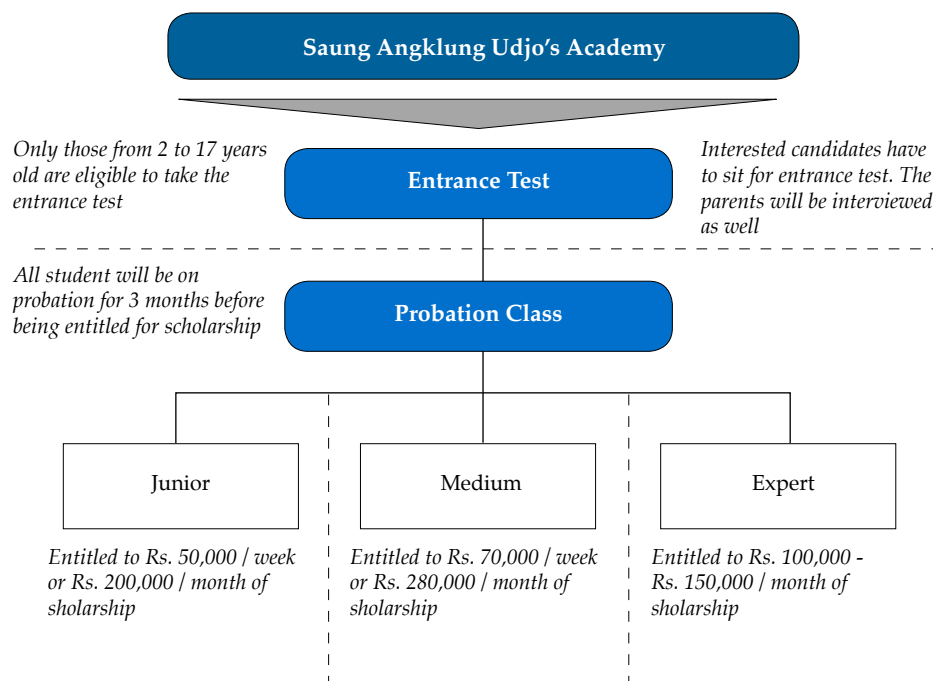


Fig. 4.8: SAU's Academy Structure

Sample of Worksheet (Adapted from <http://www.intracen.org>, 2002)

Worksheet 4.1: Formulating a Common Vision

The following are some questions designed to help formulate a common vision for the CBT organisation:-

1. Understand the organisation

To formulate a vision for an organisation, you first must understand it. Essential questions to be answered include the following:

- a. What is the purpose of the organisation, why has it been set-up?
- b. What value does the organisation provide to society, what are/were the values of the founders?
- c. What is the character of the industry like in which the organisation is operating? e.g. non-profit environment, high government support levels
- d. What does it take for the organisation to be successful?
- e. Who are the critical stakeholders (inside and outside the organisation)?
- f. What are the interests and expectations of the different stakeholders?

Conduct a vision audit

This step involves assessing the current direction and momentum of the organisation. Key questions to be answered include:

- a. Does the organisation already have a clearly stated vision?
- b. What is the organisation's current direction?
- c. Do the key leaders of the organisation know where the organisation is heading and agree on the direction?
- d. Do the organisation's structures, processes, personnel, incentives, and information systems support the current direction?

Target the vision

This step involves starting to narrow in on a vision. Some of the key questions that should be addressed during this step are the following:

- a. What are the boundaries or constraints to the vision?
- b. What critical issues must be addressed in the vision?

Set the vision context

This is where you look to the future, and where the process of formulating a vision gets difficult. The vision of your institution is a desirable future for the organisation. To craft that vision you first must think about what the organisation's future environment might look like.

- a. Categorise future developments in the environment which might affect your vision.
- b. List your expectations for the future in each category.
- c. Determine which of these expectations is most likely to occur.
- d. Assign a probability of occurrence to each expectation.

Develop future scenarios

Having determined, as well as possible, those expectations most likely to occur, and those with the most impact on your vision, combine those expectations into a few brief scenarios to include the range of possible futures you anticipate.

Generate alternative visions

Just as there are several alternative futures for the environment, there are several directions the organisation might take in the future. The purpose of this step is to generate visions reflecting those different directions. Do not evaluate your possible visions at this point, but use a relatively unconstrained approach.

Choose the final vision

Here's the decision point where you select the best possible vision for your organisation. To do this ...

- a. First look at the properties of a good vision, and what it takes for a vision to succeed (including consistency with the organisation's culture and values).
- b. Next, compare the vision you've generated with the alternative scenarios, and determine which of the possible visions will apply to the broadest range of scenarios.

The final vision should be the one which best meets the criteria of a good vision, is compatible with the organisation's culture and values, and applies to a broad range of alternative scenarios (possible futures).

Adapted from : <http://www.intracen.org> 2002

Summary of Step 4:

TOURISM PRODUCT CYCLE	TICK
STAGE 1 : Community Organisation in Initial Phase of CBT	
a. Drawing solely from the talents within the local community	<input type="checkbox"/>
STAGE 2 : Community Organisation As CBT Project Matures	
a. Seeking professional help without sacrificing community structure	<input type="checkbox"/>
IDENTITY ROLES OF CBT ORGANISATION	TICK
1. Empowering women and youth	
a. Creating specific bureau/association	<input type="checkbox"/>
b. Appointment of office bearers	<input type="checkbox"/>
c. Designation of roles and type of activities of each bureau	<input type="checkbox"/>
2. Formulating a common vision but realistic targets	
a. Provide the direction to guide the community	<input type="checkbox"/>
b. Inform the locals about the impact of tourism	<input type="checkbox"/>
c. Formulated the common vision	<input type="checkbox"/>
Example of common vision	
<i>"to preserve the unique cultural heritage of the village by implementing the adaptive reuse of traditional buildings for the enjoyment of visitors without sacrificing the community structure, values and local way of life".</i>	
d. Set realistic targets (consider factors such as level of education, skills and training gaps)	<input type="checkbox"/>
3. Nurturing an anti handout mentality	
a. Encourage self help sense of ownership	<input type="checkbox"/>
4. Establishing a community fund	
a. Setup the community fund (to manage the income & expenditure)	<input type="checkbox"/>
b. Create revolving fund for community	<input type="checkbox"/>
c. Create microcredit facilities	<input type="checkbox"/>

For more references, please visit the following website:-

- <http://www.undp.org/women/publications.shtml>

Develop Partnerships



Step 5

Section B

Step 5

Develop Partnership

As the CBT project evolves into a complex business enterprise, expanding the target market segments is imperative. At this juncture, CBT would have reached the crossroads in which the next path is to build on its competitiveness. Central to its efforts in enhancing competitiveness is the establishment of partnerships with key stakeholders.

The partnership can take 4 forms, namely:

