

The background of the cover is a photograph of a person wearing a traditional conical hat, sitting on a ledge. The person is positioned in the lower right corner, facing away from the camera. They are wearing a brown jacket. The wall behind them is a bright, textured yellow. Above the person, there is a decorative metal railing with intricate patterns. The overall scene is brightly lit, suggesting a sunny day. The image is divided into two main vertical sections by a dark blue vertical band on the left side, which contains the title and authors' names.

RESPONSIBLE COMMUNITY TOURISM DEVELOPMENT MANUAL

PART 1

Walter Jamieson
Kelly Galaski

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Kelly Galaski

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ACKNOWLEDGEMENTS

This manual is the result of an international effort to better understand responsible community tourism based on solid research and extensive practice in most parts of the world.

Part 1 of this manual was initially developed in 1997 by an interdisciplinary team from the University of Calgary in Canada made up of: Dr. Walter Jamieson who led the project, Dr. Dianne Draper, Dr. Don Getz, Dr. Tazim Jamal and Janet Baker. The manual was then amended by a team based at the Asian Institute of Technology in Bangkok with Dr. Walter Jamieson as the director of the project together with Dr. Pallavi Mandke and Khun Pawinee Sunalai.

This version of the manual was further enhanced by the participation of Kelly Galaski, based on her 10+ years at the Planeterra Foundation, with additional contributions from members of the Planeterra team including Rhea Simms, Jamie Sweeting, and Alanna Wallace. We wish to acknowledge the ongoing advice and support provided by Michelle Jamieson.

Part 2

Kelly Galaski, Planeterra Advisor

Updates and Edits by Rhea Simms, Planeterra Foundation

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INTRODUCTION

We would like to begin by stating that this is not a textbook but rather a manual designed to help those responsible for tourism development in communities to achieve responsible results. In the wake of a global pandemic, communities are struggling to redefine and rebuild their local economies. For the past two decades, many communities have been developing tourism to draw people to their communities in order to encourage local economic development. This activity is based on the recognition by local and regional communities of the positive impact that tourism development, when managed responsibly, can bring to a community, both in terms of creating employment as well as contributing to general economic, social, cultural and environmental wellbeing.

There is now considerable experience that demonstrates both successes as well as failures of community tourism development. It is clear that by careful planning, positive partnerships between private and public sectors, and communities, as well as concern for social, economic, and environmental impacts, communities can develop successful tourism strategies. There is also considerable evidence of communities that have not achieved their objectives due to environmental degradation, lack of market connectivity, restrictive policy and regulatory frameworks, and hidden, unanticipated costs to local residents and governments. In order to achieve responsible community tourism development, there is a clear need for planning that involves all relevant stakeholders with particular emphasis on community residents.

There are many manuals and handbooks already available from the past 20-30 years of community tourism development, from which one interested in the field could choose, to guide them through the process. What this project aims to do is combine the cumulative experience of decades of community tourism development from the international development sector with the experience from the private sector to provide advice and guidance with additional practical elements that are not included in other manuals.

This manual is designed to enable communities to determine whether responsible tourism is “right” for them, how to assess important assets, provide methods for understanding market forces, develop tourism products based on market demand, and then operate them well. It is separated into two parts to address the different stages for different audiences of community tourism development.

Part 1 is based on a strategic planning approach for practitioners, governments, destinations and organizations, either involved in or wishing to embark on a community tourism development journey. The manual includes material on all aspects of the planning process. This work is the result of many years of research and practice by an interdisciplinary team drawn from many countries around the world. The original manual was the work of a team from the University of Calgary (Walter Jamieson, Janet Baker,

Dianne Draper, Don Getz). It was further developed by a team at the Asian Institute of Technology as part of a Canadian International Development Agency funded project (Walter Jamieson, Pawinee Sunalai and Pallavi Mandke) and further enhanced by researchers at the Asian Center for Tourism Planning and Poverty Reduction (Walter Jamieson, Pawinee Sunalai and Song-Kanokrattana Netlomwong). Through a new lens, Kelly Galaski and Walter Jamieson worked together to update and include examples and lessons from Planeterra's experience developing over one hundred community tourism experiences in sixty countries. Planeterra specializes in the connection of community enterprises to the marketplace. Building on established knowledge resources, this manual's objective is to provide an updated step-by-step guide that includes lessons learned from real community tourism planning processes and enterprise development initiatives.

[Part 2](#) builds on Part 1 by starting at the stage of setting up community tourism experiences and operations. It is for community organizations and enterprises to use to guide them through the tourism experience development and business management process. Practitioners, governments, destinations and organizations, may also wish to consult Part 2 for details on the operations stages and for links to further guidance. This part of the manual gives a detailed overview of additional resources for developing community tourism enterprises, linking directly to Planeterra's Learning Hub where readers can delve deeply into experience development related changes in market demands, as well as less commonly known success factors for community tourism enterprises based on working with private sector travel companies. These elements contain the practical guidance needed to make a new small community tourism business work - and be sustainable over the long term.

The Planeterra Learning Hub is a private resource compiling Planeterra's 20 years of community tourism training expertise. The site was created for the Global Community Tourism Network. Direct links to the Learning Hub mentioned in the manual will not work unless you gain access through one of the following methods:

- **Are you a community tourism enterprise?** Gain access by joining the Global Community Tourism Network [here](#)
- **Are you a non-profit specialized in community tourism?** Apply to become a Strategic Partner of the Global Community Tourism Network [here](#)
- **Are you a professional or academic?** Become a Professional Supporter of the Global Community Tourism Network to gain access [here](#)

If you have trouble accessing the site through these methods, reach out to info@planeterra.org for support.

The work is not yet complete. The next step in this living manual is to turn to our peers - practitioners, communities, professionals around the world that would like to contribute further updates and examples. Submit your ideas, edits, or illustrative case examples [here](#).

How to use the manual

The benefit of an electronic manual is that it can be referenced from any point along the process and links out to further resources, worksheets and learning modules located on Planeterra's Learning Hub.

The manual can be used from start to finish to plan a community tourism program from ground zero or by established community tourism enterprises that wish to learn more about enhancing their experiences, improving marketing, gaining new skills in pricing or pitching new travel company partners, all of which can be found within the clearly outlined sections. Part 2 targets community tourism enterprises specifically and outlines the resources to be found in Planeterra's Learning Hub.

It is designed with the community development practitioner in mind, as well as government and institution employees who find themselves tasked with an exciting new project to use community tourism as a tool for development in their country. It is also perfect for the non-profit organization that wishes to create a new tourism experience to bring in income to fund its programs based on its community development goals.

For those wishing to access the Planeterra Learning Hub for further resources and to access worksheets or to work with Planeterra on a community tourism development project, please contact the organization at info@planeterra.org or visit [Planeterra.org](https://planeterra.org). To submit comments to Planeterra Advisors Walter Jamieson or Kelly Galaski, please use [the contact form](#).

SECTION 1

INTRODUCTION TO THE TOURISM SYSTEM

This section introduces you to the essential dimensions of tourism. Our intent is to provide you with basic facts and introduce a range of concepts which will lead to an overview of the principles and ideas behind sustainable, responsible, community tourism in Section 2.

1.1 The Nature of Tourism

Tourism is the world's largest industry. Consider the following, in 2019¹:

- The tourism economy employed 330 million people, or one in every ten workers
- International tourism receipts amounted to \$8.9 trillion US
- Tourism was the world's leading economic contributor, producing an incredible 10.3% of the world gross domestic product

1.1.1 Defining Tourism

We view tourism as a social, economic, cultural and environmental activity. While tourism is most often seen as economic in nature, it must be recognized that tourism has a number of non-economic purposes, and benefits range from social (e.g., educational and recreational activities) to environmental (e.g., conservation of natural resources) and cultural (e.g., sharing of cultural traditions and events).

It is useful to see tourism as a system comprising all the activities and experiences of tourists and visitors away from their homes which are serviced by the travel and tourism industry and host destinations. The total of these activities, experiences, and services can be seen as the tourism product or visitor experience.

Like any product, its success is related to how well the supply meets the market demand. This requires an understanding, not only of market characteristics and trends, but also the process of planning to meet market needs. Companies that sell tours, and tourists themselves, are identified as the demand side, and the supply side includes all those programs, attractions, experiences and land uses that are designed and managed to provide for visitors. These supply side factors may be owned or managed by communities, private enterprise, non-profit organizations and/or governments. New and

¹ World Travel & Tourism Council. Economic Impact Reports. Accessed at <https://wttc.org/Research/Economic-Impact>

innovative forms of partnerships are also evolving to manage the challenge of ensuring the sustainable development and management of tourism-related resources.

Tourism can provide a range of benefits to a destination, including economic and social benefits, such as jobs and income for organizations and individuals. In exchange for the expenditures made in the destination area, benefits are obtained by visitors, in the form of experiences at the destination(s) and purchases of products like souvenirs and meals. In many cases there is “leakage” of the money spent by tourists out of the local economy through purchases made from foreign-owned companies and in the worst cases, zero dollars stay in the hands of local people. This happens when tourists purchase services from companies that are not based in the country being visited and that do not use products and services owned by locals, like hotels, food and transportation. This kind of tourism is the least beneficial for a destination and is the opposite of what we are trying to achieve through the development of sustainable, responsible, community tourism, which aims to maximize benefits and income received by locals. Sustainable, responsible, and community tourism will be discussed in the following sections.

One of the challenges in tourism planning and development is ensuring that all stakeholders have an equal opportunity to participate in the planning process. Often the stakeholders that stand to gain or lose the most - the local residents - are left out of the equation. This understandably leads to conflicts and what has been recently seen, in the years leading up to 2020, a backlash against tourists in cities such as Venice, Barcelona, Amsterdam and Dubrovnik, among others. This will be discussed further in this manual, but it is important to recognize that in almost every level of tourism planning a wide range of stakeholders exist. Many of these are not intuitively considered part of the tourism industry - but without them, tourism is impossible! For planning purposes, the major components that comprise the tourism system are illustrated in Figure 1.1.



Figure 1.1 The Tourism System

1.2 Types of Tourism

One of the major changes in tourism has been an explosion in different types of experiences that can be developed for visitors. Figure 1.2 illustrates the range of opportunities, many of which can be adapted to community tourism.

The more common types of tourism implemented by communities include cultural, rural, culinary, educational, agri/farm, volunteer, eco, nature and wildlife tourism. Some types of tourism lend themselves more to the urban environment and cater to business travellers. This manual is aimed at developers of community tourism and the niches within it. A more detailed discussion of the types of community tourism follows in Section 2.

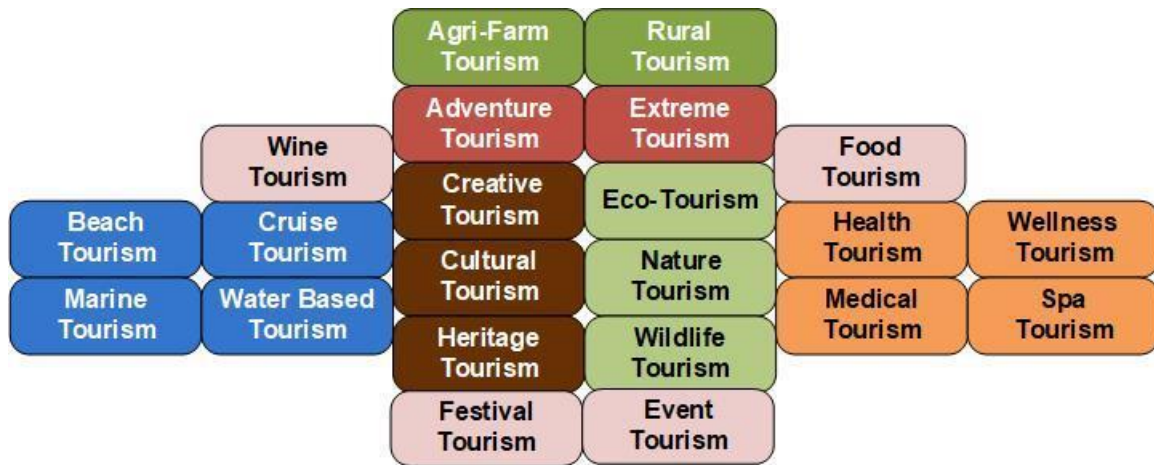


Figure 1.2: Different Types of Community Experiences

1.3 Trends and Forces Impacting Tourism

Tourism planning and development requires that stakeholders at all levels understand the larger context in which they are working in order to be able to develop policies, plans and strategies that seize the opportunities for those planning community tourism. Some of these forces and trends can be seen in Figure 1.3.

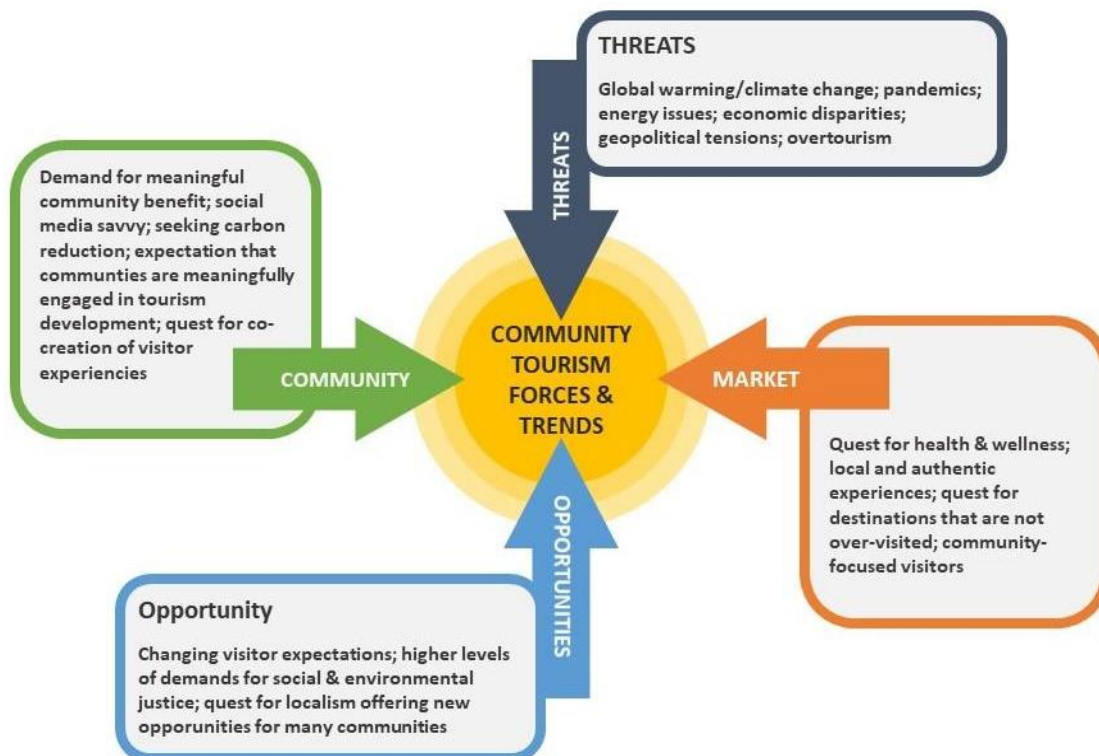


Figure 1.3: Trends and Forces Impacting Tourism

1.3.1 Tourism Volatility and the COVID-19 Pandemic

A manual on community tourism development written in 2020-2021 could not go without a statement on the COVID-19 pandemic and the resulting impacts on tourism worldwide, including on communities. As tourism volatility usually presents itself in isolated cases such as conflicts and natural disasters, there often is not a lot of preparation or subsequent changes made to management of community tourism businesses as they tend to wait until tourism returns, based on a pause of no more than a couple of months in most cases. Of course, preparation and contingency planning is always advisable, but even the most successful businesses, and individuals, did not find themselves prepared for the COVID-19 pandemic and related extended pause on tourism. As a result of all tourism being halted, the Planeterra foundation got into action to respond not only to the emergency crisis but to prepare community tourism organizations for future crises through training on business management, saving, income diversification and with development of new products and services development to build resilience.

The pandemic reinforced that safety is the number one value for tourists because without it, there is an unwillingness to travel, and sometimes the lack of safety and security makes it impossible to do so, as we saw with the stoppage of international flights. This reinforced the need to convey to community tourism enterprises to consider tourism as a supplemental income activity and to never abandon any traditional activities that provide sources of food or other basic necessities as it can never be guaranteed that once tourism income begins flowing that it will continue perpetually. The Planeterra Learning Hub provides guidance on managing through a crisis and income diversification if you are at the stage where this is the most important next step.

The international tourism community has reacted to the pandemic by strengthening their resolve to rebuild tourism better than it was before; to accelerate the pace of sustainability efforts, of carbon reductions, of conservation, and of ensuring local residents' benefit from tourism. It is our hope that more and more destinations, governments, and businesses will develop new key performance indicators that go beyond arrival numbers to deepen impact measurement. This was starting pre-COVID with destinations who were concerned about "overtourism" and who had begun to amend their measures of success using indicators such as resident satisfaction, accrual of benefits to communities, and environmental protection as well as climate resiliency. The opportunities community tourism presents, both for the local people benefitting from visits and dollars spent locally, and for the traveller to forge meaningful travel memories, should be top of mind for anyone planning tourism now and into the future.

Note: An overview of tourism and the opportunities and costs as well as the challenges associated with the industry have been provided as the gateway to the following discussion on sustainable, responsible and community tourism. One must have a basic understanding of the tourism industry in general to establish the context within which

development of community tourism fits and if you are brand new to tourism, some further reading is recommended. A glossary of tourism terms is [provided here](#).

SECTION 2

SUSTAINABLE TOURISM: BASIS, DEFINITION, AND PRINCIPLES

Despite the rising efforts to focus on sustainable and responsible tourism development, governments, local communities, corporations and organizations face the reality of satisfying a wide range of stakeholders' conflicting goals and objectives. This section introduces the concepts of sustainable, responsible and community tourism and puts forward principles that may be used to guide the overall tourism planning and development process.

2.1 The Basis of Sustainable Tourism

Over the past several decades, the inter-relatedness of all earth systems and human systems has become abundantly clear. We have understood that no human action ever occurs in total isolation from other natural systems, and we have appreciated the reality that humans are dependent on the limited resources of the earth. We have realized the fundamental importance of somehow finding ways to live within the capacity of the earth and its climate systems.

Among the imperatives that promote and enhance the vision of sustainable futures, including that of a sustainable and responsible future for tourism, are the following:

- Use of the earth's resources within the limits of the planet's carrying capacity
- Deliberate reduction in climate-changing carbon emissions from tourism activities including all transportation methods which are vital for tourism
- More inclusionary decision-making for a destination's residents and community's stakeholders
- A focus on reducing poverty and gender inequalities
- Respect for fundamental human rights
- Enhancement of quality of life through improved health care, living wages, shelter, nutrition, and access to education and income-generating skills
- Preservation of biodiversity and life support systems for all natural habitats.
- Preservation of Indigenous knowledge and ways of living, and respect for the spiritual and cultural traditions of different peoples
- A recognition that diversity is strength and ensuring tourism is inclusive and provides opportunities and benefits in an equitable manner

The United Nations Sustainable Development Goals, introduced in 2010 are the world's "blueprint to achieve a better and more sustainable future for all"² and are the goals to which all sustainable tourism efforts are aligned. While tourism officially sits under goal #12, Responsible Consumption and Production, community tourism can result in achievement of several including No Poverty, Good Health & Wellbeing, Gender equality, and many others.

2.2 Defining Sustainable and Responsible Community Tourism

While the word "sustainable" means "to be maintained", sustainability is more about a compromise, a recognition that something cannot go on forever if what it needs to survive will not be around forever. Sustainable tourism therefore does not mean unlimited growth without respect for limits. In fact, planning for sustainable tourism requires identifying possible constraints to or limits for tourism development. As noted earlier, while tourism is welcomed almost universally for the benefits and opportunities it creates, it is important to identify at the outset, the potential costs and negative impacts tourism is now known to create, and plan for a balance where the impacts on the community are net positive, and the kind of tourism developed really can be maintained.

Discussion on Responsible Tourism

One could move ahead with the understanding of sustainable tourism, but we introduce the concept of responsible tourism here first because it is an important part of the context of community tourism. Just as the word *sustainable* has its true definition, so does *responsible*, and they are quite different. Being responsible means taking care, and when we strive for tourism to be sustainable, we really do want it to be responsible - to the health and wellbeing of the destination, the community, the local people and the natural environment where tourism takes place. "Responsible tourism is about creating better places to live in and better places to visit...it's about putting people in the destinations first. Their livelihoods, their landscapes, their learnedness and their living culture."³ Sustainable tourism needs to be responsible, and travellers need to take responsibility in the way they travel, by leaving a destination better off, supporting the local economy, learning from residents and enjoying activities in nature respectfully and carefully.

2.3 Discussion Community Tourism

Community tourism at its heart, has the aim to maximize benefits for local people. There are various definitions but at its core, it is based on the principle that when communities own the tourism planning process for the places in which they live, the outcomes result

² United Nations. Sustainable Development Goals. Take Action for the Sustainable Development Goals. Accessed at <https://www.un.org/sustainabledevelopment/sustainable-development-goals/>

³ Responsible Travel. OUR GUIDE TO RESPONSIBLE TOURISM. Accessed at <https://www.responsibletravel.com/holidays/responsible-tourism/travel-guide>

in greater benefits and fewer negative impacts. When working optimally, it is responsible tourism, and it is sustainable tourism.

We expand community tourism beyond the more commonly referred to “community-based tourism” to recognize that communities stretch beyond geographical boundaries; there are many communities of people that use tourism to improve their quality of life, or to earn an income to fuel community development work. Planeterra defines community tourism as: travel experiences owned, led and run by communities – non-profits, cooperatives, social enterprises. At its very best it breaks down barriers to engage underserved communities in meaningful, life-changing ways.

Among Planeterra’s community tourism enterprise partners, there are many non-profit organizations and social enterprises that are based in urban centres and whose communities include the differently abled, migrants and refugees, marginalized women, at-risk youth, people experiencing homelessness and others. They develop tourism experiences to benefit their communities and require many of the same steps to create successful tourism enterprises. Now, how do we make sure community tourism is planned to work optimally and deliver such benefits? That is the focus of the rest of the manual!

2.3.1 Types of Community Tourism Activities

Community tourism activities do not differ greatly from general tourism activities and services like accommodation, tours or experiences, meals, handicrafts and transportation. Communities can choose to develop a full suite of services or one aspect of tourism to bring in additional income to their households, community groups, or organizations.

- Accommodation often takes the form of family homestay programs, but it can also be community-owned lodges, guesthouses or other accommodation businesses that are supporting development.
- Community tours can be focused on natural resources, cultural experiences or a mix of both and can be in rural or urban centres, by walking or cycling. Experiences can be culturally based and include food, cooking classes, handicraft demonstrations, hands-on food and craft-making, or showcasing cultural traditions including ceremonies or musical and dance performances.
- Meal experiences within a community or onsite at a non-profit facility or at a nearby location in order to earn an income for their communities or programs while sharing their purpose and impact with their visitors. Ingredients for meals are often purchased from local farmers or small businesses like bakeries, positively impacting other community micro-economies.
- Handicrafts are another common form of community tourism and are often utilized to showcase traditional crafts, provide jobs for community members of all genders and ages, and enhance cultural preservation efforts transferring knowledge from one generation to the next. The sale of traditional handicrafts

can also be linked with any other tourism experience to increase potential income to the community and jobs through tourism

- Transportation can be part of a community tourism service, to help visitors reach their destination, or it can be the experience itself.

Case Example

[Sakha Cabs](#) is a taxi service that is run by women in India. While seemingly a simple transportation service, it provides an option to travellers and locals alike to have a woman driver instead of a man. Further, it provides training and employment to resource-poor women in order to break a cycle of poverty. In order to become a professional chauffeur with Sakha Cabs, the women receive months of training on topics from English literacy to self-defence, and of course - learning how to drive through the Azad Foundation. This is one of many examples of how the non-profit sector can work to achieve social development goals with and through responsible tourism experiences.

Learn more about the Women with Wheels program [here](#).

The opportunities to be creative and think about different markets and what they may be interested in are growing all the time. Often communities think only of the international tourists' needs, but increasingly the local and domestic market is interested in getting back to their roots, visiting rural communities and learning about forgotten traditions or relishing home cooked meals like they remember from their childhoods. The local or domestic market became not only an opportunity but a necessity for communities to pursue in the wake of the COVID-19 pandemic's limitations on international travel arrivals.

2.3.2 The Impacts of Tourism on Communities

Establishing or developing tourism in your community will have benefits and costs. If these are understood from the outset, strengths and opportunities can be maximized while weaknesses and threats can be minimized. A list of potential costs and benefits are presented in the table below. Each community will be different in terms of its tourism characteristics, and the costs and benefits of tourism will vary in each destination, which can change over time, depending on tourism and other activities in the destination's local and regional context.