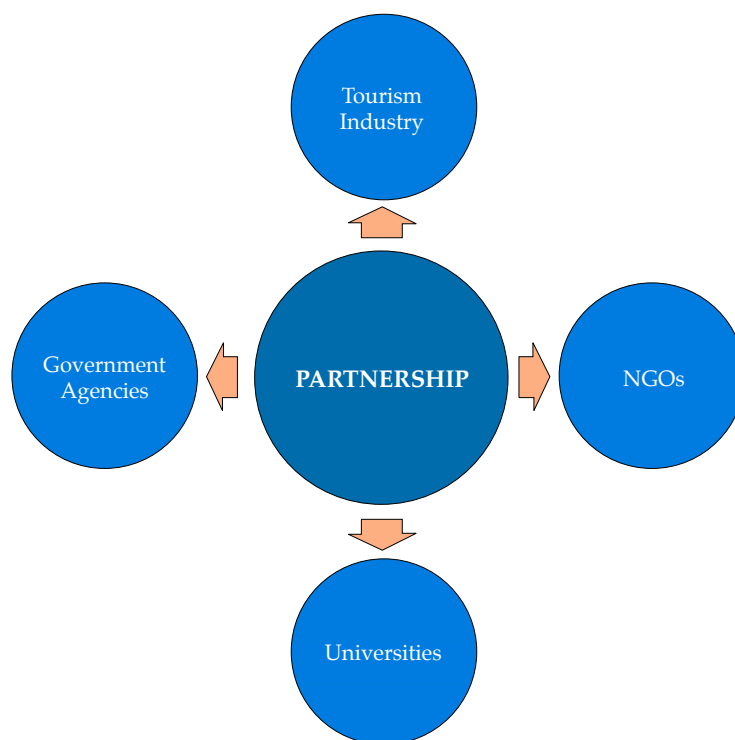


Fig. 5.1: The forms of partnership

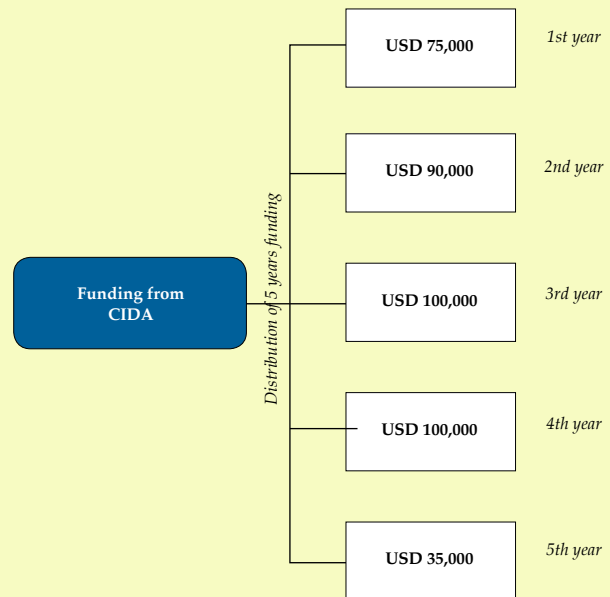
1. Partnership With NGOs

Partnership with international and local NGOs will increase the community's capacity in undertaking conservation projects in which tourism is used as tool (or means to an end). For instance, the Canadian International Development Authority (CIDA) provides funding for the CBT project in Ta Phin, with the aim of preserving the unique but threatened culture of the Red Dao ethnic community.

BOX 5.1:

CIDA and CBT development in Ta Phin Village

The Canadian International Development Agency (CIDA) provided the initial fund for a five year CBT project in Ta Phin Village. The project was initiated in 2002, with the aim of preserving the local culture and to use CBT as a vehicle to reduce poverty. The programme, known as the Community College Partnership Program (CCPP) is managed by the Association of Canadian Community Colleges. Overall CIDA had provided US\$400,000 for the project.



BOX 5.2:

The Nature Conservancy (TNC) and Community Based Ecotourism in Lashihai

Lashihai Homestay, located in Nanyao Village, near the Lashi Lake in northwest Yunnan, China is a community based ecotourism project initiated and managed by Lijiang Xintuo Ecotourism Company. The company is 100% owned by the local community. The project is in collaboration with The Nature Conservancy (TNC), an NGO whose aim is to protect the rich natural biodiversity and local communities. This partnership was first initiated in the year 2000 when TNC was involved in conservation work in northwest Yunnan Province.

The assistance and support given by TNC are as follows;

- Initial funding during the inception of the project (around 20,000 Yuan RMB)
- Capacity building and training such as nature guiding, hospitality skills, business management and English language courses.
- Marketing and promotion (internet-based), linked with TNC's official website.
- Positioning the project as "green" and "responsible" tourism.

TNC funded the development of Lashihai Homestay in Lijiang, China



2. Partnership With Universities

Partnership with universities will educate the local community on the appropriate framework to develop community based projects and equip the organisation with the tools and approaches to improve the quality of the tourist experience. Universities will also bring with them research expertise to analyse changing tourist demand and trainers to conduct capacity building programmes, which had been useful for the development of ethnic tourism at CBT sites such as Ta Phin.

BOX 5.3:

Capacity Building in Partnership with Universities

As official partners to the Ta-Phin Village projects funded by CIDA, 3 universities contributed to the capacity building of the local community, namely Hanoi Open University (HOU), Capilano College and North Island College. The staff and the students from the Canadian and Vietnamese academic institutions worked together to develop modules and deliver training to the local community in Ta Phin Village. The international institutions with a team of 5- 9 persons visited the local community annually for a duration of 3 weeks, while HOU's staff and students trained the local community on an average of 4-6 times a year. The modules taught to the community are:

- Hygienic Preparation of Food
- Homestay Development
- Health Issues, specifically HIV / AIDS awareness
- Sanitation and Maintenance
- First Aid
- Guiding
- Community Tourism Product Development
- Conservation

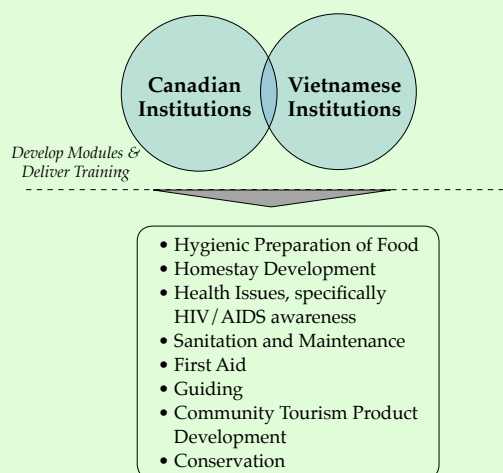


Fig. 5.3: Collaboration between institutions to prepare and deliver training modules

The purpose of the capacity building and training is to educate and impart the necessary knowledge and skills to the local community with the hope that the CBT will be developed in a sustainable manner. HOU also assisted the local community in managing the cash flow of the Cultural and Tourism House, a one stop souvenir centre. Besides that HOU also helped in the preparation of the necessary paper work required to secure funding from government agencies.

3. Partnership With Government Agencies

Partnership with government agencies may fall into the “handout” or “subsidy traps” if the focus is placed on producing results and not empowerment. For such partnerships to be effective, the related government agencies should take a hands on approach by having field officers stationed on site to provide consultancy service to the local community. The Guisi CBT project is a successful model in which government officers have played the role of local champions from the inception of the project. The key to its success is the patience and perseverance in the part of the officers, who set realistic targets for the once impoverished fishing communities.

BOX 5.4:

Guisi - Partnership between Community and Government Agencies

A host of government agencies have been directly involved in the development of the CBT project at Guisi such as the Department of Tourism (DOT), Provincial Planning Office and especially the Provincial Economic Development Office. These agencies used a ‘hands on’ approach by fostering a close rapport with the community and the local tourism industry players from the inception of the project. The related government officers spent 5 years working closely with the community through capacity building programmes, so much so that have been accepted as part of the local community at Guimaras.

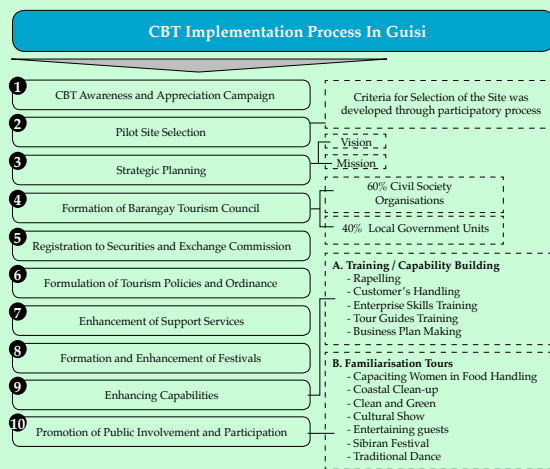


Fig. 5.4: CBT implementation process in Guisi

BOX 5.5:

Government Initiatives

This Seoungueup village is designated as a Folk Village because of its unique cultural heritage. The village consists of around 3,000 thatched roof houses with stone and clay walls where villagers still live in them, although some have added modern amenities. The uniqueness of the thatched roof and the house’s traditional architecture are the main pull factors attracting tourists to the village.

The government provide funds to the local community to maintain the thatched roof of their houses. The purpose of this assistance is to help villages to preserve the original character and identity of Seoungueup Folk Village. Additional funds are also being allocated for the reconstruction the village house’s walls and gates, and also restoring older roads. As a designated heritage site, the villagers are not permitted to arbitrarily change the structural or architectural makeup of the village.



The Jeju state government gave incentives and support for traditional architecture preservation and restoration in Seoungueup Folk Village

4. Partnership With Tourism Industry

Partnership with the tourism industry will be effective if the latter focuses on the marketing and promotion. Even so, CBT organisations should be selective in forging partnership with tour operators because the tourist experiences offered by such projects appeal only to specific market segments such as students and FITs. In this light, CBT organisations should form partnerships with tour operators and ground handlers that have established networks with specialist tour operators at the international level such as Intrepid Travel. However, CBT projects need to conform to the requirements of such operators before any form of partnership could be established.

BOX 5.6:

Footprint's Role in Ta Phin Village

Footprint is a local tour operator based in Ha Noi. As a partner of the local community at Ta Phin Village, Footprint collaborates with the village leaders to create a CBT product that is aligned with the principles of responsible travel. Footprint had formulated a system to equally distribute the economic benefits of CBT to all members of the local community at Ta Phin village. Among its best practice is the rotation plan for homestays and also the possibility for guests to stay at one homestay but take their meals at another homestay.

Footprint has also been actively involved in promotion and acts as the village's mediator for bookings from tourists given that language and (lack of) technology are some of the limitation factors for the local community to deal directly with tourists.

The breakdowns of Footprint's customers to Ta Phin Village are Americans (55%), Australians (20%), Europeans (15%) and Asians (10%). More than 75% stayed for a minimum of 1 night and the rest preferred day visit only.



Tour guides from Footprint have good relations and understanding with the local community of Ta Phin

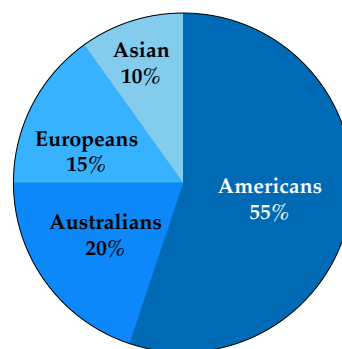


Fig. 5.5: Customer breakdown of Footprint Travel

Summary of Step 5:

1. Partnership with NGOs		TICK
a. To increase the community's capacity in undertaking of conservation project		<input type="checkbox"/>
2. Partnership with Universities		
a. Educate the local community on the appropriate framework to develop CBT projects.		<input type="checkbox"/>
b. Equip the organisation with the tools and approaches to improve the quality of the tourist experience		<input type="checkbox"/>
c. Bring research expertise		<input type="checkbox"/>
3. Partnership with Government Agencies		
a. Field officers stationed on site		<input type="checkbox"/>
b. Monitoring the project		<input type="checkbox"/>
4. Partnership with Tourism Industry		
a. Focus on marketing and promotion		<input type="checkbox"/>
b. Establish network with specialist tour operators at the international level such as Intrepid Travel		<input type="checkbox"/>

For more references, please visit the following websites:-

- <http://www.regionalpartnerships.umn.edu/public/trtmanual.pdf>
- [http://www.ifc.org/ifcext/enviro.nsf/Content/SocialResponsibility_Highlights_HowToBriefs%5C\\$FILE%5CBrief2_StimulatingProducts.pdf](http://www.ifc.org/ifcext/enviro.nsf/Content/SocialResponsibility_Highlights_HowToBriefs%5C$FILE%5CBrief2_StimulatingProducts.pdf)
- <http://www.sdp.gov/sdp/initiative/c15388.htm>



The top view of the traditional snake kiln used at Shui-Li Snake Kiln Ceramic Park, Nantou, Chinese Taipei.

Adopt an Integrated Approach



Step 6

Step 6

Adopt an Integrated Approach

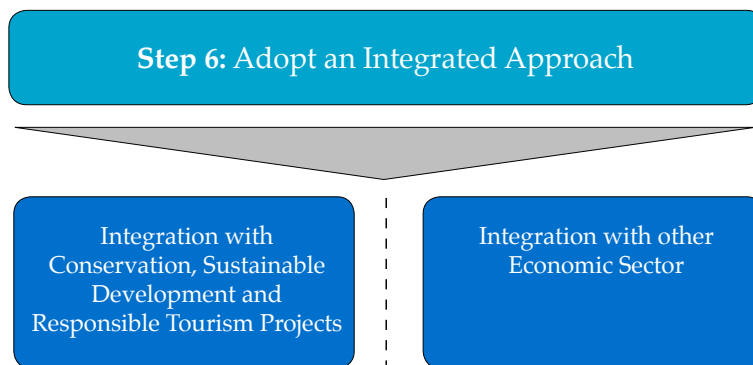


Fig. 6.1: The components of Step 6

Since tourism is a volatile business, it should not be regarded as the panacea to the economic immaturity of rural communities. Nonetheless, tourism as a development catalyst has proven to be effective especially if it is well integrated into the overall development strategy and approach.

There are 2 forms of integration, namely:

1. Integration with Conservation, Sustainable Development and Responsible Tourism Projects

For CBT projects initiated by NGOs, there are often spin offs in the form of conservation projects which will provide employment as well as contribute to the overall well being of the community. In fact many of the NGO initiated CBT projects are essentially conservation or sustainable development projects in which tourism is used to compensate for the loss of potential income by not felling and selling timber etc. This is evident in the case of Misowalai, Ta-Phin and Lashihai Homestay, but will only provide short to medium term employment opportunities for the locals.



Left:
The traditional snake kiln still used for making ceramic pottery



Top:
Master Craftsman at Shui-Li Snake Kiln

BOX 6.1:

Revitalisation of Sunset Industry through Tourism at Snake Kiln Ceramic Park

The Shui-Li Snake Kiln was established in 1927 is the oldest and most traditional snake kiln still operating in Chinese Taipei. The kiln is more than 30m. in length and the pottery releases a spectrum of colour once charcoal ash falls on it, creating a spectacle that modern kilns are unable to copy. By 1974, the pottery industry went into decline due to the rise of the plastic industry, and today only Shui-Li Snake Kiln remains of the original 6 kilns.

From the 1980s, the owner transformed the business model of the kiln's operation to focus on tourism by carrying out restoration works, establishing an exhibition hall and museum, adding interactive pottery classes for tourists and improving guiding and interpretation. In addition, 2 modern kilns were constructed to handle bulk production but the original kiln is used as a "show kiln". As a result, more than 200,000 tourists are attracted to the ceramic park annually and one of Chinese Taipei's iconic cultural heritage has been well preserved. The Snake Kiln Ceramic Park is a testimony to the role of tourism in revitalising a sunset industry by marrying commercial activity with cultural preservation and community participation.

2. Integration with Other Economic Sectors

Another dimension of the CBT that is seldom highlighted is its role as a "training ground" for the local community to learn and master business skills such as managing an operation, financial management and marketing and promotion techniques etc. The skills that the local community learn will prepare them to undertake non-tourism projects that also require good organisation, sound understanding of business and interpersonal skills.

Already the local community at Misowalai have been entrusted to be the contractor for the forest rehabilitation project by the government, which managed to create employment opportunities for the local women (refer to Step 4, Box 4.1). Likewise, tourists being entertained by the cultural performances at Saung Angklung Udjo are seldom told that the centre produces 19,600 angklung every month, which are produced at 11 surrounding clusters (villages). Managing such a complex production line in tandem with the tourism attraction at Saung Angklung Udjo requires an organisation that is business savvy with a sound understanding of the supply chain in cultural tourism (refer to Step 1, Box 1.5). In Toronto, Canada the success of the retail business in St. Jacobs County was triggered by the "magnetic pull" of the Old Order Mennonite Community (Box 6.2).

Bottom:
Mennonite woman selling bread at Farmer's Market using horse buggy



BOX 6.2:

Leveraging on the Old Order Mennonite's Iconic Appeal to Boost Growth in the Retail Sector

St. Jacobs County, which is located 75km from Toronto, Canada, receives about 1.5m tourists annually, who are drawn to its idyllic and pastoral landscape and lifestyle. Tourists are also intrigued by the Old Order Mennonite community who still come to town on horse and buggy, and still live in the traditional way. St. Jacobs County is able to leverage on the appeal factor generated by the Mennonite community to develop a thriving tourist destination in which there more than 100 shopping, lodging, dining and theatrical cultural attractions.