Economic Benefits	Economic Costs
<ul style="list-style-type: none">• Increased employment opportunities, especially for women and other marginalized groups• Increase in local economic activity	<ul style="list-style-type: none">• Hidden costs of providing tourists with services such as water and energy use, waste disposal, and food• Jobs created may be low-paying and unskilled

<ul style="list-style-type: none"> • New businesses such as hotels and other lodging facilities, restaurants and other food services, transportation, handicrafts, and guided tours • Increased foreign exchange income injected into, and staying in, local hands • Diversified sources of income for the local economy, particularly in rural areas where agricultural employment may be sporadic or insufficient for livelihoods • Increased tax revenues from tourists in region leads to more infrastructure including better roads, communications and health services 	<ul style="list-style-type: none"> • Inflated property values and rents in surrounding areas or nearby towns due to increased profile of area • New challenges related to safety and security due to influx of foreign money and visitors
Social Benefits <ul style="list-style-type: none"> • Enhanced quality of life through economic and social diversification • The creation and improvement of recreation and cultural facilities • Public spaces enhanced through tourism-related investment • Increased local community and cultural pride • Decreased stigma/increased empowerment for women and other marginalized groups as they gain a larger presence in the tourism workforce 	Social Costs <ul style="list-style-type: none"> • Increase in litter, vandalism, and crime • Overcrowding and traffic congestion • Disruption of the traditional way of life in the community • Change in the community structure (including community bonds, demographics, and institutions) • Disruption of lifestyles • Loss of sense of belonging
Cultural Benefits <ul style="list-style-type: none"> • Enhanced local cultural awareness • Increased income to help pay for the preservation of cultural resources • Sharing of cultural knowledge and experience • Revival of local traditions and crafts • Increased pride in cultural heritage and Indigenous wisdom, knowledge and traditions 	Cultural Costs <ul style="list-style-type: none"> • Loss of and damage to historic sites • Long term damage to cultural traditions • Erosion of cultural values • The authenticity of the social and cultural environment can be changed or lost
Physical Environmental Benefits	Physical Environmental Costs

<ul style="list-style-type: none"> ● Tourism encourages conservation of important ecosystems and natural resources like forests, clean waterways and beaches and wildlife protection. ● Parks and nature preserves may be created or enhanced ● Increased awareness and concern for the environment 	<ul style="list-style-type: none"> ● Rapid development and over development can forever change the physical environment and ecosystem of an area ● Litter, erosion, overtaxed sewage and waste management systems if not carefully managed and planned for ● Sensitive areas and habitat may be lost if overused ● Excessive waste generation ● Water and air pollution ● Depletion of water resources ● Wear and tear on infrastructure
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2.3.3 Community Tourism Challenges

Challenges that have so often plagued community tourism enterprises wishing to have successful tourism programs are based on their location, lack of uniqueness, the ability to reach customers (access to market), and lack of financial resources or business management skills. Elements of success follow, but it is important to note that these challenges can often be overcome but not always.

Location is one challenge that needs to be seriously considered before real planning begins. If a location is inaccessible to the point that it takes many hours or days to reach, the challenges to reach the market will be substantial. If a very remote location is coupled with a lack of uniqueness this challenge becomes even greater. This is not to say that the community could never attract any customers. Particularly today, with connectivity and ability to use online platforms for selling directly to travellers, communities can reach customers better than ever. That said, there may not be enough of a draw, to gain enough customers to make a business viable. This, at the very least, should be considered and made known to the community at the outset of the planning process.

Lack of financial resources and business management skills are challenges that are easier to overcome with the right support and training and, for example, Planeterra has seen dozens of community organizations overcome this obstacle over time and go on to be very competent and successful small businesses.

Case Example

The Jukil community lodge in Bolivia was established in 2005 but lacked visitors as the lodge was not established based on market demand and with no clear customer bases at the time of opening. Further, community members did not have in-depth knowledge on the skills necessary to find and motivate potential customers to visit, or how to run

a successful business. This resulted in the lodge closing for 11 years and falling into disrepair. In 2016 they were supported by Planeterra to improve the facilities and identify market partners, as well as invest in skills such as business management, human resource management, finances, operations and health and safety. Today, the community members are confident that they know their roles in running the business successfully and hosted over 4,000 travellers per year (pre-2020).

Learn more about Jukil Lodge [here](#).

A final main challenge that is a result of human nature, can be conflict within communities in relation to goals, ideas of what should be shared with outsiders, participation, commitment, motivation, and greed. This can be planned for and mitigated with good engagement and leadership but is difficult to be avoided completely.

Important factors in controlling this are: to have a good management model with clear responsibilities for the leader and all roles within the management team or committee; transparency with all community or organization members during the planning process and during the operations phase when income starts to be generated; and defining and agreeing on a vision and goals for tourism together at the outset.

Case Example

The Thailand Hilltribes Trek in Northern Thailand is a great example of community engagement. The local members of the Mae Hong Son community tourism association took part in months of training facilitated by Thailand's Community-based Tourism Institute and Planeterra field manager. Training and program development focused on setting goals, planning, establishing roles and responsibilities in operations, transparency in broader community communications, providing training for new members and home stay providers and guides, conflict resolution, as well as good and simple financial management. Having good governance and transparency is extremely important in community tourism management and the model developed here has proved successful as the community tourism enterprise has grown significantly and caters to both international groups, independent travellers and the domestic market.

Learn more about Thailand Hilltribe Trek [here](#).

2.4 Guidelines and Principles for Sustainable Community Tourism

A focus on the following elements of success, and how to achieve them, is characteristic of the manual sections. Building strong management skills, collaboration and seeking out market partnerships, ensuring ownership and empowerment of community members,

planning ahead with community goals in mind, and diversifying income sources so as not to become too reliant on international visitors, all feature throughout the manual.

Key elements for community tourism success have been outlined by Dodds, R. et al⁴:

1. Participatory planning and capacity building - to strengthen community's tourism management skills
2. Collaboration and partnerships facilitating links to market - to ensure financial viability
3. Local management/empowerment of community members
4. Establishment of environmental/community goals - to ensure outcomes are aligned with community's values
5. Assistance from enablers (government, funding institutions and private sector) - to facilitate access to the formal economy
6. Focus on generating supplemental income for long-term community sustainability

We provide below a list of guidelines, techniques and principles (summarised in Figure 2.1) that reflect the key elements of successful community tourism and are important for destinations and organizations who wish to be guided by the ethics of sustainable and responsible tourism. As you follow the actions outlined in the rest of this workbook, remember that all of these actions should be preceded and implemented by an ethic based on the principles outlined in this section.

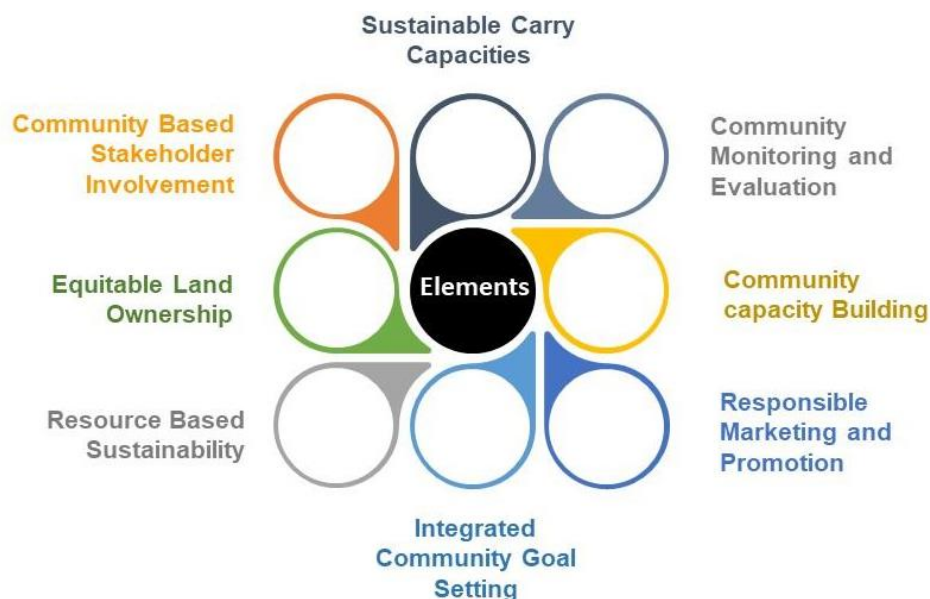


Figure 2.1: Key Elements for Successful Community Tourism

⁴ Rachel Dodds, Alisha Ali & Kelly Galaski (2018) Mobilizing knowledge: determining key elements for success and pitfalls in developing community-based tourism, Current Issues in Tourism, 21:13, 1547-1568, DOI: 10.1080/13683500.2016.1150257

Community Based Stakeholder Involvement and Partnerships

A community tourism initiative must be developed with the engagement of broad-based community input with the participants representing local non-profit groups and institutions, volunteer service groups, municipal governments and their economic development departments, tourism associations, destination management organizations/visitor bureaus, town business associations, regional representatives of provincial tourism, and any other party which might be involved in or impacted by tourism or could be a support system to the community involved.

Linkages must be established among the local businesses in the tourism industry in order to ensure that tourism expenditures stay within the destination rather than leak out to purchase imported goods and services for tourists. Local involvement in tourism facilitates the development of linkages among the service and goods providers within the tourism destination.

Equitable Local Ownership

Tourism development must provide quality employment for community residents. Creating job opportunities has to be an integral part of any tourism development at the local level. Part of the process of ensuring quality employment is to ensure that as much as possible, the tourism infrastructure (accommodation, restaurants, tours, cultural experiences, shops, etc.) is developed and managed by local people. Experience has demonstrated that the provision of education and training for local residents and access to financing for local businesses and entrepreneurs are central to this type of policy.

Integrated Community Goals

Harmony is required between the needs of a visitor, the place, and the community. This is facilitated by broad community support with a proper balance between economic, social, cultural, and human objectives, and a recognition of the importance of cooperation between government, the host communities, and the tourism industry, and the non-profit organizations involved in community development and environmental protection.

Cooperation among local residents and businesses is essential given that one business or operation can be directly affected by the performance or quality of another. Models of partnerships must be explored in the areas of planning, management, marketing, and funding for tourism ventures. Local financial institutions can also play a role by collaborating with local entrepreneurs to help provide businesses with necessary start-up funds.

Sustainable Carrying Capacities

There is a need to assess the impact of tourism development plans. The capacity of sites must be considered, including physical, natural, social, and cultural limits; development should be compatible with local and environmental limits. Plans and operations should be evaluated regularly with adjustments as required.

The scale and type of tourism facilities must reflect the limits of acceptable use that resources, including community members, can tolerate. Small-scale, low impact facilities and services should be encouraged. The determination of the volume and scale of visitation should be part of the community planning and visioning process.

Community Monitoring and Evaluation

Tourism operations need to establish requirements for impact monitoring and ongoing evaluation. There should be codes of practice established and also indicators and threshold limits for measuring the impacts and success of community tourism ventures. Protection and monitoring strategies are essential if communities are to protect the very resources - environmental, social and cultural, including their own wellbeing, which form the basis of their tourism product.

Community Capacity Building

Sustainable community tourism development requires the establishment of education and training programs to improve understanding and enhance business, vocational, and professional skills. Training should include courses and workshops in tourism and hospitality, as well as general business planning and financial management and marketing. Community tourism businesses are like any business and their managers need to have good business management skills in order to be successful.

Responsible Marketing and Promotion

Promoting community tourism should focus on activities that draw from and reinforce natural landscape character, sense of place, community identity, and stories of impact. These activities and uses should aim to provide a quality and meaningful tourism experience for visitors while adhering to the other principles of sustainable and responsible tourism.

2.5 Capacity and Limits

2.5.1 Capacity and Limits of a Site

Sustainable and responsible community tourism requires that limits to growth or change be considered and imposed because the capacity of sites or communities must be respected. The setting of limits is almost always controversial and will run against dominant industry and political philosophies which are based on the premise of perpetual growth.

Communities generally have the right and often the means to define the pace, size, and types of development, but frequently these issues are not addressed. In other cases, they are the subject of intense debate, depending on the current and proposed nature of development. It is essential to address the issue of capacity and limits early, and especially in the vision and goal statements of a community plan or tourism strategy. As practitioners, it is the responsibility to outline potential negative impacts to communities who may be unaware of impacts when first considering developing tourism infrastructure or experiences.

Case Example

When a community in Guatemala, San Juan La Laguna was deciding how often they wanted to receive visitors in their family home stays, Planeterra discussed with them the reality that if they became very popular, they could have people in their homes every night if no limits were put in place. The community decided to establish the maximum number of days per week they would like guests, and each family set their own limits for the number of days hosting per week.

In the Indigenous Wiwa community of Gotsezhy, in Colombia, the Chief set the weekly maximum visitors at 50, so as not to disrupt too greatly the very remote and traditional culture and ecosystem of the village.

Learn more about Posadas Mayas [here](#) and Gotsezhy Wiwa Community Tourism [here](#).

Identifying the capacity of a site or facility is easier than doing so for a community. Many sites and facilities have fixed capacities set by their size, laws (e.g., fire regulations), availability of space, user comfort (avoid crowding) or the nature of activities to take place. Of course, facilities and sites can be expanded if the need and resources exist, but expansion should occur within the framework of a plan and a forecast of the additional volume of use and impacts that more visitors/users will bring.

2.5.2 Capacity and Limits of a Community

A community's capacity to absorb tourism is very difficult to determine, especially because continued expansion is often assumed. But limits always exist, as in the availability of water, sanitation, electricity, and even food, and there is usually a high cost to expanding infrastructure. Furthermore, population growth must be accompanied by more schools and other services, so the pace, nature, and size of development are certainly legitimate and important issues for all residents to comment upon.

Communities will want to consider the following capacity issues:

- Physical: Is there enough space for development without harming resources or destroying the existing character of the community?

- Ecological: Will growth or specific developments destroy wildlife habitat, threaten species, water quality and accessibility, food security, or reduce biodiversity?
- Cultural: Are traditions threatened by development and tourism pressures? Do residents have resilience against external cultural influences? Do residents have control over the cultural experiences they are sharing, to ensure protection of their cultural knowledge and property?
- Social: Will rising crime or health problems threaten the local population? Is there fear of losing control to newcomers and outside investors if the area becomes very popular due to the tourism that has been developed?
- Economic: Is there adequate funding for the needs of the community in terms of the infrastructure and facilities needed? Is there potential for other sources to help finance the costs of maintaining the new businesses in the community?

Case Example

In the Mae Hong Son communities of Ban Jabo, Ban Pha Mon and Ban Ma Phong in Northern Thailand, they successfully developed a community tourism enterprise based on a trek connecting the three villages, where homestay accommodation is provided to trekkers. The experience, developed with assistance from Planeterra, was included in international travel company, G Adventures, tour itineraries and the volume was healthy but not over-saturated in two of the three communities.

Subsequently two issues occurred: 1) The community realized they did not have enough water during the dry season because of the use from the tourists and so additional funding was sought and provided by Planeterra to install water catchment and storage tanks to ensure access to water for residents throughout the year. 2) One of the communities became very popular with the domestic market and had to expand family participation and build extra accommodation, all while trying to maintain a balance and cultural experience for the international travellers.

Learn more about Thailand Hilltribe Trek [here](#).

SECTION 3

GETTING THE COMMUNITY READY

This section provides guidelines for determining community readiness and gathering support for tourism through information exchange, awareness campaigns, community tourism visioning and cooperative efforts. It addresses both communities with established tourism and those communities new to tourism.

3.1 Introduction

This section discusses four major steps for getting the community ready and gauging the level of support for tourism. While these steps may appear time consuming to initiate, remember that the success of tourism in your community and for your organization will depend on the attitudes of community members toward tourism. Their support of, and involvement in tourism planning, development, and management is key to implementing sustainable tourism. Enlisting volunteer help from community members as you proceed through these steps is a good idea - in addition to providing a helping hand, it also helps to raise awareness of the process within the community. Earlier we introduced our concept of community tourism to include not only geographic-based communities, but communities of people, or organizations developing a tourism enterprise to support their non-profit program. Throughout this section when we discuss engaging with “the community” we include all members of either a geographical community, your community group, or employees, leaders and board members of an organization embarking on a new tourism initiative.

3.2 Community Support: The Basis for Successful Community Tourism

Practicing responsible tourism involves ensuring the long-term well-being of the destination’s host community and its environment, as well as the satisfaction of the visitor. The communities within a destination area are a source of services and facilities for the visitors, and may also contain built, natural, cultural resources or other attractions. If these resources are to be shared by the community with incoming visitors, they must be managed so that both residents and visitors feel that they benefit from the relationship, without destroying the resources. The commitment and support of the local residents or members of the organization is essential to achieve this objective and must be initiated early on in the community’s tourism process.

Generating community support is facilitated by:

- a. Involving the community through meaningful consultation, engagement and participation and ensuring members have ownership over the plans and decisions, early on in the process. Failed plans can often be due to planning that lacks the relevance, dynamics, and motivation that is better obtained through active community support and ownership.
- b. Encouraging cooperation and linkages between the community members and the broader tourism efforts of the region. Involving local people in planning facilitates the inclusion of a range of community interests into the tourism process. At the broader community destination development level encouraging local volunteering and cooperative efforts with a broad base of residents in activities such as interpretation, and attractions and events management help to establish links with the locals and linkages among the many fragmented services and facilities that serve tourists. At the community tourism experience level, involving staff or committee members of the organization in the full experience ideation, from determining what is to be shared and not shared, to establishing the roles and responsibilities for operating a tourism service, to (at times) participating in the building or improvements of infrastructure and facilities.
- c. Ongoing community member engagement, consultation and education about tourism activity. Residents and/or staff or community members' perceptions of social and economic benefits may be influenced by the amount of tourism education or training they have received and therefore including preparation around the tourism process, the positive and negative benefits, the various players in the industry and how it works, is extremely important to set them up for success. People who benefit from tourism perceive greater positive economic impacts and fewer negative social and environmental impacts from tourism than those who do not. The more people are included in decisions and outcomes, the more control they feel they have and the more motivated they continue to be, and the more positive the experience will be for everyone.

Often at the beginning stages of thinking about launching a new tourism initiative, a community is fascinated by tourism and sees the potential economic benefits and wants to dive right in. As facilitators of the preparation, we owe it to the community members to ensure they are aware of all elements - the good, the bad, the challenging, and the frustrating. Practitioners often focus on the general social impacts which are important, but there is another piece that can make or break a community's satisfaction in working in tourism; the practical realities of operating a tourism business.

Planeterra's practical approach to the preparation process includes a discussion on how tourism works, what it is like to host guests, host groups, and to collaborate with travel companies, work with tour guides, receive complaints, ask for feedback, how to interpret feedback and how to make improvements. Customer Service 101 should be part of the process of collaborating with communities embarking on tourism initiatives, because it mentally prepares community members, and ultimately employees, for the inevitable challenges in dealing with customers. Planeterra's Learning Hub includes a section on

understanding the various roles and responsibilities of a tour operator partner and understanding how to manage difficult situations during the hosting experience.

3.3 How Prepared Is the Community for Tourism?

Community acceptance and readiness are critical if a new tourism initiative is to be successful and sustainable. Decision-makers must first take a hard look at the current situation in the community, and determine whether tourism is necessary and feasible, and whether the community is supportive of tourism and the changes it may create for them, their families, and the broader community.

Community destination planners and managers or leaders of organizations embarking on a tourism enterprise development initiative should be aware that:

- Resources may not be in place to enable tourism (e.g., a critical mass of attractions may not be available in the community, capacity to manage tourism services may not be there, the location may preclude the community from being desirable from the market perspective)
- The community may not - automatically - desire tourism activity, ensuring their support is a necessary requirement for community tourism to be successful (therefore if it is not supported it may not be the right economic sector to pursue)
- The necessary local/regional political governance structures or environment may not be present
- Careful assessment is required to determine if tourism development is a good idea for the community, i.e., this should not be an automatic assumption

3.4 A Process for Preparing the Community

There are a number of possible steps for getting the community ready for tourism. The following table provides a summary of the information that follows in this section.

Step 1: Assess Community Needs and Readiness for Tourism:
<ul style="list-style-type: none">• Identify current involvement of the community or the organization in tourism and compare it with other existing economic activities• Identify key stakeholders to be involved in decision-making and in tourism enterprise development and the ultimate experience delivery• Identify economic, social and cultural needs for, and expectations from, tourism.• Determine community attitudes, concerns, interests and values• Evaluate community need and readiness for tourism
Step 2: Educate Community/Organization Members:
<ul style="list-style-type: none">• Present the potential positive and negative changes in the community due to tourism. Include the challenges of tourism operations and customer satisfaction. The more realities that can be provided, the more informed and prepared community members will be

Step 3: Establish Leadership for the Tourism Process:

- Identify key leaders (formal and informal), and key groups (key stakeholders).
- Form or appoint a community tourism organization or committee (if one does not yet exist).
- Establish key responsibilities of each member and create sub-committees if needed for specific activities, (for example for visioning exercises, product and experience development, operations planning, etc.).

Step 4: Develop a Community Tourism Vision:

- Formulate work plan and process for gathering broad-based community input. Appoint facilitators (hiring from outside is helpful because they are neutral).
- Initiate process; create an uplifting statement of desired future state; incorporate what a community holds important (beliefs, values, sense of place, tourism resources, etc.). Include what you DON'T want tourism to be or bring.
- Identify key community themes, issues, and concerns related to tourism, plus tourism resources where development and use would be supported by the members.
- Disseminate results back to overall community or organization stakeholders.
- Use vision statement actively and update periodically.

Step 5: Implement Mechanisms for Ongoing Support:

- Continue community awareness and transparent sharing of information through reports, meetings, etc., ensuring ongoing understanding of progress and results (important to continue once operations have launched and money begins flowing in for greater transparency).
- Conduct a community attitudes, satisfaction and impact survey (periodic).
- Continue empowering community members through participation in tourism planning, decision-making, development, and service delivery.

STEP 1: ASSESS COMMUNITY NEEDS AND READINESS FOR TOURISM

The objective of this step is twofold:

- To assess the current and potential role of tourism in the community.
- To assess the community's support for tourism activity. This step starts with research into the community's attitudes toward tourism, as well as community needs, expectations, and current involvement with tourism. A number of ways to obtain information are listed in the table. A combination of methods is encouraged in order to ensure that a representative diversity of community opinions and needs are obtained. We encourage you to use [Worksheet 3.1](#) to assist you in information gathering.

Method	Pros	Cons
Use existing information from a range of sources including any previous planning	Avoids repetitiveness of data gathering and saves time	Data may not be accurate or timely

processes or community surveys		
Conduct community survey (door to door or via social media) if current information is not available, includes questions on community attitudes	Pros: Can obtain representative range of views	Cons: Requires higher user sophistication than personal interviews
Conduct in-person interviews either formal or informal with key local groups, community representatives and individuals	Fulfills two purposes both to obtain survey information and establish ongoing engagement	Can be time consuming and may exclude other legitimate views
Call community meetings and invite key community groups and community leaders.	Face-to-face interaction provides opportunity to discuss issues in more detail than written questionnaires and may be more time and cost efficient.	May not always get a representative cross-section of the community especially marginalized members may not feel comfortable with this format
Organize informal meetings, for example home-based meetings/ focus group style of 10 to 15 people; can be done virtually or via online platforms to increase participation	More convivial atmosphere which enables getting opinions of individuals who may not be comfortable standing up in a larger public meeting	Time consuming

Actions Recommended to Assess Community Needs and Readiness for Tourism

1. Identify current involvement of the community or the organization in tourism and compare it with other existing economic activities. What is the size and nature of tourism and other economic activities of the organization, or the community locally and/or in the region?
 - Conduct a preliminary survey of tourism resources and activities in the community.
 - Examine information on regional context, since some coordination of economic activity and population flows between the community and the surrounding region will possibly be required. It is, therefore, important to identify regional political structures and policies regarding tourism.
 - If applicable, or available, Examine government and other documents related to economic development of the local and regional areas (See worksheet 3.2) including existing plans, initiatives and vision statements related to tourism.

2. Identify key stakeholders in the community's environmental, social, cultural, political, and economic domains. (See worksheet 3.3 Gauging Support of key actors and groups)
 - Key stakeholders include the formal and informal leaders and power bases in the community. Formal leaders can be identified by the roles they bear, e.g., community president or association leaders, teacher, mayor, etc. Informal leaders can be more difficult to identify. These are opinion leaders and influential individuals to whom community members turn for informal advice or assistance.
 - In addition, there may be other hidden powerful people who control financial information or other resources, who also need to be identified and included as a key stakeholder. It is important to identify both the internal and external power structures that can influence resident attitudes and development directions (e.g., public regional decision makers, large tour operators and transport / access providers).
 - We recommend seeking out, if applicable, existing reports from previous development plans that contain lists of such stakeholders including volunteers and non-profit organizations, community associations etc. as well as using word of mouth and observation to help identify key stakeholders.
3. Identify the economic, social, and cultural needs for, and expectations from, tourism.
 - What kind of jobs can tourism provide for the community or organization? What kinds of facilities and services does the local community require which could be provided through tourism development (jointly shared with tourists or developed solely for the residents)? What role can tourism play in community development and environmental protection? What are the community's expectations from tourism?
 - Use existing information if current; include questions in survey as required. Ensure that key stakeholders identified in above are included in the information gathering process.
4. Determine community values, interests, and attitudes toward tourism through the survey and/or other methods outlined above (see Worksheet 3.4).
 - It is important to include the key stakeholders identified above in this exercise.
 - Identify tourism-related strengths and concerns of various key community members, groups, and community leaders, (based on the study of community attitudes and interests). For example, the community may enjoy showing off a historic site (strength), but may resent sharing or want to keep private, a favorite picnic site with visitors (concern). Community interests and attitudes can also be observed in the community vision statement as well as the community tourism visioning exercise and statement (Step 3). Areas of support, resistance and indifference to tourism among the community stakeholders should be identified.