The tourism industry has created significant employment opportunities especially in the retail and service sector. Most of the locals who are working in this business are women and young adults, not only as employees but also as owners and operators of small businesses. In addition the Mennonite community are able to enjoy the economic spinoff of the thriving tourism industry by supplying hotels and accommodation with their farm produce. While the Mennonite community still resents the attitude of a small minority of tourists who treat them like "exhibits", they are now at ease and enjoy the economic possibilities in the other sectors, created by tourism.

Summary of Step 6:

1. Integration with conservation, sustainable development and responsible tourism projects	TICK
a. Spin offs in the form of conservation, sustainable development and responsible tourism	<input type="checkbox"/>
b. Provide employment opportunities for locals	<input type="checkbox"/>
2. Integration with other economic sectors	
a. a "training ground" for the local community	<input type="checkbox"/>
b. prepare local community to undertake non-tourism projects	<input type="checkbox"/>
c. provide stable and better paying jobs for locals	<input type="checkbox"/>

For more references, please visit the following websites:-

- <http://ic.ucsc.edu/~kholl/envs190/kiss2004.pdf>
- <http://www.communityforestryinternational.org/northeastindia/pdfdocuments/mawphlangecotourismproposal.pdf>



The preservation of traditional architecture at Seongeup Folk Village, Jeju funded by the government

Plan and Design Quality Products



Step 7

Step 7

Plan and Design Quality Products



Fig. 7.1: The components of Step 7

Having formulated a general framework for the development of tourism with the other economic sectors, the next step is to plan the potential tourism products in a comprehensive manner.

ACTION 1: Formulation of CBT Action Plan

This may require the formulation of a CBT Action Plan, in which the community decides on the various actions that are required to create a distinct tourism experience. The Action Plan, will firstly, entail a detailed inventory of the tourism resources within the area/village and along the so-called corridors leading towards major tourism attractions in the surrounding areas. In this light, appropriate techniques such as the Product Inventory Matrix and/or Product Competitiveness Index could be used to assist the evaluation.

The aim of the product inventory is to evaluate the quality of the tourism resources, and subsequently, to identify iconic attractions and activities that could be developed into core tourism products. By the same token, resources and attractions with moderate appeal will only be developed as supporting products.

Parts of the proposals in the CBT Action Plan should be presented spatially using plans, maps and illustrations. Site mapping could be carried out by involving the locals to plot out the locations for

facilities such as interpretive centre, performance stage, jetty, parking, toilet etc. To save cost, the CBT organisation should approach universities and volunteer organisations to lend their expertise in the preparation of the Action Plan and the construction of tourist facilities. Universities are always willing to contribute towards CBT projects while volunteers through organisations such as Raleigh International have also been contributing actively in the development of CBT projects.

Components	Sub Components	1	2	3	4	5
Uniqueness	Iconic					
	Popularity					
Activities	Variety					
	Quality					
Accessibility & connectivity	Road access					
	Public transport					
	Signboard					
Basic facilities	Parking					
	Visitor Information Centre					
	Toilet					
	Food outlet					
	Souvenir outlet					
	Internal signage					
Interpretation facilities	Interpretation centre					
	Exhibition Materials					
	Specific site brochure					
Accommodation facilities	Chalet					
	Camping site					
Maintenance	Physical structure					
	Cleanliness					
	Landscaping					
Service Quality	Front desk					
	Guiding					
	Security					
Marketing & Promotion	Brochure					
	Guide book					
	Website					
Total Audit Rate						
RANKING						

Note:
5: Excellent
4: Good
3: Moderate
2: Poor
1: Very Poor

Example of Product Inventory Matrix

BOX 7.1:

Volunteer Tourism at Misowalai Homestay

Raleigh International has been involved in volunteer tourism all over the world by making arrangement for volunteer groups to support community and conservation work. Misowalai Homestay has been receiving volunteers from Raleigh International for the past 7 years. In 2007, Raleigh International sent 74 full-time volunteers to work at the Tungog Rainforest Eco-Camp (TREC) at Misowalai which is almost completed. Despite its name, the experience is actually a two way process in which volunteers also learns construction and carpentry skills from the locals. In addition, the volunteers are given exposure to the local culture.

Raleigh International volunteer being shown how to properly use a hammer by a local



Among others, the Action Plan should cover the following aspects:

1. Product Development

Product development should focus on developing and showcasing the core products to differentiate the village/community from other tourism destinations. An iconic feature such as a National Park or World Heritage Site in the vicinity could be the USP, and guided trekking from the village to and within the Natural Park/World Heritage Site could then be developed as the core tourism product. It should be stressed that the village or community by itself may not have the appeal or iconic value to be developed as the core product, hence the importance of leveraging off the other attractions in the surrounding areas. Ideally, the village/community should be developed as part of a nature based tourism corridor or cultural tourism corridor.

2. Destination/Leisure Management

Destination/leisure management should include the provision of adequate tourist infrastructure and facilities, good interpretation and high level service quality with the aim of facilitating seamless and enjoyable travel.

Good destination management will ensure that the following conditions are created for the enjoyment and comfort of tourists:

- Ease of making enquiries, arranging for the service of guides, booking tours and forward reservations.
- Seamless travel with minimal delay at public transport terminals, check in/ check out counter, pre booked excursions and tours, room service etc.
- High level of comfort and safety at public transport terminals, transportation vehicles, accommodation and other tourist facilities.
- High service quality offered at the front desk, housekeeping, room service and by tourist guides.
- Warm hospitality and "going the extra mile" attitude.

Example of Tourism Corridor



The adoption of best practice in destination management will help create a distinct product that offers high quality tourist experience. The product should offer the following experience:-

a. Authenticity

BOX 7.2:

Interactive Interpretation Enhances Tourist Experience - Shui-Li Snake Kiln

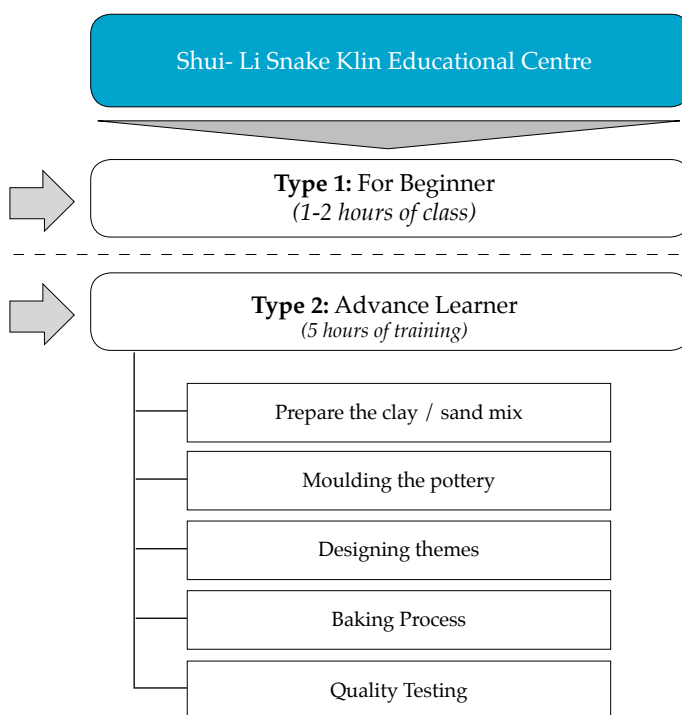
The Shui-Li Snake Kiln includes an educational centre where visitors are given the opportunity to make their own pottery using the traditional method, under the watchful eye of local pottery masters. There are 2 types of pottery classes. The first type of pottery class is for beginners, who spend between one to two hours to experience pottery making for the sake of enjoyment. This activity is normally offered during weekends and public holidays. The second pottery class is for those who have basic skills and want to master the art of traditional pottery through the careful supervision of the master craftsmen.

There are 4 master craftsmen cum trainers and the five hours lessons are divided into:

- Preparing the clay / sand mix
- Moulding the pottery
- Designing themes
- Baking process
- Quality testing



The local pottery masters also perform interpretation to visitors



*Fig 7.2
 Types of classes taught
 in Shui-Li Snake Klin
 Educational Centre*

b. Educational



"Hands on" educational courses for students and volunteers

BOX 7.3:

Misowalai Homestay - Educational Programme For Students and Volunteers

The Misowalai Homestay offers "hands-on" educational programmes for students and volunteers who are interested in contributing to sustainable conservation and socio-economic development. The content of the edutourism programme are as follows:

Misowalai Homestay Edutourism Programme

- 1 Introductory forest safety skills and jungle survival course
- 2 Forest habitat restoration basic training course
- 3 Support the development of nature interpretation trails and building work
- 4 Exchange knowledge and technology

Fig 7.3: Misowalai Homestay Edutourism Programme

- Introductory forest safety skills and jungle survival course - covers aspects of local survival techniques and emergency procedures and teach the participants how to avoid any dangers in the rainforest
- Forest habitat restoration basic training course - equip students or volunteers with the skills and knowledge of how to deal with issues they may face and how to make the whole jungle experience comfortable and enjoyable
- Support the development of nature interpretation trails and building work within the ecotourism ventures, and some basic wildlife surveys
- Exchange knowledge and technology by giving the opportunity for students or volunteers to teach the local community IT skills and the English language whilst learning about the local culture.

c. Entertaining

BOX 7.4:

"Bamboo Afternoon Performance" - A Highly Entertaining Experience!

The main attraction at Saung Angklung Udjo is the evening performance popularly known as the "Bamboo Afternoon Performance" which is very entertaining. The two hours, daily evening performance has four different parts.

Part 1

The first part of the performance is very charming and brimming with innocence since it is performed by children as young as 3 years old.

Part 2

This is followed by Part 2 in which the Angklung Orchestra and Sundanese traditional dance are performed by teenage students.

Part 3

The third part is interactive in nature, in which tourists will get the opportunity to learn and play simple music notes using the Angklung.

Part 4

The climax of the show is the final part when tourists are persuaded to get on stage to dance together with the children, accompanied by the traditional band playing Indonesian folk songs.



Tourists enjoying themselves during the climax of the afternoon performance



Angklung Orchestra Performance

d. Enjoyment

BOX 7.5:

The Kinabatangan Boat Cruise - Borneo Experience To Be Enjoyed At A Leisurely Pace



Early morning river cruise

The river cruise along the Kinabatangan River in early morning provides the opportunity for tourists to observe wildlife in its natural setting. The Kinabatangan Flood Plain is home to wildlife such as the proboscis monkeys, orang utan, pigmy elephants, crocodiles, and hornbills. Usually tourists have to trek along hot and humid trails to be able to see wildlife in their natural habitats. In contrast, the river cruise is a leisurely and yet fulfilling experience which can be enjoyed by all age groups.

e. Memorable

BOX 7.6:

"Whale Watching Experience at Kaikoura"



Whale says "Goodbye"

For a fee of NZD 140/person, tourists are taken on a high speed catamaran to watch Giant Sperm Whales in their natural habitat off the coast of Kaikoura. The boat ride from the jetty may take up to 30 minutes and along the way, the vessel moves like a 'cradle', and even motion sickness pills may not work when the waves are high. Locating the whales is just a start to this awesome experience, and once sighted, the mumber of excitement transcends into a frenzy of cameras and video cams trying to record the amazing scene while being thrown all over the catamaran by the strong waves. The climax of the "show" is when the whale dives into the water before it appears a few seconds later, but this time showing only its tail as it is pointed proudly to the sky, as if to wave goodbye. A memorable experience indeed!

3. Interpretation and communication

Interpretation and communication can be in a form of visual interpretation and oral presentation. Visual presentation can be communicated through the setting up of an interpretive centre and interpretive trails. Meanwhile oral interpretation will require the training of the local youths to be certified as guides. To satisfy changing tourist demand, interpretation should create an interactive

relationship between hosts and guests.

4. Service Quality

To enhance service quality, front liners should be sent for training to enhance their operational, and communication skills. The capacity building and training programmes should not be carried out in an ad hoc manner but should be properly planned according to specific phases.

Summary of Step 7:

ACTION 1: FORMULATING OF CBT MASTER PLAN	TICK
a. Detail inventory of tourism resources	<input type="checkbox"/>
b. Apply techniques (e.g. Product Inventory Matrix/ Product Competitiveness Index)	<input type="checkbox"/>
c. Evaluate tourism products	<input type="checkbox"/>
d. Proposal (presented using plans, maps and illustrations)	<input type="checkbox"/>
e. Approach expertise from universities or volunteers in preparing the Master Plan	<input type="checkbox"/>
CONTENTS OF CBT MATER PLAN	TICK
1. Product Development	
a. Develop and showcase core product	<input type="checkbox"/>
b. Linkages with other attractions in the surrounding areas	<input type="checkbox"/>
2. Destination/Leisure Management	
a. Adequate tourist infrastructure, facilities, good interpretation and high level service quality	<input type="checkbox"/>
b. Provide authentic experience	<input type="checkbox"/>
c. Provide educational experience	<input type="checkbox"/>
d. Provide entertaining experience	<input type="checkbox"/>
e. Enjoyable experience	<input type="checkbox"/>
f. Provide memorable experience	<input type="checkbox"/>
3. Interpretation and Communication	
a. Visual presentation – interpretive trails/centre	<input type="checkbox"/>
b. Oral presentation – well-trained guides	<input type="checkbox"/>
c. Interactive relationship between host and tourists	<input type="checkbox"/>

4. Service Quality

- a. Training for front liner to enhance operational and communication skills



For more references, please visit the following websites:-

- http://ec.europa.eu/enterprise/tourism/docs/studies/towards_quality_tourism_rural_urban_coastal/iqm_rural_en.pdf
- http://ec.europa.eu/enterprise/tourism/docs/studies/evaluating_quality_performance/qualitest_manual_en.pdf



Young Black Hmong ladies busy preparing handicrafts during their leisure.

Identify Market Demand And Develop Marketing Strategy



Step 8

Step 8

Identify Market

Demand and Develop

Marketing Strategy

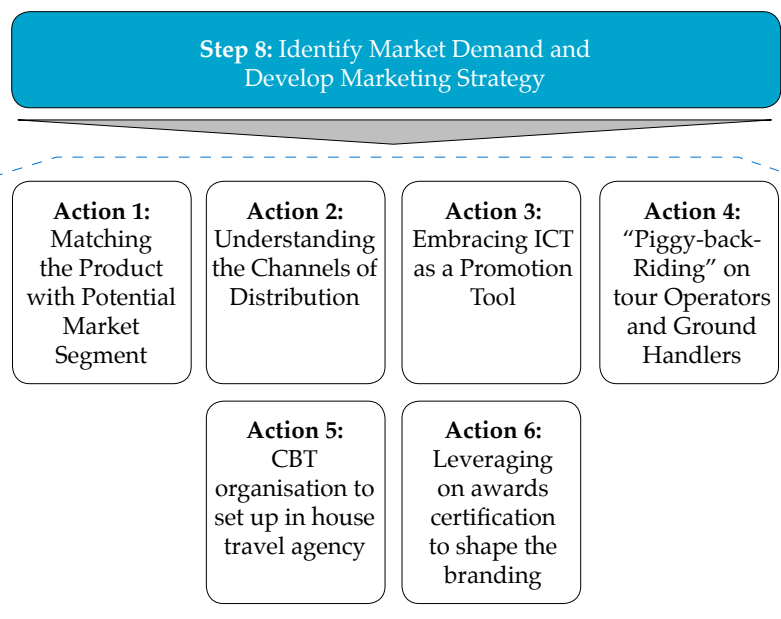


Fig. 8.1: The components of Step 8

"Do not print and distribute brochures / pamphlets before the target markets are identified and marketing strategies put in place"

In many CBT projects, especially those initiated by government agencies, too much emphasis is given to promotion at the expense of effective marketing. As such, brochures and pamphlets are regularly printed, and more often than not, distributed to the wrong target markets.

The marketing strategy for CBT should be formulated based on the following principles :

1. Matching the product with the potential market segments.
2. Understanding the channels of distribution
3. Embracing ICT as a promotion tool.
4. "Piggy-back-riding" on tour operators and ground handlers
5. Setting up an in house travel agency

ACTION 1:

Matching the Product with the Potential Market Segment

Based on its USP, the CBT organisation should determine who will be attracted to its product. A product that is rich in educational content should appeal to students while another product that offers adventure should attract "hard ecotourists". In the case of CBT projects initiated by NGOs, the conservation/sustainable development elements of the project should attract the so-called green tourists.