- Managers of tourism projects should provide information at the outset to residents of positive benefits (e.g., economic opportunities, opportunity for preserving and fostering cultural resources and sense of place, etc.) and potential negative impacts of tourism, so that residents are able to make informed decisions on the values they wish to preserve, the amount and type of change desired for the community's economic and sociocultural fabric. Recall that studies have shown that tourism education, familiarity with tourism development proposals, and perceived benefits from tourism can influence resident attitudes toward tourism.
5. Evaluate community need and readiness for tourism, using the following questions as a guide:
- How much is tourism contributing to the community or organization at present?
 - What options and priorities are presented by encouraging tourism?
 - Are the community members ready for tourism development? Where does community support for tourism lie? In which sectors does support need to be encouraged? Identify reasons for positive and negative support, in order to manage this aspect.
 - Where does the power lie in tourism decision making? Is there an existing vision or leadership for tourism within the community (who holds this)? Who could be mobilized to provide leadership? Make a list of key community players whose ongoing support and participation is valuable.
 - Are there identified tourism assets, either physical or cultural, within the community or organization? Do they need to be created or developed further?
 - Do community attitudes, (demonstrated by information gathered and analyzed) show that the community is in support of tourism?

STEP 2: Educate Community/Organization Members:

Education and preparation around the tourism industry as well as the potential benefits and impacts from tourism (both positive and negative) are essential in any community tourism development process.

A full capacity-building process should be planned to include the following topics:

- a. The nature of the tourism industry including roles, sectors, and the tourism value chain
- b. Economic, social, cultural, and environmental impacts (positive and negative) of tourism, of hosting visitors, of sharing cultural traditions, of operating a new business
- c. Tourism as a supplemental form of economic activity (for rural communities especially; guidance around maintaining traditional lands and other activities like agriculture is important in order to avoid issues such as food insecurity in times of low visitation or during crises like natural disasters and pandemics)
- d. Marketing principles including the concepts of market demand, and sources of different types of market segments, for an understanding about how tourism

responds to trends and different tourist profiles, and the pros and cons of different types of customers

- e. Working in the tourism industry: customer service and satisfaction, challenges in hosting guests, sharing cultural traditions, hospitality standards
- f. Tourism operations from reservations to service delivery to human resource management to financial management

STEP 3: Establish Leadership for the Tourism Process

If the decision is made to go ahead with tourism development, the next step is to establish leadership for the tourism activity to be engaged in. Establishing leadership to guide, monitor, and adjust the tangible and intangible costs and benefits of tourism is critical to ensure the long-term sustainability of the initiative and to manage impacts. An organizational structure for leadership should therefore be put in place with input and participation of a wide diversity of the community's stakeholders if possible. If an existing functional organization (such as a local association or government agency) is appointed to take on this role, then additional organizational structure needs to be enacted to allow for input from other community members. Establishing ongoing leadership will facilitate future planning-related actions such as constant scanning of the environment, identifying opportunities and managing problems as they emerge, hence increasing the ability for tourism to be responsible and sustainable.

For non-profit organizations embarking on tourism or community groups who want to take tourism to the next level, identifying the right ownership and management structure of a new tourism enterprise is critical at this point. The following roles should be in place:

- A leader to guide and keep everyone on track
- A communications role to ensure all stakeholders are informed and invited to join meetings
- A secretary role to keep records of all decisions
- A treasurer role to take responsibility for all financial planning and record-keeping
- Others as needed for example to help plan and execute the plans

For non-profit organizations, existing roles within the organization can take on new related duties; however, it is recommended that a new enterprise arm be established or at the very least a new committee with roles required to plan and manage the tourism business be put in place. For community organizations, it is very important that once the development phase is over, and the operations begin, that there are clear management and employee roles, separate from the original planning committee. It is highly advisable that these roles are paid (as soon as revenues allow) to ensure time commitments, motivation, and to prevent fatigue from volunteering.

Case Example

When it came time to start training for Parwa Community Restaurant, a full recruitment and skills-analysis process was undertaken. Rather than have open invitation to all community members on training for kitchen and serving roles, the Planeterra Field Manager and contracted Chef Consultant developed a process to assess different community members' interests and skills, previous training, and areas of potential, to help them identify the specific roles they for which they were most interested in training. This helped with retention in the training programs for the various roles and ensured the right people were in the right roles.

Learn more about Parwa Community Restaurant [here](#).

Examples of Community Tourism Organization Structures

There are a number of possible community tourism organizational structures. Some pros and cons of potential organization structures for community tourism are presented in the following table.

Organization	Role	Pros and Cons
Local destination marketing organization	Tourism marketing and promotion; visitor information services.	Pros: May be funded by public and/or private sources, hence may have funding sources. Cons: can have a narrow functional area.
Chamber of Commerce	Business development, networking, and support.	Pros: Familiarity with broad business community needs and functions. Cons: May have pro-development philosophy.
Local Government / Economic Development Office	Economic development, resource allocations, public services	Pros: Legitimate representative of community, has potential funding source Cons: may not be representative of community member interests
Community group (e.g., resident or environmental organization, NGO)	Advocacy, lobby group, networking	Pros: Representative of community member interests. Cons: Generally, volunteer based hence may lack

		funding or suffer volunteer burnout
Community Tourism Organization (may need to be created (see next section))	Strategic tourism planning and management; ongoing monitoring of impacts and planning outcomes	Pros: Broad-based community interests represented with active guidance of tourism. Cons: May be time-consuming to set up and may be costly to maintain, depending on activity
Community tourism enterprise, association or cooperative	Formed by a community or organization that wants to establish new business opportunities	Pros: Legally formed business, non-profit association or cooperative, with specific objective and defined roles & responsibilities for effective management of tourism service and utilization of profits Cons: May not represent enough stakeholders; incorporating broader input can help with this

Actions Recommended to Establish Leadership for Tourism Development

1. Identify the key stakeholders in the community's tourism domain.
2. Form or appoint a community tourism organization (CTO) e.g., Community Tourism Advisory Committee, and invite key stakeholders to participate.
Sustainable tourism development will require collaborative participation of key individuals, organizations, and groups. A broad diversity of community interests, values, and expertise should be represented in the CTO. Special actions may need to be taken to ensure that marginalized sectors such as low-income groups or minority segments in the population are able to be represented (e.g., covering participant costs related to attending meetings, such as travel, child-minding services for parents). The CTO must be perceived to be a legitimate and capable representative of the whole community.
3. Establish planning scope, terms of reference, and key responsibilities of the CTO.
 - The CTO is a leadership organization. It guides what should be done, how to do it, and ensures sustainable development of the tourism industry through ongoing monitoring, adjustment, and community involvement. Detailed operation of activities and attractions, or site level planning, is not a function of this organization.

- The planning scope should be established - mandate, purpose of the planning exercise, public involvement, etc.
- Establish terms of reference for the CTO and ground rules for decision-making and participation. Consider aspects such as size, structure, remuneration, decision-making authority, budget and funding, organization life span (temporary, ongoing, etc.). Identify key responsibilities and tasks. Initiate sub-committees or working groups for key areas.

Some major areas of responsibility can be:

- Involvement in community tourism strategy planning.
- Guiding and evaluating physical development, programs and activities.
- Ongoing monitoring of tourism development and impacts [watchdog role].
- Guiding impact mitigation and adjustment to tourism strategy.
- Ensuring that sustainable tourism is being implemented.
- Establishing sub-committees for managing various aspects of the overall tourism strategy, mobilizing volunteers and non-government organizational resources to assist in tourism management.
- Assisting with ongoing community education and awareness of tourism activities.
- Investigate tourism operation laws and legalization of entity for business management. For a community wishing to operate a tourism business, or a non-profit entity that exists that wishes to begin operating tourism experiences, it is important to investigate the laws around tourism operations at the national, regional and local levels. Specific types of legal entity options may be available, both for-profit and non-profit, and the pros and cons of each should be weighed in order to determine the course of action.

STEP 4: Develop A Community Tourism Vision

A community vision portrays the community's future desired state, its hopes, aspirations, and desires for its future. It often displays the community's values as well. A community vision for tourism is critical when one considers the complexity, dynamism, and interconnectedness of the tourism system. Typically, numerous participants provide tourism services and facilities, and diverse community views and attitudes may exist toward tourism development. Environmental and resource conservation pressures, as well as increasing global and regional competition for tourism dollars increase the challenge of developing tourism which satisfies the visitors and the community members.

Some of the questions to be answered as part of this process include: What is the community's vision for tourism? What are the community development goals? What kind of impact do they want to have? How does the community plan to spend the income?

The Benefits of a Community Tourism Vision

- Holistic, integrated decision-making is a fundamental requirement of sustainable development. A vision statement created by involving a broad segment of the community could provide a representative picture of the community's beliefs, values, and aspirations pertaining to tourism in the local area.
- A community tourism vision statement provides a tangible framework for development decision-making and tourism strategy planning. It can be used to demonstrate to developers, decision makers, visitors, and residents that the community has specific ideals and values, as well as aspirations and goals for its future direction.
- Recognition of interdependence and having a stake in the issue are essential for collaboration and cooperation. Through the process, participants can come to have an improved appreciation of their interdependence and better recognition of the need to work cooperatively in order to ensure that personal and collective goals with respect to the community and the environment they live in, are achievable.
- The process of developing a vision statement is also important in that it facilitates the understanding of common values, goals, and interests among the participants. Greater understanding of the issues and problems related to tourism development may also be obtained. A collaborative visioning process can therefore help generate greater cooperation in the community through a better-informed participant base.
- Even if it is not a binding document, a community-formed vision statement can be used to demonstrate to elected public representatives the desires and aspirations of the community, particularly when the community needs to ask for help for example with funding, with equipment or infrastructure improvements.
- Effective facilitation of the process is important to ensure that the discussions bring out the relevant elements of the community vision in a reasonable time frame. Without the aid of knowledgeable and experienced facilitators, the diverse views and intangible belief systems of a wide number of participants can make a community visioning process lengthy and time consuming.

Possible Elements of a Community Tourism Vision Statement:

- Uplifting statement of future desired state (aspirations, goals).
- Image of what the community is (character, history, etc.).
- Community beliefs, values, and attitudes that would affect the future direction of tourism
- What is important regarding community quality of life, sense of place, and authenticity; what is cherished and desired to protect or enhance; environmental, economic, political and socio-cultural values.
- What is sacred, and not to be shared
- Statement of type of development and kind of growth desired - what are the ways that income will be invested into community development needs?
- What positive impacts the community wants to see

- What negative impacts it wants to avoid
- What changes are wanted and what changes are not wanted

Case Example

Planning for Tourism and the Management of the Parwa Restaurant in Huchuy Qosco, Peru

When Planeterra began working with the Huchuy Qosco community in Lamay, in Peru's Sacred Valley, an important step in the process was the development of the community's *Plan de Vida*. This directly translates as "life plan" and it is a community development plan that was facilitated by the Planeterra field team but generated by the community members; representatives of the sixty-five families that live in Huchuy Qosco and make up the Huchuy Qosco Association, the body that oversees tourism in the village. They are the owners of the Parwa Community Restaurant that was established primarily to serve lunch to the many thousands of people passing through the area enroute to the famous Machu Picchu historic site. The Planeterra team collaborated with the community to establish all of their goals and practical ways the income generated would be spent to invest in the business and ongoing maintenance and improvements, benefits to employees, and social and infrastructure programs in the village for improving quality of life. The plan guided projects for the first years of operation, and income was spent on an internet and computer library, a sanitation system for the village, water tanks for each home, a scholarship program for children, a social security program for elderly, among other programs. Additionally, during this process, a cultural guide was developed: what items they wanted to share, what stories they wanted to tell, and what elements they wanted to hold sacred, or private, only for community members, so that they would have a reference tool for helping to develop the visitor experience to their village restaurant and organic gardens.

Learn more about Parwa Community Restaurant [here](#).

STEP 5: Implement Mechanisms for Ongoing Support

Ongoing community involvement and support of tourism is critical and should not end after the community visioning exercise. Raising awareness and educating community members about tourism and visitors to the area, about tourism-related developments and their impacts (both positive and negative), is tremendously valuable in creating a knowledgeable community, whose attitudes, interests, and support of tourism develop on an informed basis. Since attitudes are affected by understanding of tourism development and its impacts, keeping the community regularly updated in these areas and obtaining their opinions is necessary.

Community Participation/Engagement

Various community members can be involved in tourism to varying degrees, ranging from information gathering to direct decision making, ownership, and employment in

planning, project development, and service delivery. In the context of sustainable tourism development, a clear distinction has to be made between consultation and participation. While community consultation is highly recommended, this is not synonymous with participation. Sustainable tourism development requires participation which allows people the right to be able to order and influence their world. In order to accomplish this notion of empowerment, opportunities have to be created to enable community members to participate as fully as possible in directing the development of their community.

Local people can get involved directly in the tourism planning process (via committees, workshops, and other channels in the CTO), and indirectly through public meetings, surveys, etc. Direct participation in tourism-related projects is also highly recommended, since this creates a sense of ownership in the outcome of the process (i.e., a stakeholder). Participation also enables the benefits of tourism to be distributed more widely among the community members, both directly and indirectly. More direct local involvement in decision making for example, may enable residents to request for a specific portion of tax benefits from tourism to be allocated toward community development and the protection of the tourism resource base.

Community awareness and transparent information exchange or sharing programs

An ongoing program with community members to obtain feedback and provide information regarding tourism in the community can be used to accomplish the following:

- Provide information on ongoing costs and benefits of tourism.
- Alert members to potential problems and solicit suggestions to manage these problems.
- Foster pride and interest in community assets being used for tourism.
- Solicit comments and ideas on ongoing development projects and proposals.
- Generate enthusiasm and support for tourism activities by ensuring that community organization members stay informed and updated, feeling more in control, motivated and empowered.

Actions to establish communication policies:

- Create tourism awareness programs and documentation (to communicate information on visitors, developments, impacts, benefits, etc. to community members).
- Establish codes of conduct for visitors and communicate the tourism vision (informing visitors as to what residents expect and value can help to minimize community dissatisfaction with visitor tourist behavior and may aid in maintaining local values and culture).

Case Example

Planeterra's partner, Jukil Lodge, developed and owned by the Santiago de Agencha community in Uyuni, Bolivia, encountered some challenges in their first year of operation due to a lack of transparency with all community stakeholders. The managers were not sharing, on a timely basis, the revenues and expenses of the lodge (not out of wish to hide information, just simply due to the learning curve of managing a lodge for the first time). This led to some doubt, mistrust and internal conflict in the community. Planeterra facilitators helped them develop their financial reporting process, as well as their communications process, to create a more transparent system and to lead to a more informed community association.

Learn more about Jukil Lodge [here](#).

Case Example

Planeterra partner, Coope San Juan in the village of San Juan, Costa Rica were unsure of how best to prevent inappropriate behaviour from visiting tourists in their community. The community of rural families provides home stay accommodation and had noticed some culturally inappropriate clothing being worn by travellers in the community after visiting the local river for swimming. In a village where bathing suits are not commonly owned and instead regular clothing is worn for bathing in the river, the locals were shocked at the visitors walking around in their bathing suits (or lack of clothes) when they got back to the families' homes or the community central plaza area. The Planeterra team helped Coope San Juan put together a full code of conduct, including guidance for the community and host families to post and share at the beginning of the visit so that both visitors and hosts could be comfortable and respected. See [Part 2 for discussion on codes of conduct with links to examples in Planeterra's Learning Hub](#).

Learn more about Coope San Juan [here](#).

Communication channels

Larger destinations may want to use communication channels such as social media (and radio or television stations if applicable), community newsletters, public meetings and open government meetings to update, exchange information, and communicate with the community. Face-to-face communication is effective in allowing active interaction between the speakers and listeners but can be time and cost intensive. Mass communication through social media is an efficient means of reaching a larger number of people in a given time and cost frame. In addition, direct experiences by the residents in the local tourism industry can be part of a public awareness program.

Community attitudes, satisfaction and impact surveys

Attitudes and impacts change over time; hence these should be re-evaluated periodically to identify issues and ensure ongoing community support. Written in-person or online questionnaires, informal and formal consultation with identified leaders and key community groups and members, as well as feedback through public meetings are some means for obtaining this information. Be prepared to address dissatisfactions or negative attitudes through informal or formal channels (e.g., public meetings, community newsletter, social media)

Conflict Management

The complexity of the tourism system is characterized by multiple stakeholders, fragmented control over tourism- related resources, and a high degree of interdependence among the various components in the system as discussed in Section 1 of this workbook. Added to this is the high level of uncertainty and complexity commonly associated with assessing the cumulative effects of human use and impact on natural environmental resources. The interdependence of tourism and the environment means that both economic values and environmental values need to be considered in development decisions, alongside the values of the host communities, residents, visitors, and political interests. All in all, tourism issues are complex, and tourism impacts can have serious and far-reaching consequences on the destination.

Tourism destinations, based on the above context, have to ensure that their decision-making and planning processes are designed to help them reduce or manage these uncertainties and complexities. A key aspect is to be able to manage the diversity of stakeholder values, opinions, and attitudes on tourism development, from a conflict management and conflict resolution perspective.

Managing the objections and opinions of stakeholders is critical for tourism organizations involved in development. Controversy can be harmful to the tourism planning process, resulting in delays and community resistance to proposals (due to perceived threats of negative impacts) can make it very difficult for developers to establish a mutually beneficial working relationship in the destination. While a detailed treatment of this vital issue of conflict management is not possible in this workbook, the following points provide some useful direction:

- Anticipate and prevent conflicts where possible.
- Establish mechanisms which enable effective communication, consultation, and participation of stakeholders in development decision making.
- Investigate community values and attitudes and involve the community (through consultation and more direct participation) prior to making commitments on issues that can have a significant impact on the community and environment.
- Identify and involve key stakeholders in the conflict management and conflict resolution processes.
- It is better to be as inclusive as possible. Recognize, however, that this will require managing a diversity of opinions, interests, attitudes, and values from

stakeholders with varying knowledge and communication skills. The participation mechanisms you develop have to be able to deal with these challenges. Different mechanisms may be required for different situations and should ensure that the information is comprehensible to the recipient.

Review

Getting the community ready for tourism starts with an assessment of its needs and readiness for tourism. Evaluating the role of tourism in the community, and the existing level of support for tourism is an essential part of the planning process. Evaluating the community's attitudes, its desires, and aspirations with respect to tourism development is a key action. A community tourism vision statement should be developed, preferably with the help of broad-based input. This statement is a long-term projection of the community's aspirations and ideals, based on its current state and the values that it upholds. A review of the tourism vision statement should be done as part of an ongoing assessment of the tourism activity's ability to help the community achieve its goals. Generating ongoing community support, awareness and involvement in tourism is critical to the success of tourism at the local level.

SECTION 4

ASSESSING THE COMMUNITY'S TOURISM POTENTIAL

Assessing the community's tourism potential requires an understanding of the community's resources, its tourism infrastructure as well the quality of the community's physical environment and the capacity of community members to operate various aspects of a tourism enterprise including delivery of tourism services. This section provides a range of techniques for conducting this assessment and is divided into three major parts.

4.1 The Community Situation Analysis

An important first step to getting your community ready for tourism is to conduct an inventory and assessment of the resources in the community and surrounding region. We call this process a Community Situation Analysis. The importance of this analysis is to understand your community and to determine the opportunities for tourism development, whether development of a new destination, business, or experience.

This Community Situation Analysis process provides you with an illustrative set of community resources which is not intended to be exhaustive but gives you a detailed framework to help guide the inventory process in your own community. Based on this inventory of resources, you must determine what is appropriate for tourism in your community and what your community priorities are. The worksheets which follow in the appendix will allow you to keep a database of your community resource assessment which can be amended as your community develops and grows.

The Community Situation Analysis components include:

1. Community resources - natural, cultural, knowledge, traditions, agriculture, crafts, music, etc. (this can include existing experiences)
2. Tourism infrastructure - services like accommodation, community centres, kitchen, craft workshops
3. Community Design - how the visitor will experience the physical environment
4. Skills and Capacity of community members

As illustrated in Figure 4.1. The community resources inventory and assessment involve determining what your community has to offer visitors. The infrastructure inventory and evaluation involve determining how tourists will be accommodated. The community

design section discusses how visitors will be welcomed into the community and what kind of physical environment they will experience. The skills and capacity inventory takes into account the skills already existing and can help to identify areas of training needed in order to develop a new experience or tourism enterprise.



Figure 4.1: Community Situation Analysis

4.1.1 Community Resource Inventory

The Community Resource Inventory provides guidelines by which to look at your community and region. This will provide the foundation for your assessment. List all of the resources you can think of to fit into the resource categories. Regional resources include nearby attractions, iconic destinations, historic sites, natural sites, other places of interest, special events and other communities. You will determine the size of the region you wish to include in your inventory and assessment based on factors such as proximity and season. Community resources include your natural heritage, cultural heritage, traditional knowledge, customs and traditions, agricultural practices, crafts, music, food, accommodation and other activities (this can include existing experiences such as cultural tours, meal experiences, home stays, handicraft experiences, walking tours, and more)

Conducting this task in a comprehensive manner can benefit everyone in the community. There are a number of objectives for this process:

- To determine what you have
- To determine the location of all your tourism resources both within the community and in relation to other tourism sites or routes (use a map!)
- To assess the tourism qualities of resources and experiences
- To determine what stage of readiness for tourism the experiences and resources are in
- To develop some initial priorities and goals
- To outline an action plan

In this section we look at a number of dimensions or qualities of your community. The worksheets are designed to allow your community to assess a range of factors. They are intended as suggestions, and you will want to adapt them for your own purposes. (See Figure 4.2).



Figure 4.2: Community Resource Inventory Elements

We present you with some examples of some of these components of the community inventory and assessment as a way of illustrating how fine-grained an assessment can be. If you are doing this for an organization that is looking to develop its tourism offerings, you can focus your inventory on the skills and cultural or informational assets you have to share with visitors. Some data may be readily available for assembly; others may have to be collected. You may want to assign the information gathering process to different groups in the community or within your organization. Seek out community leaders who are familiar with historical and cultural information.

We strongly encourage you to locate all of your resources and attractions on a map. You can use this not only to identify where all of your tourism assets are, but also to assess your location in relation to the popular tourism routes and destinations nearby, to help you determine the quality of your location and feasibility for half-day visits. Broader community planning may wish to partner with a university or local government to do a mapping process using Geographic Information Systems. For a smaller-scale initiative, drawing it out as a group activity can help you plan your visitor experience as you will start to think of your location in terms of logistics, how your visitors will move through your space, how much time they will spend at each spot, and with this you will develop your itinerary options.

4.1.2 Community Resource Assessment

The resources assessment process looks at the inventory of resources to gain a sense of the community tourism offering. You will assess each of the resources inventoried which have tourism potential. You can rate the condition of the resources based on criteria which you set up to define as very good, good or poor conditions. Use [Worksheets 4.1 - 4.22](#) to carry out this task. Always remember that you are assessing your community's tourism resources from the perspective of the visitor. Be critical. Outside assistance is always useful in helping you see your destination objectively.

This is where you learn how to fit the pieces of the inventory together: Measuring the potential of your community involves identifying opportunities for product development.

When you have completed this Community Resource Assessment you should be ready to use this information to market and promote your community or organization's tourism offering.

Steps in the Community Resource Inventory and Assessment

It is recommended that you follow the following order:

1. Map: What resources are where (you will go back to this map time and again).
2. Resource Inventory: Categorize your resources including your skills and assets.
3. Resource Assessment: Determine quality and readiness for visitors of each resource.

4.1.3 Community Resource Review

As a community you have some resources or assets that need little or no work and some that need work to reach their potential as tourism resources. One way of determining how well your community is functioning in terms of its tourism resources is to conduct visitor surveys (if you already have visitors or customers) and possibly to employ a consultant or tourism students to carry out an assessment.

The worksheets in the appendix will give your committee a vision of what the community resources are, where they are situated, and in what stage of readiness they are for tourism. You will develop an idea of how the resources relate to one another and what your tourism development priorities are.

Completion of the resource inventory and assessment means that you are ready to establish your short- and long-term goals. Establish goals and actions for each of the community resources that are priorities for tourism development.

You are now well on your way to creating a community ready for tourism.