BOX 8.1:

Know The Market Segment In Lashihai Homestay



American tourists staying at Lashihai homestay to learn culture and teach English to children in the school

FITs are the main market segment served by the Lashihai Homestay in Lijiang, backpackers comprise the bulk of the FITs, who are keen to experience the local culture and way of life. However, it is not only a one way relationship as the backpackers are often hired to teach English to the local community in exchange for a bed and meals. Since 90% of visitors to Lashihai are Westerners, it is a sensible move by the local community to improve their proficiency in foreign languages.

ACTION 2:

Understanding the Channels of Distribution

CBT projects such as the Lijiang or Ha Noi will not be sold by mainstream tour operators. Therefore it is not worth the effort nor money to sell such packages at the major tourism shows such as ITB Berlin or the World Travel Mart (WTM) in London, which cater for the mass tourism segment.

Instead they should leverage on the networking within the “green tourism” or “responsible tourism” circuit through their association with NGOs and specialist tour operators. Conforming to the principles of Responsible Tourism, for instance, will increase the product’s appeal to this market segment given that NGOs and specialist tour operators such as Intrepid Travel will be the ground handlers for such products.

ACTION 3:

Embracing ICT as a Promotion Tool

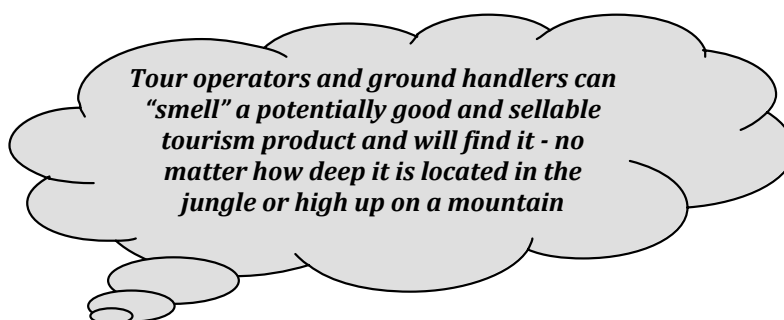
Brochures and pamphlets will always end up in the dustbin, and will only make the printers rich. The use of website, portal, podcast, Facebook, travel blog are more effective as promotion tools for CBT projects. In view of this, the CBT organisations should invest in setting up the hardware (computers and Internet connection) and software (training local youths) to carry out e booking and e promotion etc.

ACTION 4:

“Piggy-Back-Riding” On Tour Operators And Ground Handlers

As a CBT project matures and begin to attract a steady stream of visitors, tour operators and ground handlers are bound to offer their services to include the product in their tour packages. This is an

opportunity that should not be missed given that the tour operators and ground handlers have excellent networking with their international counterparts. By doing so, the CBT organisation can then focus its attention on the overall management and product development knowing that its partners will take care of the marketing and promotion. The only worry is that the distribution of profits may not be equitable, which in turn, may lead to accusations of exploitation etc. In the past, there are tour operators who even resorted to unethical practice like signing an MOU with a CBT organisation to be the sole promoter of its product. This danger can be avoided by a creating a "pool of partners" to prevent monopoly and to create competition among the partners.



ACTION 5: CBT Organisation to Set Up In House Travel Agency

Once the community has progressed in terms of its management, interpretation and communication skills, it may want to set up its own travel agency. This progression is inevitable because the local youths will soon be disillusioned if there is no opportunity to move on along a career path (refer Box 8.2). Setting an in house travel agency will ensure sustainability in terms of local control besides nurturing the spirit of entrepreneurship among the youths (refer Box 8.3).

BOX 8.2: From Tour Guide to CEO



Mr. Kauahi Ngapora
CEO of Whale Watch

Kauahi Ngopora started his career with Whale Watch, the company that operates the whale watching industry at Kaikoura, as a tour guide. Despite what he humbly described as his "shy personality", Kauahi managed to rise to the highest level of Chief Operating Officer of Whale Watch, through diligence and the high quality and professionalism of his work. The tourism industry at Kaikoura allows outstanding talents to move up the career path, which is crucial for the long term sustainability of CBT projects. Unfortunately, the majority of those employed in CBT projects in developing countries are stuck in their positions, which will lead to resentment and disillusionment.

BOX 8.3:

Set Up Community - Owned Ecotourism Company

The Lijiang Xintuo Ecotourism Company is a community-owned ecotourism company supported by The Nature Conservancy (TNC) and government agencies to help preserve minority cultures and promote sustainable tourism in parts of the Yunnan province threatened by overdevelopment. This company is the first farmer cooperative travel company owned by 24 shareholders, all local Naxi families from the Nanyao Village in Lashihai Lake, Lijiang. The setting up of the company has provided new jobs and better income for the local Naxi and Yi ethnic minorities, many of whom have been trained and certified as guides. The company also operates and manages the Lashihai Homestay and 10% of the company's profit is given back to the Community Development Fund.



Lily Zhang
*Manager of Community owned
 tour company*

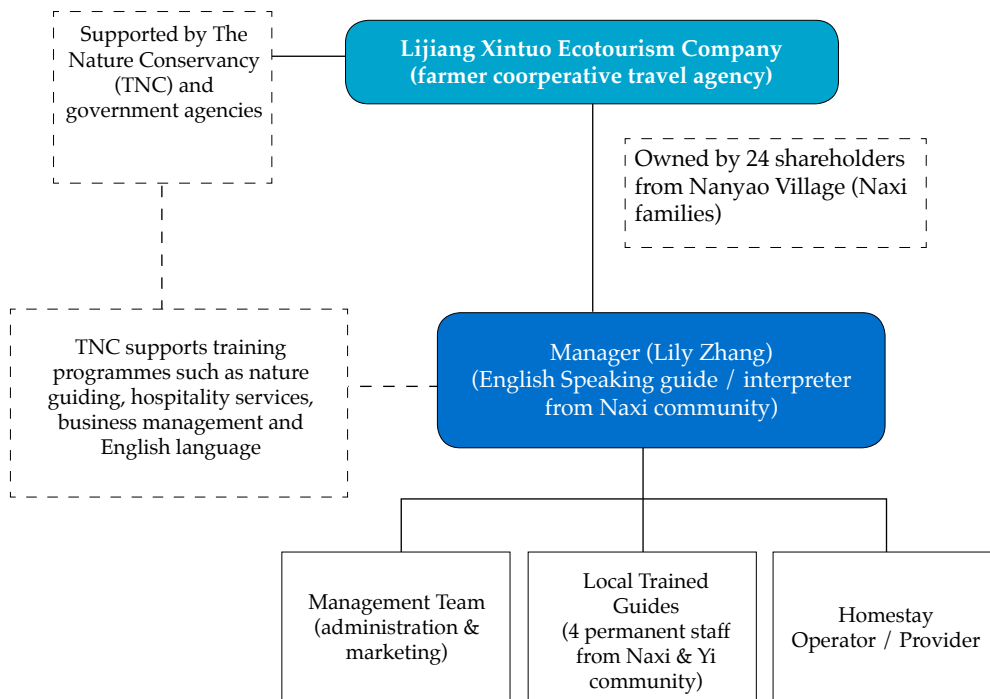


Fig 8.2: Organisation Chart of Lijiang Xintuo Ecotourism Company

ACTION 6:

Leveraging On Awards Certification to Shape the Branding

Certifications such as Green Globe/Green Globe Community (Kaikoura) will communicate the positive values of the CBT projects to tourists such as their commitment to environmental protection, preservation of local heritage etc. Likewise, awards won by the community such as the Responsible Tourism Award will differentiate the product from the run of the mill operations. In turn, these positive messages will help shape the branding of the product with "buy in" from tourists as compared to the countless but empty taglines created by advertising firms.

BOX 8.4:

"I Walked the Kuku Yalanji Dreamtime Tour"

Kuku Yalanji Dreamtime Walks has won 8 awards for its outstanding achievement in developing iconic tourism products such as the Aboriginal Guided Rainforest Walks of Mossman Gorge Park. The product is certified by the Ecotourism Certification and Accredited Tourism Business Australia and in 2008 was the winner of the Tourism Tropical North Queensland Heritage, Cultural and Indigenous Tourism Award. It is also the first Queensland tour operator to achieve certification under the Australian government's Respecting Our Culture (ROC) programme. This indirectly increased the visibility of the product at the national and international levels that resulted in a sudden influx of tourists including former US President, Bill Clinton and celebrities such as Bridget Fonda.



One of the awards won by Kuku Yalanji Dreamtime in 2008

Summary of Step 8:

ACTION 1: MATCHING THE PRODUCT WITH THE POTENTIAL MARKET SEGMENTS	TICK
a. Determine the potential market segments	<input type="checkbox"/>
b. Match product and market segments	<input type="checkbox"/>
ACTION 2: UNDERSTANDING THE CHANNELS OF DISTRIBUTION	TICK
a. Identify the channel of distribution	<input type="checkbox"/>
b. Network within "green tourism" and "responsible tourism operators"	<input type="checkbox"/>
ACTION 3: EMBRACING ICT AS A PROMOTION TOOL	TICK
a. Carry out e-booking/online reservation	<input type="checkbox"/>
b. Carry out e-promotion	<input type="checkbox"/>
c. Build own website, blog, forum etc.	<input type="checkbox"/>
d. Invest in setting up hardware (computer and internet connection)	<input type="checkbox"/>
e. Invest in setting up software (training local youths)	<input type="checkbox"/>
ACTION 4: "PIGGY-BACK- RIDING" ON TOUR OPERATORS AND GROUND HANDLERS	TICK
a. Identify potential tour operators and ground handlers	<input type="checkbox"/>
b. Network with international counterparts such as Intrepid Travel	<input type="checkbox"/>
ACTION 5: SETTING UP AN IN HOUSE TRAVEL AGENCY	TICK
a. Set up in house travel agency	<input type="checkbox"/>
b. Nurture the spirit of entrepreneurship among youths	<input type="checkbox"/>
ACTION 6: LEVERAGING ON AWARDS CERTIFICATION TO SHAPE THE BRANDING	TICK
a. Improve quality of product to win awards	<input type="checkbox"/>

For more references, please visit the following websites:-

- http://www.nacso.org.na/dwnlds/MET_policy_on_CBT_development.pdf
- http://www.met.gov.na/publications/research/rdp_0004.pdf

Implement and Monitor Performance



Step 9

Step 9

Implement and Monitor Performance

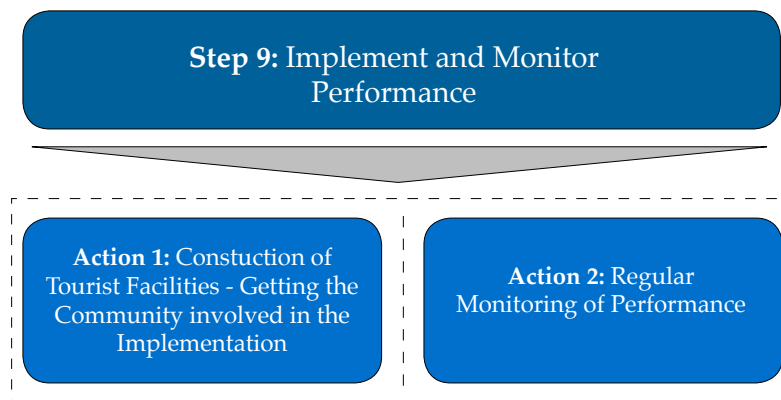


Fig. 9.1: The components of Step 9

ACTION 1: **Construction of Tourist Facilities - Getting the Community Involved In the Implementation**

Project implementation is another activity that can empower the local community. Having secured the funds to construct tourist facilities, the conventional approach is to appoint building contractors to carry out the actual construction. This is to ensure that the construction is carried out in a professional way to meet industry and safety standards etc.

However the local community can also participate actively in the implementation stage by being involved in the construction of such facilities. Although the construction period may take a longer time, the local community will be empowered and will acquire new skills or enhance their existing skills by being involved in the construction process from the beginning until completion.

This approach is successfully applied at Misowalai Homestay and the achievement should not be measured in terms of physical development i.e. a major tourist facility, the Eco Camp, but the stronger sense of ownership and community spirit that was cultivated throughout the community's direct involvement in the construction process



Local guide at Misowalai Homestay explaining forest restoration programme to visitors.

BOX 9.1:

Do It Yourself Eco-Camp



*Tungog Rainforest Eco-Camp in
Misowalai Homestay*

The idea for the Rainforest Eco-Camp was mooted in 1997 but the application was only given approval by the Kinabatangan Forest Department in 2004. The local cooperative, KOPEL, was given the job of constructing the Eco-Camp, who then hired the locals as workers. The completion of the Eco-Camp is expected to be in late 2009. Although the construction period took a longer time compared to the conventional approach, the construction process brought the locals together and strengthened their camaraderie and sense of ownership. With the help of government agencies and former loggers turned conservationists, the community was meticulous in its planning to the extent of identifying trees that need to be preserved. The project also allows volunteers from countries such as Germany and United Kingdom to be part of the construction team.

ACTION 2:

Regular Monitoring Of Performance

To ensure the sustainability of CBT projects, monitoring should be integrated into the whole planning and implementation process. All too often, monitoring is seldom carried out making it difficult for the organisation to take further actions to improve the quality of the product.

It is essential that monitoring does not only measure the success and gaps in terms of monetary value but also include non-monetary gains such as pride in the local community, sense of ownership, increase self-esteem and etc. In most of the case studies, it is the non-monetary gains that are valued more by the local community than the financial benefits.

Worksheet 9.1: Monitoring Indicators to Measure CBT Performance

The following are some monitoring indicators for community based tourism:-

Effects of tourism on community	% of locals who believe that tourism has increased their: <ul style="list-style-type: none"> • Pride in local community • Sense of ownership • Self esteem • Social cohesion • Confidence level • Communication skills • Relationship with outsiders • General knowledge • Specialised skills
	% of locals who believe that tourism has positively changed their lifestyle / surrounding
Local community participation	% of goods and services supplied by local community
	Employment of local community in tourism operations (numbers / income level)
Product Quality	% of tourists who are satisfied with the environmental / cultural experiences
Achieving equitable distribution of tourism funds/ benefits across the community	The amount of funding acquired by the community for: <ul style="list-style-type: none"> • General • Signage • Marketing • Infrastructure
	Number and type of development

	programmes given to the local community (education, training, health, natural resource management, conservation, etc.)
Professional and personal development	% of locals who are happy with their career path in tourism
	Frequency of training programmes and level of participation
Operation and support of community based enterprises	Number of participants making use of incentives or programmes for SMEs
	Number of participants involved in tourism related businesses (e.g. accommodation providers, catering, tour guiding, transportation, tour operation and etc.)
Environmental management systems and environment initiatives	Training of participants on environmental issues
	<p>Application of environmentally friendly technologies and techniques (% of participants)</p> <ul style="list-style-type: none"> • Water saving techniques or devices • Energy • Recycling: glass, paper and plastic • Green purchasing

Sample of Worksheet (*Adapted from Canadian Universities Consortium, 2000*)

Worksheet 9.2: Developing a Monitoring Plan

The following are the steps in developing a monitoring plan for CBT organisation:-

<p>1. Develop Monitoring Objectives</p> <ul style="list-style-type: none"> - To identify specific goals to be achieved through the monitoring programme and can also help achieve the goals outlined in a tourism plan. - Below is the list of some examples monitoring objectives that could be used at the community level: <ul style="list-style-type: none"> • Involve as many local people as possible in making decisions regarding monitoring. • Develop a monitoring programme that looks at the community holistically to include the socio-cultural, economic, ecological and physical aspects of the community. • Develop a monitoring programme that can be managed by local people. • Monitor the selected impacts on a regular basis.
<p>2. Determine Boundaries of the Area to be Monitored</p> <ul style="list-style-type: none"> - After deciding what is to be achieved through the monitoring programme, the limits of the area to be monitored must be established. - These limits will include the physical boundaries of the community, any ecosystems or special areas contained within it, community administrative limits and any other factors that determine these boundaries.
<p>3. Identify Community Attributes</p> <ul style="list-style-type: none"> - After the boundaries have been identified the next step is to consider the attributes or assets within the community which the community make it special or which conserve or protect. - This is a potentially large list as there are probably many things that a community wants to protect. - It is necessary to identify features in the community that tourists will view as attractions and consider conserving or protecting them. - This list could also include such things as special festivals,

religious ceremonies or unique local customs that are valuable to both tourists and community members.