4.1.4 Tourism Infrastructure Inventory

For the most part, existing community services and resources should be used in a sustainable tourism strategy, although their capacity and suitability for visitors must be

evaluated. New or improved infrastructure might be needed depending on the growth of visitor numbers expected and the nature of tourism development in the area and the type of guests you want to receive or are most likely to receive. Always remember that building infrastructure of any kind is something that you should only undertake when you are convinced that there is visitor demand and that your infrastructure does not become a long-term liability to the community.

Infrastructure in this context means all the services and facilities a community or destination requires to accommodate visitors and to ensure they have a safe, comfortable, enjoyable and memorable experience. A checklist is provided, with notes on key issues, (see Figure 4.3) to get you thinking about infrastructure resources. Inventory and assessment forms are included in this section to help you set infrastructure priorities for tourism development.

The inventory should be constructed to help answer the following basic evaluation questions:

- What is the capacity? (Related to visitor numbers)
- Is it suitable? (Related to visitor types and their needs)
- Is it the appropriate quality? (Related to marketing goals, including positioning, and to customer expectations)
- What improvements or management strategies are required?



Figure 4.3: Elements of the Tourism Infrastructure

What Is the Capacity of Our Infrastructure?

This is an important part of the assessment of readiness for visitors in terms of the number of people that can be accommodated per day, per week, per month, by the

existing facilities or for planning development of more facilities such as rooms, campsites, transportation, or dining facilities. It is also a critical issue in terms of impacts, as many destinations and communities have found that growth in visitor numbers imposes major stress on services, resulting in problems for residents and the need for expensive developments. Sometimes it may result in reduced access to basic necessities like water during dry season, or food during seasons where there are guests but less crops available. This has been labelled as overtourism. On the other hand, tourism can be the catalyst for obtaining desired improvements. The main challenge is to plan the process and not get caught by surprise. Careful attention to capacity can ensure that existing facilities and services are used efficiently and even profitably, and also that residents' needs are taken into account and prioritized.

Peak demand problems often arise because tourism is usually seasonal. In mass tourism destinations, it is common for tourist numbers to greatly exceed resident numbers, resulting in overuse of basic infrastructure. In these cases, everyone suffers and discontent within the community is heightened. Sustainable tourism attempts to avoid peaking problems. By leveling demand throughout the year, creating experiences and marketing the kinds of experiences that can be had in all seasons, available services can be used much longer.

Basic types of capacity must be considered with regard to infrastructure. In some cases, there will actually be shortfalls in capacity, such as where water supplies are inadequate for anticipated peak demand. In these situations, a tangible solution is required or a serious problem results, like in our example. In other circumstances the issues are less clear, such as where visitors contribute to traffic congestion, or issues with sanitation and excess waste, particularly plastics, which are often difficult to recycle, and the problem is left with the community to deal with. These problems can be endured for a time but will definitely contribute to resident and visitor dissatisfaction if not planned and managed.

Is the Tourism Infrastructure Suitable?

Mass tourism requires a full range of services, but community tourism can better focus on specific infrastructure requirements thereby lessening the need for costly and at times unnecessary investments by the community. For example, all visitors need toilets and food, no matter what level of service you are providing! But if you are providing a community home stay, you will be required to meet some basic service and safety requirements, and not need the full range of infrastructure. Sports-oriented visitors require specific types of recreational facilities while arts-oriented visitors use quite different facilities.

To answer this question, some visitor research is needed. When target market segments are known in advance, selective surveys can determine their most likely pattern of infrastructure use, as well as their priorities. Do you know who your target markets are, and who your potential customers are? If not, there is a section for that. Visit Section 8.

Is the Tourism Infrastructure the Right Quality?

Visitors and potential tourists should also be asked to comment on their quality expectations, as different types of visitors expect lesser or greater quality and levels of service. A strategy to attract high-end customers might also require heavier investment in services and facilities. For rural communities, targeting adventure travellers, there will be an expectation of a rustic experience, so luxury is not necessary, but cleanliness, comfort, and authenticity in culturally appropriate design will always be important.

As noted previously, market research, or discussion with future potential customers, local tour operators, local hotels - those that know the customers that visit areas nearby - will be good sources to help you determine the quality of services and infrastructure that must be supplied.

Inventory and Evaluation of Tourism Resources and Infrastructure Factors

The following table provides a useful check list of tourism resources and infrastructure factors.

Access, Transport and Parking	<ul style="list-style-type: none">• Adequacy of roads for all modes of transport to and within the area - can your visitors access your location? What kinds of vehicles can travel the road to get to you?• Potential for congestion or accidents• Potential disruption of bicycle use or walking patterns for residents• Parking for cars, motorbikes and buses• Potential pollution problems (e.g., noise, exhaust fumes)• Touring routes for walking, cycling tours• Off-road vehicle areas if applicable
Accommodation	<ul style="list-style-type: none">• Adequacy in terms of numbers of beds/rooms/units (this can be different depending on whether targeting individuals or groups)• Seasonal supply variations - more capacity needed in high season, but does this warrant building more or managing numbers?• Type, quality, and price related to anticipated market segment demand
Activity Venues (See Cultural Resources Assessment for forms)	<ul style="list-style-type: none">• Parks and nature preserves and their ecological carrying capacity• Community centres, kitchens, demonstration areas suitable for hosting groups• Recreational facilities (especially their utility for events)• Access to water and public lands• Trails and recreation resources• Entertainment facilities (usually private sector)• Meeting and convention venues• Festival and event places (indoors and out)• The range of activities that can be undertaken, by season, related to air, water, land, and built resources• The compatibility of various existing and potential activities• Potential impacts of activities• Attractions (see cultural resources assessment for forms)

	<ul style="list-style-type: none"> • Natural and cultural resources which can attract visitors • Utility in attracting target market segments • Capacity, by season and type of use • Ownership, permits for use
Convenience and Comfort	<ul style="list-style-type: none"> • Availability and cleanliness of functionality of toilets • Rest and picnic/eating areas with sufficient tables and chairs • Wifi access points • Food service facilities (kitchens, refrigeration) (types, quality, accessibility) • Viewpoints • Banking, money exchange, mobile credit card transaction capability
Cultural Resources (See Cultural Resources Assessment for forms)	<ul style="list-style-type: none"> • Cultural heritage, traditional knowledge and customs to be shared (or not shared/kept sacred) • Food, music, art, handicrafts, traditional ceremonies and festivals • Built heritage (architecture and community spaces) • Historic sites • Cultural landscapes • Museums, art galleries, concert halls, science centres, and other public facilities • Hospitality/friendliness of residents
Energy	<ul style="list-style-type: none"> • Adequacy and reliability of supply • Sources (and related resource use and pollution issues)
Financial Resources	<ul style="list-style-type: none"> • Private funding (lending institutions, investors, venture capital pools) • Public sources (loans, grants, incentives)
Health and Safety	<ul style="list-style-type: none"> • Adequacy of medical facilities and emergency response (especially related to local recreation opportunities, like boating) • Police and fire adequacy (especially regarding peak demands and special; other community security protocols) • Safe drinking water • Evacuation routes for emergencies • Safety equipment (depending on activities) • Locks on bedrooms (for home stays, sometimes overlooked) • Fire alarms in accommodation • Lighting on paths or roads (especially in tourist-traffic areas)
Human Resources	<ul style="list-style-type: none"> • Labor supply (types, volume, quality) • Attitudes toward tourism and related jobs • Training facilities and programs • Gender equality • Fair pay (living wages)
Information/Visitor Services	<ul style="list-style-type: none"> • Adequacy of signage • Information booths or visitor centres • Brochures, maps, and other material for visitors (see cultural resources assessment for forms) including code of conduct • Availability of guides and interpreters (language considerations)
Political Resources	<ul style="list-style-type: none"> • Policies and programs supporting tourism • Regulations impeding tourism development

	<ul style="list-style-type: none"> • Political attitudes and party platforms
Shopping	<ul style="list-style-type: none"> • Range of goods and services • Authentic local arts and crafts hours and days of operation
Travel Services	<ul style="list-style-type: none"> • Potential partners - local tour operators, hotels, attractions, local tour bus companies • Outfitters and equipment rentals • Guides and interpreters
Water and Sewage	<ul style="list-style-type: none"> • Water and sanitation availability and adequacy, particularly due to extra usage when visitors in community or onsite or at peak demand periods • Environmental impacts of potential overuse • Emergency water supply

Infrastructure Inventory and Assessment Forms

After examining the checklist of infrastructural tourism resources, you should be prepared to do an inventory and evaluate/assess their readiness for tourism development. The assessment forms which follow in the appendix will guide you in this process.

You may want to approach infrastructure resource professionals to complete some of the forms. They may be in a good position to make a fair assessment of the improvement or development needs to meet the influx of visitors.

An inventory form for each type of infrastructural resource is supplied. On this form you should brainstorm all of the resources you can think of. Determine the importance level of each for tourism development. This will help you not only to decide which resources need assessment, but also help to set short term and long-term goals for infrastructural development to meet tourism needs.

A resource assessment form accompanies each inventory sheet. You will need to make copies of this form for each resource to be assessed. Address each question with regard to the particular resource being examined. This will help you determine in what state of readiness for tourism this resource is.

Once you have inventoried and assessed your infrastructural resources you will need to align the improvement or development required with community goals. This will help to put tourism development into perspective for your community. You may decide that development is necessary, or you may discover that visitor management to meet existing capacity is a better alternative. This will be aided by prioritizing improvement and development projects on this form.

Once you have inventoried and assessed your infrastructural resources you will need to align the improvement or development required with community goals. This will help to put tourism development into perspective for your community. You may decide that

development is necessary, or you may discover that visitor management to meet existing capacity is a better alternative. This will be aided by prioritizing improvement and development projects on this form.

Now that you have prioritized infrastructure resource projects in the community context you can determine short- and long-term goals. Voila! You now have this framework for an infrastructure action plan to meet sustainable tourism goals in your community.

4.1.5 Physical Environment Assessment

Design is an important selling feature for any product. In this case your product is your destination. As a rule, attractive communities will be more likely to draw people in than those that are unattractive. Physical improvements are a quick way to improve the image of a place and obtain public attention, though they should be run with other programs aimed at bolstering the local economy and community. Good design will usually last, allowing for greater possibilities for re-adaptive uses in the future. Outlined below are some basic points that one may consider when looking at ways of improving the physical environment of a town or community if it is felt that it is in need of some form of physical upgrading.

Recognizing the Assets

The task here is to look at your community and identify features which the community feels are important, and which distinguishes it from others. It is also important to consider outsiders' views as they tend to be impartial and recognize elements that locals may take for granted. It is known that first impressions play a huge role in determining how a place is viewed. It is critical to know where these first impressions tend to be formed and how to improve them.

Building structures are usually the most notable elements. Also look at structures or locations that are important for natural or historic reasons or where major events that are culturally important occur. Many existing buildings and areas can easily be reused and readapted for new uses rather than having to erect new buildings. This provides continuity in the community and maintains some of the history and character of built environments. Indeed, many of the growing successful areas in many towns, center around the older districts which have been saved and reused.

It is worth considering conducting a 'Mental Map' exercise. This involves asking people to provide directions from two or more set points within the village or by drawing a visual map using features rather than street names/numbers. This will help to highlight buildings, locations, etc. that people most commonly associate or identify with the community. A survey on what structures people value most or notice is also a worthwhile exercise.

Identify Areas

The following are the assumed areas where an image of a place or first impressions tend to be formed. With the above in mind, using a map of the village/community and identify:

Gateways and entrances

- Principal routes to enter the community
- Core commercial or central areas, areas of character, and any key features
- Few towns have erected significant welcome signs at the boundary of their communities, usually at the end of the built-up area or where the town begins, informing people that they have arrived, while creating a good impression. It is possible to drive through some communities without any significant impression of where you passed through other than it being 'another town'.

On the map, identify key locations felt to be appropriate 'entrances' into and around the community, especially:

- The boundary.
- Where the buildings end and open space begins.
- Where the commercial or central gathering areas are
- The locations where one enters the 'unique areas'.

The next task is to determine what sort of signage is appropriate, i.e., a simple name sign, something elaborate or keep the existing signs.

Once routes have been identified, look at them and the surrounding area and assess what their problems are, including:

- Where possible new landscaping could occur.
- Where more trees could be planted.
- The identification of where fences/hedges along the way could be improved.
- Where the commercial areas and central gathering areas could be tidier.
- The identification of those buildings along the route that could be cleaned up or replaced.
- Where vacant sites could be tidied up, etc.

Review

As a community you will have some resources which need little or no work and some which may need development to meet the expectations of your visitors and create a memorable experience. The exercises in the appendix should give your committee a vision of what the resources are and what stage of readiness they are in for tourism. You should have an idea of how the resources relate to one another and which ones are tourism development priorities. You will use this data for your tourism plan.

SECTION 5

DEVELOPING MARKET-BASED COMMUNITY TOURISM PRODUCTS AND EXPERIENCES

In this section we discuss the process for developing sustainable community tourism products and meaningful, memorable experiences for visitors. This process begins with establishing market demand, understanding your potential market segments and ideal customers and the types of products needed to attract them to your community. Following that, the process for product and experience development can begin.

5.1 Introduction

Every community is unique because of its history, people, and character. When discussing potential tourism opportunities for a community, a major foundation must be to preserve authentic elements. There are many dimensions to the product and experience development process and determining what kinds of products your community wants and needs. The first step is looking back to your community assessment and situation analysis regarding what you have available that you can turn into tourism products. Also very important is to review your vision, goals and objectives and thinking about your ideal customers - who do you want to visit? Then conducting market research to determine what demand there is for your potential products and your location is essential before any product development begins.

See Section 6: Sustainable Community Tourism Marketing for the market research process

The community or destination may be building out entire tourism value chain elements including hotels and other forms of accommodation, cultural heritage sites, new nature trails and parks, festivals and events, or new tourism experiences based on cultural traditions and assets that exist in the community. In most cases, some new physical infrastructure will be required, and new experiences will be developed. We have therefore focused on the following areas in the second part of this chapter:

- The process and feasibility of physical infrastructure development
- Developing sustainable accommodation
- Guidelines for community event development
- Community tourism experience development: Meals, Tours, Handicraft Experiences, Home Stay Programs

5.2 The Tourism Experience and Visitor Expectations

Creating products and experiences for today's visitor is not easy, but it is easier than we once thought. Tourism products and services in the past were often developed on the premise that the tourist wanted something that was similar to home or just made for them. This led to the development of many cookie-cutter hotels and "tourist traps" - places that were created that do not reflect the real culture, the living culture, the way locals live, but conjured experiences. Today's travellers are looking for authenticity - they want to experience local life in a destination and therefore community tourism offers visitors a fantastic opportunity to do just that. Therefore, over-thinking tourism experiences is not necessary. Some basic elements should be incorporated into all tourism experiences, like quality, consistent customer service, safety and cleanliness, and good management of people's time. But other than that, the most important element to incorporate is connection to the local culture. This can be done both through the physical environment and facilities as well as the interaction with hosts, guides, and local businesses. For infrastructure this means taking care to build with local materials and designs that enhance the natural environment or reflect cultural artistic traditions both historic and modern. For interactions during experiences including meals, handicraft demonstrations, and tours, this means storytelling, incorporating personal and community history into activities, and generating a meaningful connection between host and guest. As you reflect on your vision, your potential customers, your assets as a community in terms of what you have to offer and what you can build from, let these principles be your guide.

A community or enterprise should start by asking the following questions:

- What is the community or enterprise willing to and can offer to visitors?
- This should be based on unique dimensions of the community that would provide a visitor insight into the special character of the place – the community's unique selling proposition.
- Who is willing to be a part of the tourism experience?
- How will the tourism experiences be governed?
- What is the division of responsibilities from delivering the tourism experience to the planning and evaluation of the effectiveness and sustainability of the experience?

Once there is a framework for the type, extent and people involved in the potential experience, a criterion should be developed to evaluate the sustainability and viability of potential experience options.

The community's or enterprise's unique selling proposition should be thoroughly discussed, and its potential impacts researched before it is launched. How do residents or a business want to be portrayed? One needs to assess whether it will attract the wrong kind of visitor.

Each community or destination can develop its own experiences, taking into account its resources, values, needs and preferences. The result should be an authentic community tourism experience which will be attractive to those travellers seeking unique local experiences. Similarly, each destination can create opportunities that attract informed, respectful visitors who want to preserve the area's natural and cultural beauty.

There are different experience strategies that can be considered that meet the desires, needs, abilities of the community. From this, a target market can be determined, and an experience can be tailored.

It is always important to consider what experiences and components should be highlighted. The following criteria can be considered:

- Reflects unique conditions (every place should be different).
- Authentically portrays the culture or cultural diversity of the area.
- Keeps development in scale with the community and environment.
- Ensures that developments also meet community needs (e.g., through joint use).
- Designed in keeping with local building traditions.
- Attractive and competitive in the long run, not a passing trend.
- Aimed carefully at target segments.
- Informs all visitors of your plans, goals, and management approach.
- Encourages visitors to participate in sustainable activities and avoid others.
- Provides high-quality experiences.

5.3 The Process and Feasibility of Physical Infrastructure Development

Overall direction and priorities of physical development stem from the community tourism plan, including new product ideas and concepts that might have been generated through the planning process, professional advice, or actual development proposals. For large-scale infrastructure projects, a concept should be subjected to a limited pre-feasibility evaluation to determine if it is appropriate in the context of the plan and if it has a reasonable chance of successful implementation. Afterwards, and for any infrastructure building for community tourism, a feasibility study should be conducted. This can serve as part of the process for assessing the potential for the tourism product as it contains the steps outlined above for market identification and forecasting, as well as other steps related to physical services development.

A detailed action plan will be required, specifying the prioritized developments by type (e.g., infrastructure, attractions, services), a schedule for start and completion, designation of who has responsibility for the action and the resources committed to it (e.g., a budget or target cost). Action plans can be updated based on progress reports, resources available, and changing priorities or conditions.

Implementation of tourism development is usually a public-private partnership or funded initiative, with the community focusing on infrastructure and satisfying regulations, permits, etc. and the private sector constructing attractions and providing visitor services. For smaller community infrastructure projects, the entire project may be managed by the Community Tourism Enterprise, in which case a sub-committee responsible for overseeing the construction process may be required. If it is a funded project, there will likely be staff from the funder overseeing the process jointly with the community tourism organization.

Planeterra has assisted several communities with undertaking physical infrastructure processes via a joint management structure. Typically, this has involved contracting a small construction company, assigning a Planeterra field manager to oversee the process, and to work with the community tourism organization's leadership to assign a community member to be present and report on progress daily, weekly, and monthly to both Planeterra as funder, as well as back to the entire community who are often participating in work days to clear land, collect materials, etc. This kind of communal participation process is traditional in the communities in which Planeterra has worked, ranging from Peru to Bolivia to Guatemala to Thailand. It is not the main form of management of the project; ultimately that falls to the construction company/contractor and the field manager to ensure completion, but it is helpful in continuing momentum, building ownership, and anticipation for completion and beginning of tourism operations. Another method that has worked well has been subcontracting a local non-profit organization well-versed in community development and small-scale construction projects to function as the day-to-day project manager, reporting back to Planeterra weekly on progress with intermittent visits by Planeterra field managers.

Having decided to develop infrastructure for tourism, how is it to be realized? For some services, only public or private investment is feasible, whereas a public-private partnership can be used to achieve other objectives. Periodically, government sources of loans or grants for tourism infrastructure development are available, as can be international development aid funding. Usually, this assistance is tied to the preparation of a strategic plan and/or feasibility study. Being ahead of the game is advantageous and if there is an opportunity to plan infrastructure needs including priorities and timelines, and funding pursued based on this plan, success in obtaining financing is more likely.

There is little point in developing new infrastructure for tourism if a deficiency in related basic services will lead to problems for residents or visitors. As mentioned previously, tourism has an "invisible burden" often causing stress on existing infrastructure or in some remote communities, causing residents' needs to go unmet (such as in the case of water scarcity in a Thailand community). Therefore, attention to the unglamorous underground services like sanitation is a top priority, as are roads, health and security, and comfort and convenience. These are typically all public services, but often in remote

communities the public services are not able to provide all that is needed, and the tourism project must include the development of such basic services (like water and waste management). Where larger scale tourism development imposes major costs, it is certainly legitimate for the private sector to pay a fair share and contribute. The mechanisms for this can include local improvement or property taxes, direct cost sharing or requiring developers to provide all required infrastructure as part of the project costs.

Some governments take an active role in attracting investment and facilitating tourism development through a number of vehicles:

- Provision of land (free, subsidized, or serviced at public expense).
- Cash grants or loans (to overcome financing obstacles).
- Relaxed zoning, building or other regulations.
- Fast-tracking through the approvals process.
- Forming public-private partnerships

A careful feasibility and impact evaluation is required before communities engage in the development of physical tourism infrastructure projects. This should be done in the context of a sustainable tourism strategy so that long-term costs and benefits are given priority over short-term advantages.

5.3.1 The Feasibility Study

The most common meaning of feasibility is: “can we do it?” This implies a number of sub-questions, including affordability, practicality, and the likelihood of success. But feasibility studies must also consider the desirability of the project in light of plans, goals, and possible impacts. In other words, it must be feasible economically, environmentally, politically and socially. The development might be economically and physically feasible, but unacceptable for other reasons. Each feasibility study involves the steps described below:

1. **Statement of Project Objectives:** What is its purpose and specific contribution to sustainable tourism development? Is it to make a profit or to be a public service? Who will own and manage the development?
2. **Market Research:** Usually experts are hired to determine the potential demand for or estimate use levels of the project. This involves assessment of trends, competitors, complimentary facilities or services, and a segmentation of the market to determine the most likely or desired target groups. The entire market mix must be considered.
3. **Product-Market Matching:** In sustainable tourism, the desired target markets must be identified and attracted to the project - developments are not encouraged if they are mass-market oriented or will appeal to undesirable segments. Some developments might prove unfeasible because there is insufficient demand from narrow segments. Unfortunately, many businesses start off with targeted marketing but evolve to mass-marketing because it is easier, more profitable, or in response to growing demand.
4. **Location Analysis:** Will the project be accessible and visible? How will users get

to it, and will the travel modes present any problems (e.g., congestion, need for an airport or new roads?) How long will it take customers to reach it, and will the trip be safe, comfortable, and affordable? Where are the competitors?

5. **Site Analysis:** Can the proposed site physically and ecologically support the proposed development? What are the possible impacts, and can they be prevented or ameliorated? What will it cost to develop this site, as opposed to alternatives?
6. **Demand Forecasting:** Given the market research and segmentation, actual visitor/user numbers plus average spending will be made. This is a critical step in determining financial feasibility. All too many facilities are constructed with over-optimistic demand forecasts, resulting in financial failure especially in public-sector developments. It is better to be conservative and to pay attention to the performance of similar, existing projects.
7. **Impact Forecasting:** The community has a right to know what impacts are likely to result from every development, and cumulatively from all changes over a period of time. The feasibility study should identify both direct and indirect impacts and provide the technical material to enable reviewers of the study to draw their own conclusions on relative costs and benefits.
8. **Financial Feasibility:** It might prove undesirable to proceed with a project on the basis of market research, site analysis, or impact forecasts, but most studies will nevertheless include a detailed financial forecast of revenues and costs. The ultimate bottom line (profitability or at least breaking even) will depend on many factors, some of which are usually outside the scope of consulting studies (i.e., assumptions of sound management; personal and corporate taxes; debt repayment and interest rates; and factors which affect demand assumptions. Eventually private-sector developers will apply their own criteria for determining the desirability of proceeding and meeting a desired rate of return on investment is important. Public sector projects should at least break even on operating costs, but many are justified as public services or investments in growth.
9. **Social and Cultural Acceptability:** Is the proposed project or opening up of a site to tourism acceptable in terms of local values and potential social and cultural impacts?
10. **Design:** If it is a go, the project must then progress to a detailed design or master plan, followed by the approval process.
11. **Political Favourability:** Is the project feasible given the political climate in the region and country?

5.4 Financing Mechanisms for Getting Your Tourism Project Built

There are several sources for funding to build new infrastructure or renovate existing facilities. Local government, national government tourism programs, international development organizations, country embassies, development banks, as well as private investment are potential options to seek. An expert can provide guidance and assist on the research for this stage, particularly if it is a substantial cost and/or large-scale

development. Loans and grants are both options; however, grants are more common for rural community smaller scale projects based in countries with support programs. Certainly, they are more desirable for communities with smaller scale tourism programs planned that will not generate enough profits to pay back loans. Loans are good options for larger scale programs that are forecasted to generate profits that would enable loan repayments.

5.5 Sustainable Accommodation

Traditional forms of accommodation can adopt practices to become more environmentally sensitive through international certification programs or by following sustainability guidelines. Sustainable accommodation can take the form of an ecolodge, where the full design and operation is sustainable and made from local materials, with the least impacts in terms of energy and water use. It can also be in the form of more traditional or modern building styles with elements of sustainability, eco-efficiency or green building principles.