- While the list of valuable attributes or features is being made, any forces which could affect them should be noted.

4. Identify Potential Impacts

- Generally the impacts of tourism fall into three categories: socio-cultural, economic and ecological or physical.
- Each community should determine which ones are likely to apply, given the community's area, population and the type of tourism it offers.
- The following are some positive impacts (benefits) that tourism may cause:-
 - Conservation of important natural areas.
 - Conservation and/or protection of valued historic sites or artefacts.
 - Improvement to environment quality.
 - Infrastructure improvement.
 - Conservation of cultural heritage
 - Increased employment opportunities.
 - Increased personal and family incomes
 - Improvement in the local standard of living.
- There can be numerous negative impacts of tourism if the community experiences rapid or long term change.

5. Prioritize Impacts

- A set of criteria can be used to decide which impacts need to be monitored first.
- Three examples of potential criteria that could apply at the community level are explained below:-
 - a. **Chance of occurring** – The possibility that an impact will result from tourism.
 - b. **Potential degree or frequency of impact** – If there is a possibility of an impact, its seriousness should also be determined.
 - c. **Ease of monitoring**
- Each impact should be analyzed in terms of these or other specific

<p>criteria.</p> <ul style="list-style-type: none">- The impacts can then be prioritized according to which ones seem the most important based on the combination of criteria.
<p>6. Identify Potential Indicators</p>
<ul style="list-style-type: none">- The next step is to decide which indicators can best measure these impacts.- Indicators have to be selected so that they are credible, efficient and useful to decision makers.- Consider the following when deciding which indicators to monitor:-<ul style="list-style-type: none">• Availability of existing data• Easy to train local person in data collection methods• Reliability• Relates to community tourism vision/plans• Ease of data collection• Ease of analysis• Easy to understand the results• Cost
<p>7. Collect Data</p>
<ul style="list-style-type: none">- Once the indicators have been selected, the next step is to decide on the most appropriate methods of collecting the data.- First find any existing data.- However, if no data is available, it is best to consult a professional on how to monitor the indicator.- Data gathered over a long time is essential for evaluating certain impacts.- How often data will need to be collected depends on the indicator – it may be seasonal, annual or more often.
<p>8. Evaluate the Monitoring Data</p>
<ul style="list-style-type: none">- Evaluation of the monitoring data should help to assess if a community's tourism goals and objectives are being accomplished, and assess the impacts of tourism activities on the destination's resources.- An evaluation needs to be done within the overall economic, environmental, political, social and cultural context of the community.

Adapted from: Canadian Universities Consortium, 2000

Summary of Step 9:

ACTION 1: CONSTRUCTION OF TOURIST FACILITIES GETTING THE COMMUNITY INVOLVED IN THE IMPLEMENTATION	TICK
a. Secured the funds to construct tourist facilities	<input type="checkbox"/>
b. Involved or empowered community in the construction of tourist facilities	<input type="checkbox"/>
c. Local community will enhance the existing skills and acquire the new skills	<input type="checkbox"/>
ACTION 2: REGULAR MONITORING OF PERFORMANCE	TICK
a. Create indicator to monitor the performance of CBT	<input type="checkbox"/>

For more references, please visit the following websites:-

- <http://www.snvworld.org/en/Documents/Knowledge%20Publications/A%20toolkit%20for%20monitoring%20and%20managing%20community-based%20tourism.pdf>
- <http://www.snvworld.org/cds/rgTUR/documents/GTZ%20docs/csd%207%20GTZ.pdf>
- <http://www.snvworld.org/en/regions/asia/ourwork/Documents/Working%20Paper%20Value%20Chain%20Impact%20Assessment.pdf>
- <http://www.gtz.de/de/dokumente/en-tourism-tc-guide.pdf>

*Locally produced souvenirs at Saung Angklung Udjo
contribute significantly to the income of the local community*



Conclusion

Community Based Tourism is increasingly becoming popular as a pro poor development tool. Beyond the usual rhetoric, a host of CBT networks now exist in the Asia Pacific region such as the Cambodia Community Based Ecotourism Network (CCBEN) and the Thailand Community Based Tourism Institute (CBT-i). Cambodia which reflects the increasing buy in among local communities and industry players. These networks function as a self help and information/experience exchange body that usually gets support from international donor agencies. Despite this, many provincial and local government agencies have a limited understanding of the process that a community has to go through to embrace tourism as a tool for economic, social and psychological empowerment.

It is against this backdrop that this handbook is prepared, firstly by providing a step by step approach to developing CBT. It is acknowledged that several handbooks and manuals on CBT exist which could be easily downloaded from the Internet. However they are mostly generic in nature. The step by step guide in this handbook is presented in a simple and user friendly manner. More importantly the steps are based on best practice and success stories from all over the Asia Pacific region. Managers who would like to have more information and a better understanding of such best practice could directly contact the key persons in charge of these CBT projects given that the contacts details are included in the handbook. In addition, references to established web sites on CBT are included at the end of each step.

It should be remembered that the 9 steps are not cast in stone. Managers may want to skip a few steps or alter their sequence. What is most essential is that the process adopted recognises the need to prepare the community before they embrace tourism. It should also be stressed that tourism is not the only path to development and that CBT is not the panacea to revitalise depressed rural economies. In fact some communities may not want to be involved in tourism so it is better to pursue different development options.

Essentially, the main element of this handbook that separates it from previous efforts is its recognition that CBT is relatively easy to start but much more challenging to sustain. As such, this handbook's second section (Step 5 onwards) focuses on the steps to sustain CBT. This will involve the scaling up of CBT to make it more competitive in terms of its business model as well as maximising the spread of its economic





benefits. Five years should be the maximum gestation period of a CBT project, after which it should be weaned off direct support from donor and government agencies.

Scaling up will require better leadership and management. The role of the local champion is expected to gradually diminish and to be replaced by a broader management base to be made up of representatives from every section of the community especially women and youths. The CBT organisation will also need to be run in a systematic, transparent and accountable manner. Otherwise dominance will set in.

Expanding the target markets is another key element of moving up CBT along the value chain. By the fifth year of operation, the CBT organisation should be business savvy enough to establish partnerships with tour operators that have access to international markets. In turn, the CBT projects needs to set and attain higher standards if it wants to attract new market segments that would be more demanding and discerning in their expectations.

Finally it should be said that like any tourism product, CBT projects need careful planning and management. Projects should not be treated like 'something that just happens' but require innovation, targeted marketing and regular monitoring to ensure success. Above all, the most successful CBT initiative should be viewed as a means to an end, that is as a catalyst to nurture thriving rural entrepreneurship in all economic sectors.

Appendix

List of Agencies & Contact Persons Involved In CBT in the APEC Region

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Websites Related to CBT

1. <http://ecotourism.com.cn/>
2. <http://northwestyunnan.com>
3. <http://www.stjacobs.com>
4. www.stjacobcountryinn.com
5. www.yalanji.com.au
6. <http://www.whalewatch.co.nz>
7. www.misowalaihometstay.com
8. www.angklung-udjo.co.id
9. <http://cullin.org/cbt>
10. www.cbtvietnam.com
11. <http://guimaras.gov.ph>
12. www.taphin-sapa.info
13. www.footprintvietnam.com
14. www.responsibletravel.com
15. www.mountain.org
16. www.communitybasedtourism.com
17. www.sustianabletourism.travel
18. <http://www.snvworld.org>
19. <http://www.undp.org/>
20. <http://www.cultureandtourism.org>
21. <http://www.cbnrm.net>
22. <http://www.culturalheritagetourism.org>
23. <http://www.mekongtourism.org>

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