Accommodation is an important part of the tourism industry in terms of attracting tourism and potentially threatening it. Hotels, lodges and guesthouses make a significant impact on the environment, irrespective of the size, scale or level of the operation. Whether newly constructed hotels, lodges, guesthouses or family homes (vacation homes, traditional BnBs, Airbnbs, etc.), accommodation facilities increase the demand on existing water, sewer, waste disposal and energy use and can cause serious deterioration to the physical and /or social environment. Governments have addressed the environmental problems posed by hotels and resorts by enforcing legislation and requiring environmental permits. In addition to government requirements, there have been growing expectations from guests about responsible/sustainable management practices including the treatment of employees and contributions to the local community. Encouraging or requiring accommodations to ensure certain environmental and social standards benefits not only your visitors but also protects your community's residents.

In regard to building and operating sustainable accommodations and obtaining eco certifications there are many resources available. Similarly for operating green/sustainable community events, which can be found in the Appendix.

5.5 Community Tourism Experience Development

When looking to develop a new community tourism experience there are several important things to know about what visitors are looking for, how you can make the experience meaningful and memorable, and to determine what you would like to share and not to share, about your culture and your community.

Based on your study of market demand, what you identified your community's tourism assets are, who your customers may be (and who you want them to be), you can start to design your experience.

The main steps to consider part of the development process are:

1. Match customer profiles and logistical implications (for multiple customer profiles) to community's assets and potential unique offerings
2. Consider your supply chain: what do you need in terms of resources to provide the experience
3. Cost and price your experience - see the following section for more on pricing
4. Create an itinerary - even if it is an accommodation or a one-hour meal experience, plan out the times and content of the experience from the time the visitor arrives until when they leave)
5. Develop the stories - Stories your hosts tell, your guides tell, are important for engaging visitors and making the experience memorable.

Planeterra has collaborated with many communities and community organizations on their experience design, primarily for planning to host group tours. One such example was the development of the TWE - Together We Earn program in Kerala, India. The ladies that run the TWE non-profit organization in Alleppey had never considered tourism as a way to earn money for their programs. They focused on women's empowerment through economic and cultural activities such as creating new local catering business opportunities as well as cultural performances. When Planeterra's Asia program manager discovered them, visiting their community centre complete with kitchen and rest area, she noted that they had the potential to welcome international (and domestic) visitors for cultural experiences and meals. Working with G Adventures' product development team to determine the needs of the various types of tours that pass through the area, the traveller profiles, the logistical considerations (such as distances from the route taken by groups and the time available for experiences) the experience was developed. Today the women at TWE provide a traditional meal experience for traveller and share their culture through traditional folk songs.

Learn more about TWE [here](#).

SECTION 6

RESPONSIBLE COMMUNITY TOURISM MARKETING

This section examines responsible tourism marketing for community tourism, highlighting effective, educational, and meaningful opportunities to engage with target audiences and devise a strategy that enhances the perceptions and recognition of your enterprise, destination or community. The section is organized in six parts as illustrated in Figure 6.1.

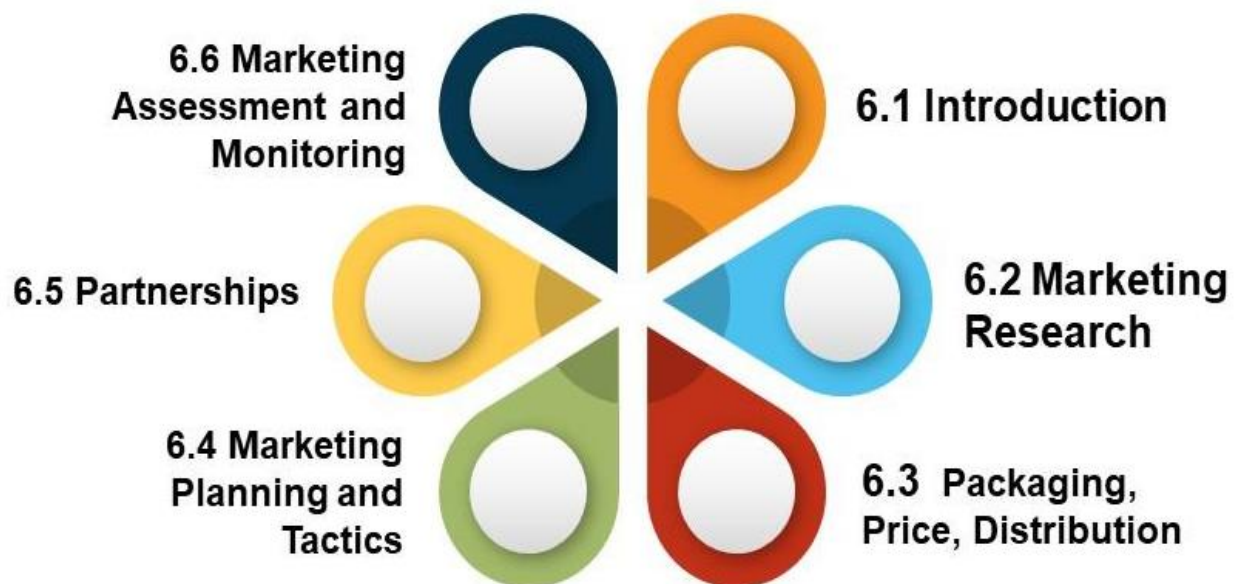


Figure 6.1: Section Organization

This section recognizes that many enterprises and communities will not always be in a position to carry out all of the steps necessary to better understand their marketing environment. The data collection and analysis and strategy development processes and methods are not all activities that will be completed by the community or enterprise. Rather, through strategic partnerships with tourism and travel associations and businesses, a community will be provided with access to expertise to complete the nuanced marketing tasks. The following is meant to help provide an understanding of the process and the potential of how marketing activities can benefit overall community tourism development and implementation as well as ensuring that enterprises and communities are effective consumers of marketing information.

6.1 Introduction

While traditional marketing places heavy emphasis on the potential visitor's needs and desires, sustainable tourism marketing begins with better understanding a community's or enterprise's values and goals.

The traditional view of marketing focused on advertising, surveys, events, brochures, etc. Marketing, as a discipline, has evolved alongside business and other social developments. Marketing is seen much more as a business tactic that provides insights and purpose behind a tourism concept or experience. This section will provide guidance on how to infuse data-driven tactics into the larger business/community tourism plans.

Preserving the integrity of the natural and cultural resources of the community is at the foundation of responsible community tourism marketing. But attention must also be given to ensuring that the tourism business is competitive and economically sustainable, and that the community will continue to support tourism and the changes it may bring.

It is important to define and understand potential visitor groups given that visitors are not always interested in the host culture or its environment, and that not all forms of tourism or types of visitors are compatible with local goals and conditions. As communities look to grow their tourism business, the mass or mainstream market does not provide sustainable or respectful engagement opportunities unless the product or service being offered is very controlled in terms of numbers and codes of conduct around visitor behaviour and authenticity of the experience is highly managed. It is best to explore a high quality, high yield visitor (in this instance high yield refers to social, cultural as well as economic dimensions) that is looking for an opportunity to gain experience about a place and its people and to positively contribute to the prosperity of the place.

For the most part, the experience of the recent past is that mass tourism is incompatible with a sustainable tourism marketing strategy. We can define 'mass tourism' as being large-scaled and oriented toward the widest possible range of visitors. It is true that many destinations are quite successfully pursuing mass tourism, but the cost is extremely high and negative impacts can easily outweigh the benefits, at least from the residents' perspective. Once set in motion, it will be difficult or impossible to reverse the process of mass tourism development. It will result in external control, and often local businesses and residents being pushed aside.

One alternative strategy is to concentrate on niche marketing, or the pursuit of those market segments that will meet the community's sustainable tourism goals. Most people can be attracted to a popular beach resort because of the universal appeal of sun, sea, and sand, but in general there are particular types of travellers, and a lesser number of them, interested in bird watching, local festivals, local food or farm-stays. Attracting this

type of visitor calls for a more focused marketing effort. That said, these kinds of local experiences are increasing rapidly in popularity, and therefore require even more strategic thinking about the types of visitors, and the volume, appropriate for the community or enterprise in development.

It can be argued that the tourism industry requires constant growth in order to succeed but sustainable tourism marketing holds firm that this is simply not the case. Mass marketing can often lead to a 'boom and bust' cycle that typically results when high levels of demand lead to oversupply (many accommodations built often in the same area, for example), resulting in an overall decline in business for everyone, and loss of cultural identity of the place. From the destination's point of view, (especially the residents' point of view) it is far better to concentrate on one or a few prime visitor market segments and avoid the pitfalls of mass marketing.

A sustainable approach to tourism marketing still requires good market research, detailed segmentation to identify and obtain the optimum target markets, attention to visitor needs and preferences, and the delivery of high-quality experiences and services. It is just that the experience/market matching process places the community and its environment as a primary objective. This assumes the industry and community are in partnership and agree on a common set of goals and processes.

To help shift from a marketing-only driven mindset to one that is focused on the sustainability and needs of a community, there are key considerations to be made as part of the process. The process can begin with understanding the market using a SWOT approach, analyzing the strengths, weaknesses, opportunities and threats. There is a need to understand the community landscape and what the residents need. From there products/experiences most suitable to be developed can be determined. Finally, one can identify targeted visitor segments and use the appropriate marketing tactics to reach those audiences.

The marketing process must be considered from the beginning stages of tourism development and planning. For a truly sustainable marketing model to be devised that meets the needs and resources of a community, marketing needs to be a major consideration from the onset. This allows for careful market research and segmentation to take place, which in part informs the development of experience and services. Utilizing a data-driven approach ensures experiences and services will be developed to address the visitor audience's requirements and create a meaningful opportunity for engagement and tourism activity.

Community Engagement

Only through comprehensive and ongoing public input can the community or enterprise express its values regarding tourism development and then formulate realistic goals. At a community level a 'visioning' exercise might be the best way to start this process, as it will involve all stakeholders and concentrate on fundamental values, not specific developments. Marketing principles and goals follow from the general vision. It is equally important for individual enterprises to ensure that there is a clear vision for their operations supported by all of their relevant stakeholders.

6.2 Market Research

Market potential can be evaluated in several ways. Basic research into tourism trends is the starting point, and usually government agencies, industry associations, and educational institutions can provide this data. It is more difficult, however, to obtain reliable demand-related information specific for certain areas, communities, or businesses. In these cases, original market research is likely to become necessary.

It is not sufficient to know that demand for an experience exists. It must be shown through research and use of sentiment analysis that a proposed development can capture an adequate share of the market. Many good ideas fail because of a mistaken assumption that demand follows supply. Always important to remember that there is a great deal of competition for the consumer's attention, time, and money.

Asset Discovery

While the essence of a community cannot be determined based solely on the number of heritage sites or the religion practiced, it is still important to take account of the tangible and intangible assets within a community, which would include religious sites, heritage sites, notable architecture, etc. The documentation of these assets will be used to help inform experience development at a later stage of the discovery process.

Sentiment Analysis

Sentiment analysis is conducted using primarily social media and is a method used to gauge opinions of an individual or group. This information can also provide details on other perceptions such as reputation, visitor experiences, brand, and experience reputation, etc. This analysis provides direction on how or why an experience is developed and for whom. Sentiment analysis uses scoring, monitoring of internet conversations and language to quantify attitudes, opinions, emotions related to a specific topic/word.

Scoring

A simple scoring mechanism can be developed, such as counting the number of mentions of a specific word/topic on a specific social platform. If the topic is highly discussed, then it would require determination on the positive, negative, neutral sentiment that the individuals, groups are discussing.

Analysis of the information from the data collection process is where the most value comes from. If the information collected points to a general desire of culture-motivated visitors to interact and experience everyday life in a destination, then this will help to inform how an experience is developed, positioned, partners engaged, and then marketed.

Sentiment analysis provides many of the structural considerations of a traditional survey such as collection of a representative sample of visitors by type, geographic location/origins, activity, interests, etc. However, sentiment analysis goes beyond the restraints of a survey to reach a highly diverse group of potential visitors and collects data that they have shared openly on social media. This is at times more accurate and reflective of true sentiment of a destination or experience than a survey.

6.3 Market Segmentation

The potential market segmentation overall analysis can be initiated by mapping out the following factors:

- Understanding what existing and potential visitors want (in terms of benefits and experiences, experiences and services).
- Identifying the appropriate target market segments.
- Matching experiences to potential market segments.
- Assessing visitor reactions to the experience and services (i.e., satisfaction); learning about perceptions of your experiences relative to competitors.
- Knowing what the competition is doing.
- Understanding the relative importance of all elements in your marketing mix, (e.g., how important is price?).

In marketing, the key is always to focus on what potential visitors want, need, and will demand. If a destination wishes to develop ecotourism, the question becomes: who will purchase ecotours, and will there be sufficient demand to justify the investment? (Niche marketing requires that careful attention be given to measuring potential demand from the target segments and the means to effectively reach them.)

Segmentation and selecting target markets is a crucial part of this process since demand will come from specific segments of the global marketplace. Given that sustainable tourism marketing is the opposite of mass marketing, extra care must be taken to identify and attract appropriate market segments.

What are sustainable market segments? More often than not, they are high-yield tourists. Many visitors in a mass market environment do not stay long or spend much, but they require lots of services - those are low-yield tourists. High-yield visitors are those which typically stay longer and spend more, and especially those which can be attracted in the off-peak seasons. In some particular situations, the high-yield visitor

might not stay long at all, nor use local services, but will spend money on attractions or shopping. Yield per visitor is a much more important measure than the raw number of visitors to an area. Some ways of measuring yield are suggested below:

- Average visitor spending per day/night.
- Average length of stay.
- Use of accommodation (jobs are created in serviced, commercial accommodation; second-home owners have less economic benefit).
- Off-peak versus peak seasons (i.e., maximizing efficiency).
- Where they typically travel and stay (i.e., maximizing the spread).
- Where they spend their money (e.g., spending in locally owned shops will have more local economic impact than spending in chain stores).
- Purchase of certain packages (as opposed to doing things on their own).
- Repeat versus first-time (repeat visits ensure marketing efficiency).

Yield must be defined contextually, using criteria and measures appropriate to the destination. The basic principle, however, is the same everywhere: concentrate on increasing the yield, not on raw visitor numbers.

Yield alone is insufficient to guide the sustainable marketing strategy - quality must be pursued. The tourism industry knows that quality service and quality experiences are essential in attracting and satisfying visitors, and this principle is the same for a sustainable strategy. Who are quality tourists? Little thought usually goes into that question, yet it is vital for sustainable tourism marketing and especially important for community tourism.

The quality tourist is, often, a high-yield tourist. There is more. They are also one that values opportunities to interact, learn from, and support the local economy in the destination. Therefore, they may be travellers not typically considered high yield because they may be backpackers or student travellers or adventure tourists seeking rich cultural experiences. These preferred visitors travel to an area because of what it offers, not because of a simple desire to get away, go sightseeing, or try some activity that can be done in many other places. The quality visitor seeks uniqueness and authenticity and values the absence of mass tourism; they search for adventure, culture, or nature, but not indiscriminately. Indeed, they will sometimes be willing to pay much more than average for these opportunities. Quality tourists are also more amenable to being managed because they appreciate your efforts to preserve the area's culture and environment. They fit in and are sensitive to local needs and wellbeing. They are much more likely to travel at off-peak times, to avoid crowding. These are the visitors you want to host. There are many terms for the kinds of travellers and travel that seek community experiences – from “green” to “eco” to “conscious” – people who want to ensure their travel is having a positive impact, avoiding the negative impacts that tourism has generated in so many places.

A practical strategy may focus on regional and local populations and readily identifiable

groups that can be attracted to your community, not only foreign markets. Specialist tour operators in your area can tell you how practical it might be to attract long-distance travellers to specific experiences.

To be useful, target market segments must meet certain criteria:

- They can be identified and measured (e.g., by location or social and demographic characteristics, by club membership or activity patterns).
- There are enough of them to justify the effort.
- The segment is stable and will endure in the long-term.
- It is feasible to communicate with and sell to them.
- They can be attracted to your location, events, or facilities.

Attracting them will help meet sustainable tourism goals. As a rule, target marketing will include the following key elements:

- Identification of primary and secondary market areas (e.g., primary markets are usually nearby population concentrations from which most demand originates; secondary market areas show potential).
- Separation of domestic from foreign travel segments.
- Separation of business from pleasure travel. Although this is merging much more as a result of remote working trends amplified by the COVID-19 pandemic.
- Attention to the VFR (visiting friends and relatives) market.
- Definition of existing special-interest segments (e.g., sport, festival, or ecotourists).
- Examination of what segments are attracted to other communities and destinations, especially if they are competitors).
- Identification of the socio-demographic group(s) most appropriate for the experience offering (e.g., upper-middle income families or retired couples).
- Determination of whether or not age and gender will affect demand.
- Evaluation of lifestyle benefits that can be offered to certain groups (reached through specific magazines or other media).
- Determination of which segments can be attracted in the off-peak seasons.
- Determination of who can be attracted to stay longer (e.g., for weekend event packages) and who can be attracted for repeat visits.

To be practical, a few key segments will likely constitute the core of the marketing strategy. It is generally beyond the means of a small community or business to undertake sophisticated marketing research and it is generally not efficient to promote to numerous segments. The identification of the community's core experiences combined with adoption of sustainable tourism goals, will naturally restrict the process to a focus on a few prime segments.

6.4 Packaging, Price, Distribution

Once the experience has been determined, working with travel and hospitality partners

will allow a community or business to effectively create a product of the experience that outlines the packaging, the price and the distribution for the promotions. This is a complex exercise, and it is suggested that communities and businesses lean into the expertise of partners, such as G Adventures.

Packaging

Given the need to monitor and control the tourism activities and numbers in the community, packages can be developed and promoted for tailored experiences in a community. This not only provides value to a visitor but allows the community control over the frequency of visitation to mitigate negative impacts, emphasize sustainability, and program educational and interpretive elements that highlight the uniqueness of the community, etc.

Price

An effective pricing strategy requires acute attention to the economic impacts of tourism activities for the community, with special attention also to account for environmental impacts. The determination of price also considers whether an experience is being priced in such a way as to foster sustainable tourism. Price must be considered not only in relation to a tourism experience in the community but to the increase in the cost of public services leading to higher commercial and residential taxes.

[*Part 2: Set-up and Management of Community Tourism Enterprises & Experiences*](#) has an overview of the extensive pricing section, for all types of community tourism expenses, which can be found on Planeterra's Learning Hub.

Distribution

When developing the experience, distribution is very important as capacity is a vital consideration, along with:

- Who is going to help sell experiences?
 - Use only agents and wholesalers who are committed to the values and goals of the community.
 - Work with companies that educate their customers and provide suitable interpretation within a sustainable tourism strategy.
- What safeguards are in place to monitor price, frequency, etc.?
 - Insist on sustainable practices (e.g., recycle, reuse, reduce water)

Supporting material and services are generally required as part of preparing for promotion of the experience.

6.5 Marketing Planning and Tactics

Throughout this section, a data-driven approach has been laid out to provide strategic opportunities to effectively develop and tell a community's unique and authentic story. Now that the data has been collected, the target visitor segment has been determined

and the experience has been developed, it is now time to tell the community's story.

An overview of the components for a Marketing Plan can be seen in Appendix B.

Storytelling

There is a reason why stories are used in cultures around the world to share information, teach lessons, etc. In this regard, the community's story needs to be developed and documented in order to inspire an emotional connection to the community – the place and the people.

The different means of communicating a story to target visitor segments include paid and earned (free) promotional opportunities. For the purposes of this section, they have been divided into two categories – digital and traditional - to provide an overview of what could make up a marketing strategy. All options need to be chosen based on the target visitor segments and how they consume information and seek inspiration.

By looking at sharing a story with a target visitor audience there is already an understanding of the importance of two-way communication. When a destination or business tells a story, sometimes people will have questions and when using owned communication channels (website, social media channels, etc.) the community has an opportunity to directly connect with the potential visitors, creating more meaningful interactions to help influence action.

Digital

There is no question that digital platforms have taken over the way that people engage with information, communicate, and research. Digital platforms provide communities and businesses with cost-effective tools for telling their story.

Digital platforms can be divided into several different categories and are each used to share tailored messages and connect with specific target visitor segments.

Website

A community's website would be considered an owned communication channel that allows effective and clear messaging that highlights the vision, mission, experience specifics, and educates visitors on appropriate behaviours when visiting the community. But a website is only part of a larger digital strategy.

Social Media

Marketing with social media has made significant advancements that allow a community to inspire visitors to travel to their destination. Through the use of images, tailored messages, user-generated and educational content, social media is a platform where travellers go to start the dreaming and planning process of their purchasing journey.

For training modules on setting up and using social media accounts such as Facebook and Instagram as well as business listing sites such as TripAdvisor and Google, see

Planeterra's Learning Hub.

Traditional

To complement the story that has been shared through the website and on social media, additional communication channels are available for the community.

Media Relations

Newspapers, magazines, and online publications are all highly visible channels to share the key aspects of the community and the experience. There are many promotional benefits of media coverage – especially when an article is in the right publication, at the right time – as many visitors trust messaging by a third party. This is one of the significant differences between advertising and media relations.

Advertising

Advertising is a paid, tailored, controlled message that is shared in a number of different places. This is a costly activity and does not always deliver results as there is rarely an opportunity to connect with individuals who may have seen your advertisement. Paid advertising can also be done through social media and provides an opportunity for the community to facilitate the advertising process themselves through the platform.

There are many webinars, workshops and online learning opportunities to delve deep into the world of Digital Marketing. Start with the Planeterra Learning Hub and determine how much more you would like to know. Understanding how to make effective social media posts, boost (pay to increase visibility) posts, and pay for Google Ads, are basics that are important for any entrepreneur to understand.

Sales Promotions

Activities designed to attract attention and result in sales. Examples:

- An event partners with a shop(s) to offer visitors price reductions for event tickets.
- Develop partnerships to increase the volume or reach of promotions.

From a sustainability point of view, a number of factors must be considered:

- Communications must be targeted, and fully informative, otherwise false expectations are generated.
- Quality tourists are informed tourists.
- Quality experiences are marketed differently from mass tourism experiences (i.e., stressing exclusivity or uniqueness; value is more important than price).

6.6 Partnerships

While the discussion for partnerships comes near the end of this section, partnerships are a cross-cutting theme that need to be considered at every stage of the planning and implementation of a tourism experience. Partners are central to creating opportunities

for access to resources – expertise, financial support, etc. – for small communities. Tourism planning is not an activity for a community or business to go it alone especially given the opportunities for economic benefits as well as the deterioration of intangible and tangible assets.

Partnerships are needed to launch effective advertising and image-making campaigns, to develop packages, and to conduct research. Public-private partnerships are required for the planning and evaluation process, and while business to business partnerships are more common for marketing, community representatives, or a public marketing agency should be part of the campaign.

Planeterra's community tourism development has always had its roots in partnerships. Since the beginning, its partnership with the private sector, via G Adventures, was the guiding force behind its community tourism experience and enterprise development work and continues through new travel company partnerships today. Planeterra's leadership always believed that any community tourism initiative could only be successful when designed in partnership with the market, not just based on research, but based on actual future contracts. This kind of partnership means that the style of experience, the number of rooms for an accommodation project, the number of seats for a dining room, or the number of guides needing to be trained for tours, are based on real projected numbers based on the client's projected volume. Coupled with projections of growth and independent and local market demand, the full design of the project can be completed. Often the community enterprise will launch with one partner, and continue to grow year after year, serving new tour companies and independent travellers, evolving and adapting to new customers and target markets. For many communities, having the first partner in G Adventures helped to establish the community enterprise's processes, provide real time training, gain customer feedback, and allow the community to grow gradually and responsibly.

Case Example: Al Numeira Environmental Association (NEA) in South Ghour area of Jordan served food located on a highway where tourists constantly drove by, but they had not been able to attract customers other than the local residents who used the space for meals and events. Planeterra facilitated a partnership between NEA and G Adventures, which resulted in increased revenue for NEA, but also improved the quality of G Adventures' tours due to the prime location and great local food. Planeterra worked with NEA to customize the experience and ensure health and safety standards were met. Today NEA has a sign out on the highway so more domestic and international travellers know to stop by for a delicious meal.

Learn more about Al Numeria Environmental Cafe [here](#).

Local, regional, and national partnerships should also be pursued. Small and remote

destinations must rely on regional or national-level marketing to set the stage for more targeted campaigns. Furthermore, it will be necessary to ensure that higher-level marketing does not pursue goals that are incompatible with sustainable development principles and community goals.

Collaboration among all the destination stakeholders, both public and private, is essential to create a vision for sustainable tourism and an appropriate marketing strategy. Individual promotions will be expected to align with the national or regional strategy, and messages that do not, may face pressure or other consequences; therefore, it is important to understand the marketing strategy of the broader destination to which the community belongs. Likewise regional or national strategies should reflect community goals and interests.

Potential Partners for New Community Enterprises - Excerpt from the Planeterra Learning Hub

There are different types of travel companies that may be interested in your products and services.

- **Hotels:** Nearby hotels who can sell or recommend to their customers.
- **Tour companies:** Local tour companies selling day trips to people who live in cities nearby
- **International “Outbound” Tour Operators:** Companies that sell tour packages to international tourists. “Outbound” means they sell to people in their countries, to visit other countries
- **Ground Operator or Inbound Operator or Incoming Tour Operator:** Tour companies that sell packages to international tour operators - they operate the tours “on the ground” for the international tour operators. “Inbound” means they market to foreigners coming into the country. Inbound operators sometimes also sell direct to customers outside the country or once those tourists are already in the country, by partnering with hotels or advertising their products on streets that tourists pass by, and online.
- **Travel Agency:** Companies that sell experiences directly to customers, selling multiple companies’ products - tour packages, hotel stays, flights, etc. Sometimes the word *travel agency* is interchanged with *tour operator*.
- **Online Travel Agency (OTA):** Companies that sell travel products online like [Expedia](#), [TourRadar](#), [Booking.com](#), [Responsible Travel](#), [Airbnb](#), TripAdvisor (through [Viator](#)). There are also online travel agencies that specifically sell social enterprise experiences, like [Lokal Travel](#), [Visit.org](#) and [Airbnb Social Impact Experiences](#).

Beyond typical tourism markets, your organization may be able to also market to organizations. Alternatives may include:

- Schools and universities are a potential partner if your experience offers an educational component about culture, traditions or even environmental preservation.
- Local businesses where you could offer volunteering opportunities for corporate donations or make products for their events. Many businesses have Corporate Responsibility Programs which cater to supporting local organizations.

6.7 Marketing Assessment and Monitoring

Tourism marketing planning is an ongoing activity that requires feedback and assessment. To start this process, the largest stakeholder needs to be consulted to evaluate the positive and negative impacts of the tourism activity.

Every marketing planning process requires ongoing monitoring of results and constant attention devoted to making improvements. Monitoring usually requires specific research efforts and establishment of indicators. The types of research necessary are indicated below, with comments as to sustainability requirements.

- Tracking studies: to determine the effectiveness and efficiency of marketing, the awareness levels, attitudes, travel patterns, and satisfaction levels of visitors and target segments must be tracked over time,
- Impact assessment: measuring concrete and qualitative results from marketing efforts, and tourism in general, including economic, social, cultural, and environmental effects,
- Costs and benefits: an evaluation of the overall benefits obtained from tourism versus the tangible and intangible costs or negatives; also consider opportunity costs (things foregone to develop tourism) and externalities (general costs not borne by the organization).

The ultimate evaluation consists of decisions regarding tourism goals and strategies in general, including the issues of setting limits, changing target market segments, and modifying the marketing strategy. These issues impact on the entire community development strategy and all its management systems.

Review

While a sustainable tourism marketing process involves the same elements used by most businesses and destination marketing, there are key differences that need to be carefully considered:

- Readiness, resources, and structure within the community
- Community needs and goals come before the targeted audience
- Tourism capacity
- Intangible and tangible cultural and natural heritage protection
- Matching locally supported experiences to appropriate segments (i.e., Niche

marketing).

- High yield and high-quality visitors, not large numbers.
- Cultivating the right image to convey environmentally and culturally sensitive messages, employing unique selling propositions.
- Communicating effectively with and educating all visitors.
- Employing environmental and cultural interpretation.
- Managing the visitor and encouraging the adoption of codes of conduct.
- Achieving efficiency by avoiding high peaks of demand and overuse.
- High quality attractions and services.
- Research into appropriate segments, communication effectiveness and resultant impacts.
- Building repeat visitation/ trade (i.e., Brand loyalty).

Traditionally, marketing was not a vital part of the tourism planning process, however, when taking a data-driven approach to developing all aspects of a community, marketing activities provide the situational awareness and insights needed for a successful community tourism initiative.

SECTION 7

RISK MANAGEMENT AND EMERGENCY PLANNING

7.1 Planning for Resiliency and Risk Management

All businesses face risks - the chance that something could go wrong and affect the success of the enterprise. They include things that are within your control (internal) to those that extend beyond your control (external). In tourism, risks to your businesses include all those things that affect whether or not a visitor is able, and feels safe, to visit, as well as all those things that affect the enterprise's ability to operate, long term.

The kinds of risks that can affect a community tourism enterprise are summarised in the following table:⁵

Civil/Political	Technological	Biological	Natural
Terrorism, civil unrest, conflicts, war	Fires (onsite) causing damage to records	Diseases / Epidemics / Pandemics / Medical	Floods, wildfires
Dishonesty / fraud / theft in business or organization	Security breaches	Oil/Gas/Energy crises	Earthquakes, volcanic eruptions
Community conflicts	Cyber threats	Contamination and pollution	Climate Change related drought, changing weather patterns
Crime	Failure of infrastructure	Lack of waste management	Major storms (hurricanes, typhoons)

⁵ Tourism Risk Management An Authoritative Guide to Managing Crises in Tourism December 2006 APEC International Centre for Sustainable Tourism (AICST)

In 2021 the world saw a potential risk reveal itself in the most damaging way we have seen in history. There have been pandemics and localized spread of disease that have affected tourism before, such as Ebola causing tourists to cancel travels to the whole continent of Africa when only small areas in certain countries had cases. The SARS pandemic, a case of another coronavirus in 2003 affected several countries in Asia and North America. In 2015 we saw the Zika virus cause cancellations of travel to tropical nations throughout Central America and the Caribbean. But never before have we seen travel disrupted to this extent. The question is, could we, all travel businesses, have prepared for this? Well the risk management process is all about preparation and mitigation - reducing the negative impacts that a potential risk could cause. This is what this section of the manual is all about.

While the COVID-19 pandemic brought emergency planning and adaptation to the fore, many businesses and destinations around the world have also been trying to plan for the effects of Climate Change and looking at long term potential risks based on changing weather patterns causing flooding, drought, wildfires, eroding beaches, coral bleaching, species endangerment, destruction of crops, and the list goes on. These risks are daunting and seem to be out of one's control. What community tourism businesses can do, is identify potential risks, and plan for such emergencies, in order to adapt and minimize the potential damage to the business and the community's livelihoods. The challenge is to ensure that a second disaster does not occur after the initial disaster. For example, the lack of planning and emergency measures may result in business closures and unemployment -- the second disaster.

Other less daunting, but more likely risks, may include issues such as conflicts in organizational management, staffing, inter-community relations, and local politics. These factors can also create problems in the business and may not affect visitors arriving but could have an impact on the business to be able to manage, service customers, and continue to operate and reach its goals.

The next section will provide a process a community enterprise can follow to identify, analyze, treat and monitor risks to help you better manage your business, improve decision-making, identify opportunities, and avoid or minimize losses.

7.2 Risk Management Process

The Risk Management Process is a logical, step by step approach to plan for any of the risks involved in an activity or process, like a business. It is a methodology that helps managers make the best use of their available resources and it is an essential part of business planning. Any risk management plan for tourism should consider risks potentially impacting the safety and well-being of visitors and employees and broader community members. There are seven steps to the Risk Management Process as can be seen in Figure 7.1.

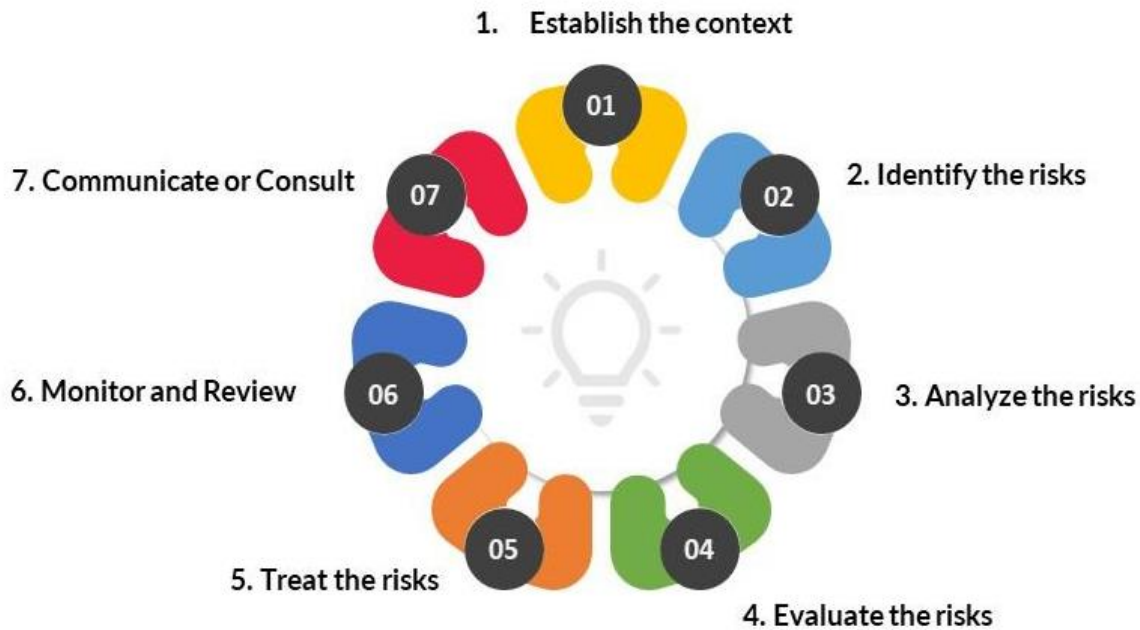


Figure 7.1: Risk Management Process Steps

Step 1: Establish the Context

Outline the nature of your business, the types of risk a business like yours, in this case a community tourism business (urban, rural, non-profit-owned, community-owned, etc.), and how risks could affect your goals and priorities.

Step 2: Identify the risks

Define the types of risk to the goals and objectives of the organization. Identify the stakeholders involved, in other words, who will be affected? Risks may include all natural and political disasters that could affect tourism in your country, your community, or the countries in which your visitors live. They may also include things like, ability to find skilled employees, ability to find financial resources to invest in the business, conflicts arising in the community that threaten the ability to operate the business in the long term (for example, some community members do not want tourism).

Step 3: Analyze the risks

Next think about the likelihood, or probability that the risks may happen. Some risks may have a very low likelihood of happening but would cause major damage to the business (Like the COVID-19 Pandemic). Some risks may have a higher likelihood of happening (at a higher frequency), like annual floods, but they have less risk to the business because the local government always manages to clear landslides quickly and the floods only affect visitation for 1-2 weeks at a time. The likelihood that a major flood could happen is lower, but the negative impact would be higher. Therefore, for each risk, you must analyze both the probability and the impact, cost or consequences of such an event occurring. You can do this in a table; see an example of a Risk Management worksheet from Planeterra. [Planeterra Example here](#)

Step 4: Evaluate the Risks

Next rank the risks according to priorities, by risk category, and rated by likelihood and possible cost or consequence. This evaluation will show you the levels of risk associated with your specific situation. Your risks can be evaluated as illustrated in Figure 7.2.

	Extreme	Very high	Moderate	Low	Rare
Almost certain	Severe	Severe	High	Major	Moderate
Likely	Severe	High	Major	Significant	Moderate
Moderate	High	Major	Significant	Moderate	Low
Unlikely	Major	Significant	Moderate	Low	Very low
Rare	Significant	Moderate	Low	Very low	Very low

Figure 7.2: Risk Evaluation Levels

Step 5: Treat the Risks - Risk Mitigation

Develop and implement a plan with specific actions or measures to address the identified risks. Consider:

- Priorities (strategic and operational)
- Resources (human, financial, technical)
- Risk acceptance (i.e., low risks less likely to cause damage therefore less need to manage or mitigate/treat) Low and very low risks can normally be accepted, with ongoing monitoring to ensure risk levels are not changing and something may be becoming a higher risk.

Document your risk management plan and describe the actions to be taken, the reasons for selecting certain risks as priorities, and the responsibilities (who is the responsible person for each action?). Your risk management plan should also include your process for ongoing monitoring, and any assumptions made about the probability of risks occurring or not occurring. The following table provides some examples and some actions to think about.

Natural disasters	Do you have an emergency evacuation plan? How will you protect your employees or community members in the event of a fire, flood, or earthquake?
Fire or theft of information	How will you protect your equipment, your information? How are your records stored (for example, if you record transactions in a paper notebook or on one computer, what would happen if there was a fire or if someone stole it)? Take measures to protect your records and store backups offsite (like secure Cloud-based systems). It is particularly important now to think of protecting your records, reservations etc. Backing up your systems to other places is important. It may even be prudent to have a backup in another city to ensure that you are able to continue doing business should your records become damaged.

Pandemic, conflict, other issues resulting in lack of international travel	How will you adapt your business to the local market? How can you diversify your income and sell products or other services to new markets that are available when your regular market is disrupted?
Community conflicts	What steps can you take to ensure community members are informed and satisfied with how your tourism enterprise is impacting the community?
Lack of emergency response skills	Training staff on emergency plans and tasks to be undertaken during an emergency can greatly improve your chances of managing a disastrous situation effectively and safely.

Step 6: Monitor and Review

Risk Management plans, policies, and decisions should be reviewed regularly (each year) to identify any new risks, changes in probability or level of risk, and any new actions that may need to be taken.

Step 7: Communication and Consultation

Ensure your organization's leadership, employees, or community members understand the risks of your tourism enterprise, and your plan to manage potential impacts from risks occurring. Seek advice from experts, as needed, for your process to identify and mitigate risks.

Your risk management plan should include a section on communications in the case of a disaster. Communications should be transparent and honest and direct. How are you communicating to your broader community and to your customers about how you are managing the situation? For example, with the COVID-19 pandemic, a response to new local customers, and potential future customers, must be available on your website in the form of a "COVID Safety Plan" outlining the steps you are taking to keep people safe.

7.3 Saving for the Future

We must be prepared for the unexpected. Unexpected costs or unexpected barriers to your income sources can happen at any time and with no notice at all. In Risk Management, a business may identify loss to income as a risk to the community's livelihood. Saving for the future is an action you can take to mitigate the risk and ensure your community, or your enterprise, can survive periods of loss. Depending on how your organization is structured, there are many different saving schemes that you could use. In this section, we will bring you through some examples from our partners across the world and other trusted models to protect your organization.

Even when it feels impossible to save, taking any portion of your income for a later date is always worthwhile. Tourism is very volatile, and you never know what surprises life will bring. It is best to be prepared. Learn about different savings schemes that may be available in your country through different non-profits as well.

Examples of Planeterra Community Organizations' Saving Schemes

- Panauti Community Homestay in Nepal saves 20% of all tourism income in their Community Development Fund. The hosts together have decided that education for children in need is one of the top priorities for this funding to be used.
- Parwa Community Restaurant reinvests 25% in the business and saves 75% in their community development fund which includes emergency fund. During the last 5 years they have invested in several projects like: nutrition and food security through capacity building programs, education program through scholarships, house condition improvements (solar thermal tanks for hot water at home and water containers), environmental programs through reforestation programs, etc.
- Puesta del Sol is a community homestay program and saves 15% to use as an emergency/community development fund.
- Jukil community lodge in Bolivia saves 20% of all their tourism income for their community development fund, they have decided to support education in their community helping students with uniforms and school supplies.
- Sthree is a social enterprise handicraft shop that provides jobs for vulnerable women and differently abled youth and supports a network of one hundred women artisans. With the profits from their tourism program, they donate 5% for operating costs of their women's shelter through their non-profit partner. All other income is saved for emergencies.

SECTION 8

MONITORING & EVALUATION

This section provides guidelines on the challenging task of assessing how well a destination and its products are doing. Developing key indicators, setting carrying capacity thresholds and setting up an ongoing impact monitoring system are discussed.

Once your community has launched into its tourism initiative, it becomes imperative to be able to measure how well it is working. It may not be possible to measure all the impacts of the plan's implementation, so you have to develop indicators that provide you with a good understanding of how well your community is doing from tourism. Monitoring these indicators is necessary to ensure that the goals you set out in your strategic tourism plan are being met and not forgotten, and that tourism is being managed to ensure long-term sustainability, preservation of the natural and cultural heritage of the place, and positive impacts experienced by the community.

An effective monitoring program will require an organizational structure and process for ensuring that impacts are monitored and evaluated in order to make decisions on how to act, to improve or change the outcomes. How is progress to be measured? Considering the many complex issues and concerns, what indicators should the community use to ensure that it is able to keep on top of the developments and changes that affect its vision and well-being? Some impacts can take a long time to emerge, and by the time severe degradation becomes visible it may be too late to save the resource. Similarly, it is important to gauge the positive impacts of tourism so that you can maintain or further improve on successful outcomes.

8.1 Keeping the Tourism Plan and Activities Dynamic and Effective

Accomplishing the goals and objectives set by strategic planning is a challenge that many are not able to meet. Key requirements for success are to monitor, evaluate, and adapt as required, all of which should be done on a regular basis. Scanning the external and internal environment of the community should be an ongoing activity. While this has not commonly been done by destinations, it is being increasingly recognized as a critical step to help make both the tourism plan and activities dynamic and effective.

What to Monitor?

What should be monitored in the tourism plan is determined primarily by the community's tourism vision, goals, objectives, and action plans, as well as by the principles of sustainable tourism development. Monitoring of the ecological, economic,

social, cultural and political impacts plus business success and visitor satisfaction, as related to the tourism initiative, is critical. (See worksheet 8.1)

Carrying Capacity

The level or threshold of use or impact that a resource (within a community this includes natural and cultural resources) can manage without seriously affecting the health or survivability of that resource can be seen as its carry capacity. Note that these limits or thresholds of acceptable use are influenced by a number of variables, including time. Indicators for carrying capacities can be established for environmental, social, cultural, and visitor aspects. For example, the visitor carrying capacity of a beach may vary depending on the number, type of users and activities conducted. Actions can be implemented to try and improve the carrying capacity of a resource while some resources may have a very low tolerance for use.

When Planeterra began working with the Wiwa community of Gotsetzhy in the Sierra Nevada mountains of Colombia, one of the first actions was to determine the limitations to visitors, or the acceptable level of visitation to the remote Indigenous village. The community leadership including the chief or *Mamo* and families decided that there should be no more than fifty visitors per day to the village. The area of visitation was also planned to be three hundred metres outside of the village and across the river, so that tourism activities were to take place away from family homes, so as not to disrupt daily life to an extent that it would impact the privacy and traditions of the community.

Learn more about Gotsetzhy Community Tourism [here](#).

In another rural Indigenous village in Guatemala, the Posadas Mayas home stay program run by the San Juan La Laguna tourism association set the number of nights that the families would accept guests in their homes at four out of seven. When planning takes into consideration all the impacts and the benefits (extra income) are weighed against the costs (hosting visitors daily in the family home, lack of privacy), the limits of acceptable use can more strategically be established and therefore result in long-term sustainability of the tourism initiative.

Learn more about Posadas Mayas [here](#).

Indicators

Indicators are a useful tool in a monitoring program. Good indicators provide decision-makers with information that enables them to evaluate and make timely decisions on changes caused by tourism to key aspects of the environment, resources, culture and economy of the community. Indicators have to be selected so that they are inclusive, credible, efficient (in time and cost for obtaining the data), and useful to decision makers including tourism business managers and community leaders. It may be best to select a key number of indicators that provide the most relevant information, since a large

number of impacts and indicators could potentially be measured. Indicators will require specific measures, for example, species loss as a measure of ecological health) or number of women participating in leadership roles in the community. How well the community is managing its threshold of impacts, or carrying capacity, would include a number of indicators around changes to the environment, health, food security, gender equality, cultural preservation, etc. Planeterra developed a method of evaluating impacts of community tourism useful for both small, rural communities as well as non-profit organizations or social enterprises managing tourism initiatives supporting marginalized communities. A review of major global indicators of wellbeing was undertaken to ensure it was inclusive of the breadth of themes (for example, the Sustainable Development Goals) while kept succinct and efficient for a community or small organization to collect and review.

8.2 Monitoring Strategies and Actions

Once it is agreed that monitoring is needed, monitoring strategies need to be developed and implemented. The following identifies possible strategies and actions. (See worksheet 8.2)

Monitoring Strategies and Actions
Assign organizational responsibility for formulating impact thresholds and indicators, and for monitoring same.
Develop carrying capacity thresholds and other indicators and measures. Two distinct sets of indicators are required: performance indicators to measure the results of strategic planning and implementation and business success, and indicators for measuring impacts on the resources including natural, cultural, resources used in tourism. These two sets of indicators combined should provide a comprehensive picture of the destination's efforts toward sustainable tourism (for its tourism industry, visitors, natural environment and community).
Develop baseline information on the indicators developed, as a benchmark against which future results can be measured. Hence, setting up an organizational structure for setting and monitoring indicators should start early in the planning process. A baseline survey should be conducted in the first year, during either the planning stage or first year of operation to understand the status at the outset and be able to measure change over time.
Use existing standards along with the indicators related to the activity or resource being monitored. Also ensure that new standards are established based on evaluation of monitoring data.
Implement visitor, site, and other management actions to ensure proactive management of the impacts on the community and environmental resources. These actions should be related to specific objectives set in these areas and to the overall vision of sustainable community tourism.

8.3 How to Monitor, Evaluate, and Respond

How to monitor, evaluate, and respond involves a number of activities:

- Set up an impact threshold and monitoring body (this could be the leadership committee or a subcommittee within the community or organization tasked with setting the indicators to be measured).
- Set up control systems and mitigation measures (Plan the actions you can take to ensure the potential negative impacts are avoided).
- Conduct integrated evaluation - recognize interdependence of resources and actions (Plan your method of monitoring - data collection via survey, interviews, or both, and how you will evaluate the data). *Online tools are readily available to conduct impact measurement in a quick and efficient fashion to help a small organization collect and review data. For example, Survey Monkey provides free limited services that could be sufficient for a community tourism organization. It allows for simple analyses to get an overview of the responses and find any areas of concern, as well as positive outcomes.*
- Implement management response, with help of previously identified mitigation measures. Data is only useful if used, therefore part of the monitoring planning is to determine how you will use the responses, and what you will do about problem areas identified in the results.

8.3.1 Setting up an impact thresholds and monitoring body

Constant monitoring and adapting of the strategic plan and tourism activities is crucial to ensure that community goals are met. This is facilitated by establishing an ongoing impact monitoring body to monitor the tourism related impacts on the community (both positive and negative). The key functions of this body would be to assist the strategic planning effort in:

- Setting thresholds for acceptable use of various key resources.
- Developing and using indicators to monitor the impacts of tourism.
- Suggesting alternatives to mitigate impacts and manage carrying capacity concerns.

An organizational structure for developing and implementing the monitoring strategy is essential to the success of the planning process and tourism initiative. The organizational structure should be set up so that it works effectively through changing leadership. While gathering the monitoring data is a technical process, the evaluation of the data becomes a political process, leading to decisions and choices for balancing and managing the impacts. In light of this information, a couple of options are available for setting up the Impact Monitoring committee:

- Appoint a sub-committee of the CTO and include experts and other community members as required. The evaluation of the results can be done by the sub-committee, with the help of experts as required, and recommendations and results communicated back to the overall CTO group for further evaluation and action.

- Establish a separate Impact Monitoring committee - if this option is followed, ensure that the CTO is closely linked to this committee to enable continuity with the tourism strategic planning and management understanding of the monitoring process and data.

Also consider the following:

- Selection of Impact Monitoring committee participants - how much council/leadership involvement to include? How much direct community involvement in the structure and process?
- Involvement of experts - who? when? how?
- Funding for the committee and for the monitoring activities - consider sources such as local government; obtain portion of accommodation, hotel or other tourism taxes or expenditures; raise funds through local/regional campaigns, etc.
- Duties and remuneration of committee - volunteer or paid? Permanent or temporary members? Length of term of duty?

8.3.2 Control systems for monitoring change

Ensuring that the community's goals and objectives are being met requires setting up control or management systems to measure progress, followed by careful evaluation and adaptation as needed. It is helpful to develop alternative scenarios for mitigating damage or proactively managing capacity levels, while setting up thresholds and impact indicators. Control systems include:

Setting carrying capacity thresholds. Though it is difficult to establish limits or thresholds for the acceptable use of vital resources (including natural and cultural), they must be established, recognizing that these are only approximations and that strict capacity limits do not exist in reality. These limits imply that use beyond these levels (based on existing management and use parameters), could adversely affect the long-term survival of that resource. The carrying capacity limits of some resources may be observed to be fairly rigid, while others may fluctuate over time - actions could be taken to manage or even increase the carrying capacity of these resources. For example, ensuring that visitors stay on specific designated trails, or temporary closure of trails where high impact on fragile vegetation is measured, might be some actions for mitigating damage. An increase in the environmental carrying capacity of that area over time may be one possible outcome of improved visitor management practices.

Develop macro and micro level indicators (community and global). Use indicators (and their measures) to monitor how well the community's tourism vision, goals, and objectives are being achieved, in the context of sustainable tourism. The following table identifies different types of indicators.

Key indicators	Measure tourism's impacts on critical community related resources, environments, and activities (i.e., indicators that measure the overall achievement of sustainable tourism).
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Performance-based indicators	Enables evaluation of other results (e.g., set indicators that measure whether the specific objectives of the plan have been achieved and business is earning an income and able to cover costs). Performance criteria for community satisfaction that with tourism will include measuring economic, social, and other benefits of tourism together, rather than just using economic indicators.
Composite indices	Provide cumulative information on key factors affecting a community over time (e.g., a number of indicators that address gender equality and women's empowerment that together give a good indication of the status of women in the community).

You may not be able to develop a comprehensive list of indicators and measures to monitor all the necessary activities and resources due to time and funding constraints. The challenge then is identifying the areas of key impacts and concerns (potential and existing) which should be monitored first. Action steps include:

- Make a list prioritizing the impacts and concerns to be monitored.
- Developing effective indicators that provide valid, reliable, and reproducible data, are linked to a time horizon, and are efficient in the time and cost required to gather the data. Ensure that indicators of cumulative impacts are also developed, for example, indicators for measuring the cumulative stress of tourism on the natural environment (or on the community).
- Indicators for lower priority areas can be developed and monitored later, as experience and funds become available.
- Retain experts to assist with those aspects of indicator setting, data gathering, and evaluation of results that requires technical expertise. You may be able to obtain some help from government agencies in your area or region.
- Developing micro-level indicators such as impact on individuals and community members, employees, etc.

Organizations involved in activities related to tourism should set their own performance criteria and indicators for measuring the achievement of their goals and objectives, and the impact of their activities both externally to and internally within their organization. Organizations will also have performance criteria related to the organizations purpose (e.g., job creation or profitability). However, an organization which chooses to be guided by sustainable tourism principles will have a number of other performance criteria based on these principles, for example, social responsibility toward the well-being of the community it is situated within. This would entail using indicators to measure contributions to the community, community satisfaction with the organization, etc.

Setting and monitoring of impact thresholds should be a parallel activity alongside the development of goals, strategies and action plans. Some macro-level indicators for monitoring environmental aspects such as ecological integrity can be given as soon as it becomes clear that tourism activity will impact the natural environment. Early monitoring

is important in order to ensure that baseline data is available for comparing future results from the monitoring activities. Your community or region may have some existing monitoring data on various indicators that should be obtained and included as background information.

Use indicators together with the standards that govern tourism-related resources in your area and region (e.g., standards for water quality or waste management)). New standards or modifications to existing standards may be required, based on the evaluation of the results from the monitoring activities.

Critical to the effective use of indicators is the development of a reporting mechanism, where those who are responsible for the implementation of the action programs and use of tourism related resources, report the results of their monitoring program to the community and other key stakeholders in the community's tourism domain.

Longitudinal data (gathered over an extended time frame) is essential for evaluating certain impacts. The lack of noticeable impacts in one year in an area does not necessarily mean that there is no change to the resource; some impacts take a longer time to become evident. Set up a central database system to incorporate baseline data and ongoing monitoring results. The community-level database system would contain macro-level data (community and environmental), as well as micro-level data were available from individual organizations.

Example of a Broad Range of Indicators for a Tourism Destination

Indicator (Note: additional measures are mentioned in brackets)	
Economic and Tourism Industry	<ul style="list-style-type: none"> • Accommodation taxes • Residential vs. commercial tax base • Jobs - number and type, income distribution, gender composition (other diversity and inclusivity measures) • Tourism expenditures by visitors • Number of visitors (annual, peak, domestic [local, regional], vs. international) • Average length of stay • Number of visitors to various sites, businesses, attractions, events, facilities, etc. • Availability of local tourism training (services) and education • Number and type of development permits issued at local/regional level • Number and type of business licenses issued at local/regional level • Migrant labor force (versus local unemployment) • Tourism economic costs (infrastructure, etc.) [do cost benefit analysis]
Social	<ul style="list-style-type: none"> • Number of facilities for local use (total) [compared to population]

	<p>and tourism growth]</p> <ul style="list-style-type: none"> • Number of facilities developed for joint visitor-resident use • Contribution to facilities by public and private sectors • Overcrowding of facilities and services used by locals • Noise + waste pollution • Traffic congestion (peak season; annual) • "Irritation index" (resident sentiment) to measure health of host-guest/local-visitor relationships • Level of social services (compared to resident population growth rate) • Destination growth rate (residential population, second homes, new homes, etc.) • Number of visitors (annual/peak) • Average length of stay of visitors • Changes in land ownership (non-resident/resident, etc.) • Change in family structure
Cultural	<ul style="list-style-type: none"> • Ratio of visitors (domestic, local, regional], international) to locals • Dispersal and density patterns of visitors in local community (annual/ peak) • Increase/decrease in cultural festivals (and authenticity of these) • Change in local values, dress, customs, traditional activities • Appropriateness of design (infrastructure) with local culture • Level of use of local knowledge and skills (e.g., in interpretation) • Youth participation in cultural activities
Ecology/ Natural Areas	<ul style="list-style-type: none"> • Solid waste generation • Water/ soil/ groundwater quality • Habitat fragmentation • Fishing catches / licenses • Species loss and change (e.g., mammal mortality, reproduction rates, etc.) • Air and water pollutants (chemical/oil spills and emissions, etc.) • Carbon Emissions (energy use at business and destination level) • Visitors (numbers, types, patterns of use and dispersal)
(Public, Private, Non- Profit) Enterprises	<ul style="list-style-type: none"> • Number of employees • Type of jobs (part-time, seasonal, full-time, local versus outside labor) • Wages (private sector financial data may be difficult to obtain) • Revenues/profitability/market share • Capital expenditures • Community contributions (facilities, donations, etc.) • Number of visitors and capacity to host • Renovations/upgrades required (for competitiveness, safety, etc.) • Service quality • Customer satisfaction (via surveys, guest satisfaction cards in hotel

	rooms, etc.)
Visitors	<ul style="list-style-type: none"> • Needs, preferences and interests • Satisfaction with facilities and services • Exchange rates • Code of conduct/ethics • Income + other market and demographic data • Visitation patterns (time, return, length of stay, etc.) • Modes of transportation • Perception of destination image • Parking at attractions and services • Traffic congestion
Site specific	<ul style="list-style-type: none"> • Number of visitors per square area (peak/annual) • Number of visitors to site (total peak/annual) • Site protection measures and policies • Tourism revenues • Site degradation - physical • Ratio of tourists to locals • Renovations • Code of ethics
Other	<ul style="list-style-type: none"> • Sewage, water, electricity capacities • Community satisfaction with tourism (attitude surveys, public awareness programs, public participation in tourism, etc.) • Plans related to tourism (local/regional) • Regulations and standards (new, changes in, as related to tourism) • Level of public conflict over development • Conflict and dispute resolution mechanisms • Political stability at the destination (area, regional and national level) • Political sentiment, regulations and policies (on tourism related environments and resources)
Composite Indices	<ul style="list-style-type: none"> • Carrying capacity • Site stress - composite measure of levels of impact on site due to cumulative stresses from tourism and other sectors. • Attractiveness - Qualitative measure of site attributes which make it attractive to tourism (and can change over time) • Cumulative community stress (as measured by demographic changes, tourism trends, migration trends, economic climate, etc.)

Sample Simplified Set of Indicators for Community Tourism Organization Impact Monitoring.

The following table identifies a simplified set of indicators for a community tourism organization to monitor impacts.

Environmental	Increase in waste Ability to manage waste locally New environmental initiatives or projects started
Social	Gender composition of leadership roles Ability to access basic necessities Level of education achieved by children in community Migration into/out of community
Cultural	Traditional customs continued Traditions shared with visitors Youth interest in cultural activities or traditions Changes - positive/negative in culture
Economic	Revenue earned from tourism activity Profit earned from tourism activity Jobs created for community members Wages (minimum or living wages) New enterprises developed

8.3.3 Integrated evaluation

Evaluation of the impact monitoring data should help to assess how well a community's tourism goals and objectives are being accomplished and assess the impacts of tourism related activities on the destination's resources. Such an evaluation needs to be done within the overall economic, environmental, political, social, and cultural context of the community. An issue such as crowding cannot be examined in isolation - you would need to look at transportation, attractions, and other factors that could influence the problem.

Indicators should also be evaluated to see how well the community is adhering to the principles of sustainable tourism development. If, for example, tourism expenditures are high but 93% of workers have poorly paid job positions in tourism, then are the benefits of tourism being equitably distributed? In doing the evaluation, therefore, close attention must be paid to the interdependence among the resources, inhabitants, and activities of the many stakeholders in the community's tourism industry.

Disseminating data on the economic benefits of tourism should not be done in isolation. A full impact analysis of the overall costs and benefits of tourism may demonstrate other societal benefits or costs that could influence future tourism decisions. If, for example, the values of spiritual happiness of a population are being threatened through tourism development, despite higher local incomes from tourism, the destination may have to consider alternative management strategies, such as limiting visitors or using zoning mechanisms to separate the visitor and local populations.

8.3.4 Management response to monitoring and evaluation

As results are evaluated through impact monitoring activities, management response will include developing and implementing actions that best respond to the analysis of data. New standards may need to be set, or existing ones modified. Mitigation actions identified earlier in the objective-setting phase of the planning process need to be examined and implemented or altered. Since some of the decisions being made may adversely impact some stakeholders in the community's tourism domain, conflict resolution mechanisms need to be implemented, both within the impact monitoring committee and at the community public level. The following table provides an example of possible management responses to impacts.

Issues	Pressure	State	Response
Visitor impact: natural site degradation	Overcrowding at natural heritage site	Vegetation destruction Physical infrastructure degradation Habitat loss	Zoning to protect fragile areas Limiting access Expenditures on managing conservation
Visitor impact: culture loss and tension	High demand on visiting local religious and cultural events and ceremonies	Local residents do not attend their own festivals Exhibition of hostility by residents toward visitors for intruding Loss of authenticity of cultural/religious events	Restrict visitor access to a select to a number of events Involve residents in determining how much visitation, which events, and how residents could benefit further Develop code of conduct/ethics for visitor behavior

8.4 Developing and Using Indicators - Some Pointers

- The collectors of indicator data have to be unbiased/neutral and qualified. The reliability of the data collected will depend in part on who collects the data and how the data is collected.
- Prioritize the areas requiring monitoring and select key indicators for the high priority ones. You can develop indicators for the lower priority areas as time and funds become available. The experience you gain in developing priority indicators will help make the later task a little easier.
- Ensure that the data being produced is accurate and useful in decision making. Not all indicators are of equal weight and the use of a weighting system must often be instituted.
- The development and use of indicators can be costly and time consuming - making an early commitment to develop an effective monitoring strategy is

important and provides reassurance to decision makers and participants in the planning process that the plan will not remain static and unable to respond to changes in the community's various environments.

- Effective design and use of indicators requires joint action and involvement of a range of actors, including key stakeholders in the community's tourism domain. The collective experience of a diversity of community participants can be very useful to guide the process. Also, the data being produced must be perceived to be legitimate by the scientific, public, and other actors who could be influenced by the results. Otherwise, decisions based on evaluation of the indicator data may encounter conflict from uninvolved stakeholders.
- The data from one indicator may be useful in a variety of areas. For example, data on the experiences sought by visitors could be useful for designing a new tourism product, evaluating the mix of activities in a community, or for designing activities and attractions in the tourism action planning process.
- You may also be able to find indicators being monitored in areas other than tourism that you may be able to use. For example, the rate of participation of women in the workforce may be an indicator that is already being monitored in the community.

8.5 Measuring Economic Impacts - A Note on Multipliers

Multipliers measure the effect of expenditures introduced into an economy. Tourism multipliers are used to determine changes in output, income, employment, business and government receipts, and balance of payments, due to a change in the level of tourism expenditures in an area. Tourism multipliers attempt to capture the relationship between the direct tourism expenditure in the economy and the secondary effect of the expenditure upon the economy, i.e., how an extra dollar of tourism expenditure gets turned over in subsequent rounds of spending by the recipients of that dollar. Some of the factors which affect the multiplier are the size of the local economy, the propensity of tourists, businesses and residents to buy imported goods or services, as well as the propensity of residents to save rather than spend (where saving reflects money kept out of circulation, i.e., not reinvested).

Multipliers can be calculated for a country, a region or a community. However, the information provided by tourism multipliers has to be evaluated with a great deal of care. Factors such as the size of the destination's economy can affect the multiplier significantly. A smaller economy may have a much smaller multiplier than a larger one since more goods and services might be imported to service tourist needs, resulting in a greater leakage of revenues out of the destination. Hence, comparing local with regional multipliers in a country does not produce useful information.

While they should be used with caution, multipliers can demonstrate useful information on how much of the tourism expenditures really stay within the community, and how much leaks out to foreign owners and foreign control. You will probably need to retain

expertise to calculate multipliers. Your provincial/state economic agencies or universities may be a good resource to draw upon for assistance.

If your community does not have the resources to develop and apply multipliers to your economic analysis, you should at least try and obtain as much information as possible on the spending on local supplies for tourism activities in order to understand the positive economic impact tourism is having beyond the principal business. Additionally, if you can obtain information on areas related to leakage, i.e., imports of goods and services related to tourism, the hiring of foreign managers and workers, etc. this information will enable you to implement policies and actions to encourage the development and use of local labor and goods in your tourism industry.

Review

Monitoring the impacts of the tourism strategic planning effort and the tourism activity in your community is crucial in ensuring that your plan and your actions are dynamic and able to generate effective results. The selection of impact thresholds and indicators is a difficult task, and should be based on your community's tourism vision, goals, and objectives, as well as to ensure sustainable tourism development. The process of assessing the impacts created by tourism in the community may produce conflicting results, where economic results, for example, may be positive, while cultural impact indicators may produce negative results. The assessment process has to recognize the need to consider and balance these conflicts.

Setting an ongoing impact monitoring body/committee to select indicators and monitor impacts is essential. Make sure that the selection of indicators and the gathering of indicator data are done by individuals who are perceived to be legitimate, unbiased, and experienced. Similarly, the data obtained should be disseminated widely among the actors involved in and affected by tourism in the community. After the technical process of gathering the data comes the challenging task of evaluating the results and deciding on how to balance and manage impacts - this comes back to community decision-making to make the choices that ensure sustainable tourism for the community.

APPENDIX A

DEVELOPING THE STRATEGIC TOURISM PLAN

A-1 THE TOURISM PLAN OVERVIEW - A Simplified Planning Process

This overview provides an outline of an action-oriented tourism plan based on a full strategic planning process. This is a simplified plan format that is meant to be a streamlined process that can be adapted by community organizations with limited resources.

The community tourism plan should contain the following components as illustrated in Figure A1.

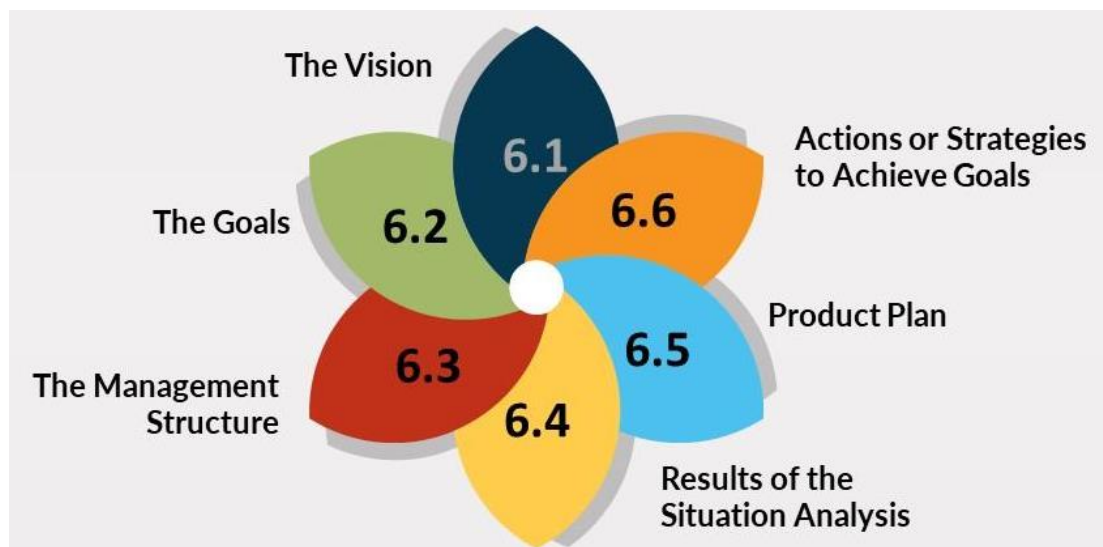


Figure A1: Community Tourism Plan Components

1. **The Vision:** What is the vision the community has agreed upon in the visioning process? This should guide all plans and development activities.
2. **The Goals:** What are the goals, in line with the vision, that the community wishes tourism to help them achieve, from the economic, social, environmental, and cultural perspectives? At this stage you can think about the indicators of success; how your

community will monitor and evaluate the tourism initiative's ability to meet the goals and vision set out.

See Section 8: Monitoring & Evaluation that outlines the methodology for setting up your monitoring and evaluation system.

3. **The Management Structure:** Outline of the community tourism organization structure including roles and responsibilities. Who will lead the development process and who will continue to work on the tourism operations once the new enterprise is launched?

See Section 3: Getting the Community Ready outlines the steps to take to complete the visioning, goal setting, and management structure setup.

4. **Results of the Situation Analysis:**

- Market analysis – Assessment of current and potential demand. Who are current visitors to community, to nearby attractions, and potential customers? Who is buying similar products today? The market research process is complex and will likely require some outside help.
- Competitive analysis – Assessment of existing competitive destinations or experiences and your strengths, opportunities, weaknesses and threats (SWOT).
- Destination Analysis – Assessment of the community's infrastructure and tourism resources including human, cultural, natural and physical infrastructure assets,
- Map of the community identifying all of the assets identified in the resource and infrastructure inventory.
- Assess and set limitations or carrying capacity of community and/or environment. Identify the potential negative impacts and actions needed in order to avoid them.

See Section 6: Responsible Community Tourism Marketing provides details on identifying market potential including potential partnerships, target markets, and strategies to reach your potential customers. [Part 2](#) also provides links to Planeterra's Learning Hub for Marketing tutorials, and Appendix B contains a marketing plan outline. Section 4: Assessing the Community's Tourism Potential outlines the details for completing each of the elements of the Situation Analysis.

5. **Product Plan:** What products and services do you plan to provide?

- Based on your market assessment, your resource inventories, and your community goals, what are the types of tourism activities the community will offer?
- Consider the capacity, from a skills and financial resources perspective, what it will take to develop the products and services and if outside help will be required.
- *See Section 5: Developing Community Tourism Product and Experiences that provides an in-depth product development process.*

6. **Actions or Strategies to Achieve Your Goals:**

- For each action step, identify who is responsible and the timeline for achieving the goal or completing the step.
- Requirements to achieve the goals – financial, partnerships, government support or permits, construction, training, etc. Timelines for each action are critical to ensure all responsible parties are aware of their completion deadlines. At this stage a full budget should be created for the development of new infrastructure, training for developing skills of community members to deliver tourism services, and equipment required to launch the tourism experience.

See [Part 2: Managing a Community Tourism Enterprise & Experience](#) provides guidance on implementing the tourism plan and operating the tourism experience, including financial management and human resource development.

A-2 THE TOURISM PLAN - Detailed Strategic Planning Process

This section offers an action-oriented tourism planning process aimed at government officials tasked with developing a community tourism destination, or community development practitioners. We recognize that, as planners and managers, you may have a great deal of skepticism for spending valuable time and scarce resources towards planning, only to result in a document that gathers dust on an office shelf. Considering the complexity of the tourism system, the many individuals and groups who can affect the destination's future, some form of direction is required which is cooperative and proactive, like the community's vision statement, to guide planning and development.

This section will identify the actions required for developing and implementing effective sustainable community tourism strategies. The character of the process can be described as dynamic, participative and adaptable to the needs and concerns of the community's many stakeholders.

A-2.1 Introduction

Some managers and decision makers argue that we are overwhelmed with plans and planning processes. Others argue that we require more regulation and planning in order to ensure that the goals of sustainable tourism can be met. There are others that maintain that we require less planning and possibly less regulation. There is no right answer to the level of planning that a particular situation calls for and clearly every societal context will determine what is appropriate. Similarly, though sustainable tourism calls for a high level of local involvement in planning and development, the amount and quality of community participation will vary depending on the cultural and political factors in the destination. It is useless to develop a sophisticated planning system if there is no political or community support for it. In these cases, one might first have to create an appropriate setting or structure for a planning process which avoids the failures of past planning practices.

A-2.2 An Action Planning Approach

A strategic planning approach is essential for sustainable tourism, seeking an optimal fit between the system and its environment. Hence, it:

- Is long term.
- Contains vision.
- Specifies goals (ends).
- Specifies major actions (means) to achieve goals.
- Specifies the major resource allocations to arrive at (ways).
- Is dynamic, flexible, and adaptable.
- Ensures that formulation and implementation of the strategic plan are not discrete, but linked closely through constant monitoring, environmental scanning, evaluation, and adjustment.
- Is not a linear process (e.g., constant environmental scanning occurs throughout the process to enable proactive response and adjustment; monitoring can start as soon as target indicators and levels are established, to provide baseline information).

A strategic approach to a sustainable community tourism plan also requires:

- Close coordination with local and regional legislative and political structures.
- Community participation and support.
- A new role for planners as educators and providers of technical expertise, but not sole plan designers; the plan is designed primarily by those who have a stake in the outcome.
- An innovative and inclusive organizational structure for joint planning.
- A learning community that is informed, educated and aware.
- Applying the principles of sustainable tourism development, to ensure the long-term sustainability of the ecology, the local economy and the socio-cultural values of the host community, while distributing the benefits equitably among the stakeholders.

Strategic tourism plans are more than just tourism marketing plans. The destination's strategic tourism planning process is based on a marketing philosophy - the analysis of the destination's resources, the market and competitive analysis are all done with the aim to keep in mind the market's (i.e., the visitors) needs and preference, but also to ensure that the destination's tourism industry is compatible with the long-term sustainability of the natural environment and the needs and preferences of the local inhabitants. Sustainable tourism development requires an overall strategic planning approach that encompasses both the supply and demand side of the tourism system.

You can seek expert and technical help for various components of the plan. For example, facilitators, community colleges, planning and marketing consultants, local and regional government planners can be recruited if required. The assistance of an environmental specialist may be necessary to help establish ecological and climate indicators, for example. Such assistance may also be available through volunteer resources within the

community. Strategic tourism planning requires a careful consideration of the goals and principles of sustainable tourism. Some of the goals and principles which should be considered in tourism planning are presented in the following table.

Economic
Development which takes the full costs and benefits of the alternatives and decisions embarked upon into account, from an overall economic and community perspective.
Minimizing leakage of tourism revenues out of the destination and minimizing external control over tourism direction.
Broad-based distribution of benefits among the destination stakeholders.
Provision of a quality visitor experience that is compatible with the destination's goals and values.
Ensure that the fiscal costs of infrastructure provision and marketing do not outweigh the benefits (for example, residents may end up paying higher taxes to subsidize tourism development but may not benefit from improved income, social services, use of or access to the publicly constructed infrastructure, education, and training opportunities, etc.)
Social
Steady employment, which avoids the underemployment and unemployment associated with seasonal hiring for peak tourism periods.
Better employment opportunities than the low pay and positions typically associated with tourism services.
Quality jobs that encourage the use of local knowledge, skills, and traditions, and offer a sense of fulfillment and satisfaction to the residents.
Improved standard of living and equitable distribution of benefits within (and between) generations in the present and future.
Equitable access for residents to publicly constructed facilities and resources constructed for tourists.
Ecological
Maintenance of essential ecological processes, biological diversity and non-renewable resources for future generations (through preservation or conservation strategies).
Planning at a scale and pace that enables effective and ongoing monitoring and mitigation of long-term impacts.
Full-cost accounting of environmental resources in cost-benefit analyses.
Environmental and cumulative impacts analyses are important prerequisites to development. Environmental management systems need to be implemented by businesses and organizations.
Cultural
Visitor activities and behaviors should be respectful of local cultural activities, sites, and values.
Design should be compatible with local heritage and character and should foster the community's identity or 'sense of place'.

Visitor types, experiences and activities should match the needs and expectations of the local people, with protection of sensitive and Indigenous cultures against adverse impacts.
Political
Compatibility between overall economic development goals of the community and the tourism goals.
Integration of plans and planning with other relevant community and regional plans and processes.
Balance top-down planning with resident input and participation in planning and development, while being sensitive to local traditions and culture regarding decision making.

A-2.3. Strategic Tourism Planning Process

The major steps in the strategic planning process for tourism in a community destination is outlined in Figure A2. Note that while the steps appear sequential, the process is an iterative one. It is also important to note that this is a recommended process, not a blueprint for success - each destination may need to tailor this process to suit their own requirements, norms, and values. The stages are discussed below.



Figure A2 Strategic Planning Process

STAGE 1: Getting the Community Ready

This stage is discussed in detail in Section 3. Preliminary information gathering is required to enable a decision on whether to encourage tourism. The development of a community tourism organization (CTO), planning scope, and terms of reference for the CTO are a key subsequent step.

The formation of the CTO should consider the following:

- Who are the initiators of the tourism planning process? If not government officials (local, regional or national), has their support been acquired to initiate a tourism planning and development process?
- Have legitimate convenors been assigned to convene the stakeholders? Government officials may or may not be perceived to be unbiased participants or convenors of the process.
- The CTO must be perceived to be a capable organization by its members. Concerns about implementability of the strategic plan need to be addressed by the initiators and convenors as early as possible and emphasize the commitment of government and the community awareness and involvement in the planning process (by involving a diverse group of community actors). These should provide a powerful drive for implementation.
- The participants of the process must be legitimate representatives of the community and representative of a wide base of community interests. This could be aided by enabling representation through interest groups or sector-based participation (e.g., transportation, commercial, cultural, etc.). These interest groups or sectors could form steering committees, if required, to manage a large group of constituents.
- The CTO should be structured to enable early formation of subcommittees or working groups. These should be structured to enable the participation of a broader base of constituents from the community and a wider stakeholder base.
- Obtaining formal approval of the local government authority is recommended to ensure that the process has their approval.
- Getting stakeholders involved and obtaining local government or community leadership approval requires information on the scope of the planning exercise to be disseminated to the participants. The preliminary community analysis as well as further communication with the stakeholders can be used by the initiators to assist in defining the planning scope. The following should be included in defining the scope of the process:
 - Geographic area to be covered by planning.
 - A clear delineation of the purpose or goals of the planning exercise and problem statement (if the exercise is based on resolving existing tourism development related conflict).
 - Degree of public participation and mechanisms (structure plus terms for involvement, plus mechanism for replacing stakeholders).
 - Budget and funding for the exercise.
 - Estimated timeline for the process.
 - Consideration for how to address implementation concerns of stakeholders.

Once the CTO has been convened, the following steps which have been initiated earlier, can be firmed up:

- Terms of reference for the CTO participants, including ground rules for decision making and participation, an approximate timeline, and workplan for the major stages of the exercise.
- The CTO should be assigned to play a key role in this process, and sub-committees should be formed to manage various components of the action planning.
- The CTO should be fully involved in the community visioning exercise, including forming a visioning sub-committee or working group(s).

STAGE 2: Situation Analysis

The situation analysis stage involves a number of activities:

- Conduct a market analysis (current and potential tourist demand, activities desired, compatibility with community vision and values, etc.). *See Section 7.*
- Conduct a competitive analysis. Identify competitive destinations (existing and potential), assess their strengths and weaknesses, market shares, determine where opportunities and threats might lie for your destination, identify competitive advantages for your destination.
- Conduct a destination analysis. Assess the community's infrastructure and tourism resources, using the inventory of tourism related resources.
- Development of a comprehensive map of the community area, illustrating community features, location of recreation and tourism related resources, ecological factors (migration corridors, sensitive habitats, etc.), infrastructure and transportation access, etc.
- The identification and ranking of issues, problems and opportunities to be addressed based on the evaluation of the information gathered in this stage, and the information obtained from the community assessment and tourism visioning process (Stage 1). It is important to examine prior and existing local and regional plans which contain information relevant to tourism planning, to ensure that issues are understood and compatibility with overall local goals and plans can be accomplished.

Worksheet A.1 will assist you in this task. This stage is covered in detail in Section 4 of this Workbook.

STAGE 3: Goals and Strategies

The vision statement and the major goals of the community provide direction for evaluating and developing strategies and actions to accomplish vision and goals. As in the situation analysis, the visioning process and its content provide valuable information for this stage. Broad community goals may be evident in the community's tourism vision, and the exercise itself may contain information pertaining to some potential strategies. This again illustrates the non-linear nature of strategic planning. Strategies are not formed only in the allocated time for Stage 3, they may emerge earlier or later in the

process, and will need to be incorporated into the formal strategic planning as they are recognized.

In formulating strategies, the following considerations should be taken into account:

- Description of each actor's roles and responsibilities
- Private and public sector funding requirements and sources
- Product development strategies
- Monitoring strategies
- Marketing strategy
- Description of action plans
- Timetable of action planning

In order to negotiate goals, strategies, and action plans, it is important to focus the discussion on identifying interests and concerns of the stakeholders, rather than their positions, i.e., consider an interest-based negotiation philosophy (also referred to as principled negotiation). The process should include the following:

- Select a number of prioritized issues, problems and opportunities identified through the situation analysis and establish short and long-term strategic goals for these issues (e.g., 5-10-20 years or longer). Make sure that the issues and problems or opportunities are clearly defined. Complex, value-laden problems relating to human use versus environmental protection, can be present in communities located in sensitive ecological settings.
- Develop and assess alternatives for attaining goals. Good information is a critical requirement to be able to evaluate various alternatives. Set evaluation criteria where possible. Cost-benefit analysis of various alternatives is a critical requirement at this stage (see below). Ensure that the alternatives listed do not conflict with other community development goals or strategies.
- Scenario-based planning is one method that you may find useful to employ. Develop alternative future state pictures (as related to tourism and your community) and create alternative strategies for attaining the stated goals. For example, one scenario might be that if there is strong ongoing economic growth in Southeast Asia, then a marketing related strategy might be to focus on attracting a modest segment of high-yield tourists from one or more countries showing economic growth and increasing outbound tourism, to one or more attraction(s) in the destination area, e.g. nature-based (ecotourism) and culture based (annual heritage event). A related economic strategy would be to encourage development and use of local tour operators and marketers to enable benefits to flow to the local destination. Conversely, another scenario might be that if exchange rates in the future discouraged your primary foreign visitor market, then domestic tourism from regions X, Y, and Z would receive a stronger marketing focus, since the needs of this market (based on your market research and analysis) can be accommodated by the existing supply (with possibly a little extra work). Worksheet A.2 will assist you in this task.

- Formulate strategies to attain goals, based on the scenario you currently adopt (you will adjust these strategies or scenarios as you monitor the results and the changes in your external and internal environments). Strategic considerations for key areas related to tourism planning and development are outlined later in the section. Strategies for monitoring key community and environmental resources are a critical requirement at this stage. The development and selection of final strategies should be done carefully to ensure that these are feasible (e.g., financial options are available for implementation), in addition to appropriate (as determined from cost-benefit and other analyses).

Note that what you are developing here are goals and strategies for an overall strategic tourism plan for your community. Keeping a marketing orientation- i.e., thinking with your marketing cap on is critical at every step in the tourism planning process. At no time do supply considerations become disconnected from the demands of your tourism markets. Hence all the goals, strategies, and future planning actions are linked closely to each other and particularly to marketing goals and strategies. In Stage 3, the detailing of objectives and action plans will again be done closely in conjunction with the marketing objectives and action program. Hence, strategic planning for tourism requires keeping the needs and requirements of your visitor markets at the forefront of your thinking, but always ensuring that these needs are balanced by the needs of your community and the principles of sustainable tourism (development).

Cost-Benefit Analysis

Applying a number of economic tools and methods, destinations are in a position to obtain a large array of economic information on tourism, from which decisions can be made. In assessing this information, analysts, planners, and managers have to determine not just whether jobs and wealth are created, but how the benefits are distributed, what costs result from tourism and whether the benefits outweigh the costs generated, both on economic and other levels. In this sense, economic analysis needs to be integrated with other data (environmental, social, cultural, etc.) to provide a reasonable indication of whether tourism is a good strategy for the destination. Cost-benefit analysis is an important activity to perform, but is also difficult to calculate, since a number of the costs are very difficult to quantify. How does one measure the “sense of place” or “spiritual happiness” of a population? How does one quantify the loss value of habitat fragmentation to ecological integrity? While there are some methods for developing full-cost, environmentally based accounting and assessing the “invisible burden” of tourism (See: Epler Wood, M., Milstein, M., Ahamed-Broadhurst, K., 2019. *Destinations at Risk: The Invisible Burden of Tourism*. The Travel Foundation), some measures may need to remain qualitative rather than quantitative.

Full-scale cost-benefit analysis, while recommended, can be time consuming, expensive, and difficult to conduct. Another challenge in cost-benefit analysis lies in identifying who benefits and who pays the costs of tourism. Smaller cost-benefit analyses can be

completed to provide information on specific issues related to tourism. Consider the costs of overcoming obstacles and providing infrastructure. How well do residents who may end up paying higher taxes to subsidize the cost of public infrastructure for tourists benefit from the tourism? Are opportunity costs being considered? For example, would the public funds being expended on developing and promoting tourism generate greater benefits to the citizens if expended in another area of community development?

Stage 4: Objectives and Action Programs

Objectives and action plans are developed to accomplish goals and to carry out the strategies outlined in the previous stage. Objectives put a goal into action by specifying concrete, measurable targets to be achieved in a stipulated time frame (e.g., one, three, or five years). Objectives can be prioritized for action as well, though all should be implemented in order to achieve the associated goals. Alternatives should be examined before selecting specific objectives. Cost- benefit analyses and preliminary impact assessments (environmental, cumulative, etc.) are two important considerations at this stage. Use worksheets A.1 to A.3 to help you through this process.

Formulate Strategies

Carrying capacity indicators need to be established within the various issue areas. These indicators will facilitate the setting of objectives related to carrying capacity, i.e., the level or threshold of use or impact that a resource can handle without seriously affecting the health or survivability of that resource. Carrying capacities can be established for environmental, social, cultural, and visitor aspects. For example, a specific environmental objective may be to ensure that phosphate pollution into the local river from hotel detergent waste is, over the next 5 years, brought down to or just below the level stipulated as the carrying capacity threshold of the river for phosphates. A future objective might be to bring it well below the carrying capacity threshold. Similarly, a beach area may have a specific visitor carrying capacity, beyond which the quality of visitor experience may be seriously damaged due to overcrowding, noise, plastic waste, etc.

Note that as the community develops its information base on carrying capacity and other indicators, adjustments may need to be made to the community's goals, strategies, objectives, and action programs, based on the evaluation of the data being received.

Action Programs/Action Plans

Action programs are specific operational plans for implementing the strategies and achieving the specified objectives tied to each strategic goal. These programs contain detailed budget, financial and action plans for achieving the set objectives. Like the strategies, the action programs have to be feasible and realizable; feasibility studies are generally required for assessing the merit of development projects. The help of experts

may be required at this stage to develop the specific operational plans. These plans should also be compatible with local legislative frameworks (planning, land-use, etc.).

Financing projects can be a serious challenge for small communities, and steps have to be taken to ensure that the project receives the necessary financial support. Careful evaluation of alternative actions to implement the specific objectives is required, with close attention paid to the investment and financing aspects of the plan. Business planning, pre-feasibility, and feasibility studies should be conducted for new projects and ventures. Public-private sector cooperation in developing and implementing action programs is highly recommended. New and innovative partnership actions should be considered, including joint-ventures, trusts, cooperatives, development corporations, and community councils. Implementation plans include a wide range of actions and considerations.

The major steps in this stage are as follows:

- **Develop objectives** (short and long-term) for each strategic goal, in the priority assigned to the goals. An objective for a resource may have a series of sub-objectives associated with it. Identifying resource development objectives may be aided by ranking the resources against the community's other major goals.
- **Identify and evaluate alternatives** for implementing objectives. Obtain necessary information (via market research, pre-feasibility studies, etc.) and list criteria for evaluating alternatives, e.g., financial feasibility, sources of funding, compatibility with development, and zoning regulations, etc. It is important to develop the criteria, since it will help you evaluate the viability of these alternatives. Suggesting a mega-resort would not make sense if it is not compatible with the zoning (existing or potential) or the vision of the community.
- **Develop action programs** (including budgets and financial plans, as well as business plans where necessary) for each objective.
- **Refine and develop further indicators** and thresholds for various areas related to carrying capacity concerns in the action plans. The monitoring of critical community, tourism, and environmental indicators and thresholds should commence as soon as possible, in order to ensure that some baseline data is available to compare future results against (especially if little exists so far).
- **Implement strategies and action programs**, as soon as complete, with monitoring to start concurrently, if not sooner.

The ability of the strategic planning exercise to generate a dynamic, action-oriented plan for the destination is dependent on the planning process' ability to involve a wide range of community actors, and to monitor and evaluate plans and processes on a regular basis, with the help of an effective organizational structure. In addition, implementation requires paying close attention to strategies for coordination, cooperation, and public support:

- **Coordination:** Close coordination at both policy and action levels is required among the various agencies involved at different public levels. Public service provisions (e.g., transportation, water, and sewer capabilities) need to be considered in tourism planning. Hence, the action program has to clearly delineate the various jurisdictions and governmental departments that will need to be involved in the plan's implementation. Close coordination will be required at an inter-departmental and inter-jurisdictional level to ensure a holistic approach to implementation and cohesiveness of the overall plan. Public- private partnerships should be explored for development and funding of tourism initiatives. New forms of partnership and governance may be needed to ensure the integrity and success of the implementation process.
- **Linking strategies and plans:** Tourism strategies and plans must be linked to and viewed as a component of the broader set of community development plans and initiatives. Tourism planning should also be afforded positive status among other local plans.
- **Cooperation:** Cooperation among local businesses and tourism related operators is essential, given that one business can be directly affected by the success or failure of another. Partnerships should be considered in planning, management, marketing, and funding of tourism ventures. Cooperation among neighboring communities in the region is important - by working together, communities can capture a range of benefits for the entire region. Independent effort in areas such as marketing could undermine the tourism potential of a region and could result in a duplication of effort and waste of resources.
- **Public support:** public support of the tourism planning process and its implementation are critical to the success of the planning effort. Using the community awareness and involvement strategies suggested in this section and in Section 3 (Getting the Community Ready), progress on the plan should be communicated to the community and feedback sought on the various stages. Community involvement and support is essential to ensure that the plan is implemented and is representative of the needs and aspirations of the inhabitants.

Stage 5: Monitoring, Evaluating, And Adjusting Action Plans

The success of the tourism planning effort is greatly dependent on the ability of the process to monitor the implementation of the action plans, the achievement of the objectives, and the setting and monitoring of critical indicators and thresholds related to the resources being used. Indicators and thresholds can be established, for example, for the ecology (e.g. develop indicators to monitor air quality, water quality, habitat fragmentation), for the economy (e.g. jobs, tourism income, and expenditures), for the visitors (e.g. numbers, length of stay, activities performed, satisfaction), and for the overall tourism industry (e.g. codes of ethics, interpretation activities, etc.).

For example, if a heritage site exceeds a certain threshold of damage (as monitored through specific indicators measuring site degradation, noise pollution, etc.), then action has to be triggered to manage this problem. The steps would include:

- Set up an administrative structure and research database to aid monitoring activities. CTO sub-committees for the various issues can be utilized to guide this aspect of the process.
- Rank and select key indicators for monitoring various impact areas. Develop specific indicator parameters (with the help of experts as required), for example, habitat fragmentation could be monitored using a specified sub-set of indicators, such as large mammal mortality, reproduction rate, etc.
- Monitor thresholds and indicators on an ongoing basis. Scan external and internal environments regularly (e.g., community attitudes and support, market and competitive analysis).
- Evaluate results on a regular basis and adapt strategic plans accordingly. Reinforce successes, mitigate negative impacts and adapt planning to ensure accomplishment of objectives, goals, and the vision over the long-term.

The tourism strategic action plan is a flexible and dynamic document, where planning and implementation are closely connected, so that the plan's content is adjusted actively as results are obtained from the monitoring and environmental scanning activities. This constant monitoring is critical to ensure long-term sustainability of the community's resource base and the achievement of community goals. Longitudinal, long-term research and information gathering on environmental and other indicators is a necessary action. More details are provided in *Section 7* for developing and implementing a monitoring and evaluation strategy.

A-2.4. Resource Development and Maintenance -Strategic Considerations

Once the major issue areas, problems, and goals are identified, options for addressing these issues can be examined and strategies proposed. These are broad-based strategies relating the overall strategic goals developed earlier in the process. The development of objectives and specific action plans then follow in order to enable the strategies to be implemented. Clearly, the complexity of the issues and the large number of areas to be considered in a strategic tourism plan make it essential that the CTO provides strong leadership and organization to the planning process. CTO sub-committees assigned for each of the major issue areas can play a vital role in:

- ensuring that goals and strategies for their specific areas are developed, approved by the whole CTO and then implemented.
- overseeing the development of specific operational objectives and plans.
- ensuring that monitoring and evaluation is being conducted in the various projects.
- forwarding suggestions for plan adjustments to the main CTO for approval.

The following table outlines some areas that should be considered in the formulation of tourism strategies and action programs.

<p>Tourism products: accommodation, hospitality, attractions, experiences events, other visitor services:</p> <p>Scale and type of development (favor small scale, minimize impacts, incremental [staged] development).</p> <p>What kind of tourism activities (ecotourism, cultural, etc.), facilities, attractions, and amenities? Tourism products to be developed based on Section 4 (supply side/community assessment), competitive analysis, market research, ecological assessments, and community needs and issues analysis.</p> <p>Minimizing negative impacts through design, land-use planning, zoning, and management. Fit with design plan.</p> <p>Develop financing strategies for projects - focus on local control and minimizing leakage.</p> <p>Communicate tourism vision statement and goals to commercial and other stakeholders.</p>
<p>Marketing:</p> <p>Plan: product market matching, target market selection (based on market research, activities conforming to sustainable tourism, resident attitudes, and needs, etc.).</p> <p>Destination image (construct, ensure authenticity).</p> <p>Destination management organization (DMO)- create, plus assign roles and responsibilities.</p> <p>Financing DMO.</p> <p>Destination promotion strategies (by DMO and other channels).</p> <p>Visitor information centers, rest-stops.</p> <p>Destination management systems (database of visitor information, etc.).</p> <p>Strategic goals/objectives and inventory information from an overall tourism strategy should be used in the tourism marketing planning process (e.g., product information for product-market matching).</p> <p>Note: High yield tourists are a good objective for sustainable tourism but be realistic too. Mass tourism will not easily disappear, and some communities will have to find strategies to balance mass tourism with alternative high yield tourism, and to manage the negative impacts of both mass and alternative tourism.</p>
<p>Visitor management and education:</p> <p>Growth management policies for tourism growth.</p> <p>Code of ethics/behavior for tourists and tour operators.</p> <p>Communicate community tourism vision statement to visitors.</p> <p>Zoning/planning for tourist/resident interaction (where to minimize, maximize),</p> <p>Community involvement in interpretation activities.</p>

Technology:

Destination databases for resource inventory, tourism statistics and research database (on environmental and other monitoring indicators).

Self-help computer terminals at visitor centers, transportation centers (train, airport).

Online advertising and promotion/digital marketing, bookings for events, accommodation, local tours etc.

Mobile-enabled check-ins and check-outs at accommodation facilities.

Infrastructure and transportation:

Signage.

Access.

Financing.

Encourage use and development of public transit systems (sustainability).

Ecology/environmental management:

Limits of acceptable use.

Environmental and cumulative impact assessments for projects.

Precautionary principle.

Appropriate tourism and recreational use strategies for environmental assets based on zoning, sensitivity to impacts, etc.

Ensure the area has comprehensive maps showing interrelation of wildlife areas, corridors, human use and development.

Environmental management systems for projects and businesses, database of environmental and ecological information

Design plan for developing attractions and facilities:

Visitor management, parking, access.

Design compatible with local heritage, maintain a sense of place, enhance local architecture and culture.

Managing cultural/heritage assets:

Management plan for historic sites.

Protection of cultural/heritage assets (inventory).

Community involvement:

Establish communication policies to ensure ongoing community involvement and support (e.g., tourism awareness programs). Survey community attitudes periodically.

Establish mechanisms for community consultation plus conflict resolution on development projects and ongoing destination planning and development.

Establish economic and social policies to encourage local entrepreneurship and local involvement in tourism development, and to ensure that tourism benefits are distributed broadly in the community.

Local training and education:

To ensure local involvement in tourism rather than having to import workers and expertise (facilitate local control over development - important for sustainable tourism development, reduce leakage of revenues, enable import substitution, generate employment, etc.).

Linkages with area and regional educational institutions.

Delivery (formal in-class, distance education, computer-based learning packages, publications, manuals, etc.).

Legislative and political:

Establish a tourism policy for your community.

Ensure tourism action plan fits with other community plans and community vision, as well as with regional, national, and global tourism policies.

Determine what can be done locally and what requires regional, national government assistance (establish cooperation with other government levels as required).

Are political and legislative structures set up for enabling sustainable tourism development?

Monitoring and evaluating - indicators and thresholds:

Indicators to measure ecological, social, cultural, and economic carrying capacity and sustainability.

Objectives and thresholds for vital resources.

Alternative measures for ensuring thresholds are not exceeded.

Alternative mitigation measures.

Organizational responsibility for monitoring (CTO sub-committees or?). Database system for compiling monitoring data

Destination maintenance and management:

Plans for upkeep of infrastructure e.g., roads to attractions.

Preventative measures to minimize erosion or degradation of artifacts and sites.

Waste reduction efforts - Reduce, re-use and recycling policies.

Use community volunteer resources.

Establish strategies to manage carrying capacity and identify alternative mitigation measures to consider if tolerance thresholds are exceeded.

CTO management:

Budget and financing.

Sub-committees.

Managing volunteer participation and burnout.

Ensuring monitoring, evaluation, and adjustment of strategic plan

Regulation and legislation:

Zoning regulations and other permits (compatible with type and scale of development proposed?), environmental permits, construction permits, operation permits

Development standards.

Licensing regulations for accommodation and hospitality services.

APPENDIX B

MARKETING PLAN OUTLINE

The following is an outline of a typical marketing plan for a destination marketing organization:

Vision and goals for the destination.
General marketing goals (e.g., to increase market share; growth targets; focus on yield and quality).
Situation analysis and market research includes: <ul style="list-style-type: none">• Forces and trends (especially values)• Future scanning (what might happen without sustainable strategies; the ideal future state)• Organizational audit (how well are we doing in implementing sustainable tourism?)• Assessment of competition• Evaluation of marketing effectiveness and efficiency
Resource and supply appraisal: <ul style="list-style-type: none">• Resources for tourism (and their sensitivity)• Inventory of supply• Portfolio of experiences and services• Capacity assessment (projecting permissible or desirable levels and types of use or development)• SWOT analysis (especially identifying problems, and opportunities for sustainable tourism)
Assessment of market potential: <ul style="list-style-type: none">• Research results on existing and potential markets• Demand forecast for target market segments
Strategies, goals, and objectives: <ul style="list-style-type: none">• For increasing market share• For sustaining resources and infrastructure• For improving visitor service and satisfaction
Action plan and budget: <ul style="list-style-type: none">• Designation of responsibility for implementation• Setting target dates• Allocation of resources (the budget)
Evaluation: <ul style="list-style-type: none">• Stating key performance criteria to measure success• Establishing the evaluation process (e.g. tracking studies)

A summary of the research and analysis should be included in the actual marketing plan. Goals and objectives should be clearly stated, strategies articulated, and an action plan and budget stated. The marketing plan is usually revised annually in light of ongoing research and evaluation of its effectiveness. It should incorporate a multi-year strategy for each element of the marketing mix, as few strategies can be implemented fully in one year.

APPENDIX C

GUIDELINES FOR COMMUNITY EVENT DEVELOPMENT

An area in which numerous communities develop tourism is through festivals and other special events. Where events are based on community interests and traditional customs, they can become attractive authentic visitor experiences and places where hosts meet guests in an equitable manner.

1. DEVELOPING A SUSTAINABLE EVENT CONCEPT
Choose authentic themes which reflect the local culture(s) and environment-human relationships.
Require strong community support, do not impose new ideas on an unreceptive population.
Avoid parachuting in successful ideas from other places; success comes from strong local commitment and enthusiasm.
Choose themes which help position the destination within sustainable development principles.
Consider sports or traditional recreational activities; many competitions and fun events can be held using existing facilities.
Ask local community groups, associations, and businesses to generate meetings and events, to the extent permitted by infrastructure.

2. DEVELOPING THE ORGANIZATIONAL STRUCTURE
Consider setting up a fund to help local organizations bid on events and meetings.
Ask local groups to submit plans for creating, enhancing or marketing festivals and other special events with potential tourist appeal.
Assist organizations in marketing their events.
The best festival organizations for most communities are separate non-profit associations with strong connections to their groups and to the municipal agencies

3. IDENTIFY FUNDING SOURCES
Providing event organizations with financial assistance can provide a good return for public agencies; it is often best to assist bids, marketing, and research rather than to provide operating funds.
Secure tourism marketing grants and marketing advice from senior government and industry associations.

Privately owned resorts, attractions, and facilities should be able to launch their own special events, ensure coordination with other events as to time, place, and theme.

Obtain sponsorship (both cash and in-kind donations) from local companies before pursuing regional and national businesses.

Sponsorship is an excellent way to obtain resources and extend the marketing reach of events.

4. MARKETING

Promote events locally and regionally first, before trying to attract tourists from afar.

Cultivate bus tours from nearby cities, ensure that the services available to tours are of high quality.

Do not exaggerate or suggest more than can be delivered, remember that many quality tourists prefer small and 'folksy' experiences.

Encourage residents to invite friends and relatives.

Obtain free publicity through local and regional media sponsorship.

Maximize word-of-mouth and social media recommendations by ensuring that every event goer has a great experience and receives information about next-year's events.

Hold the event at the same time and place every year, if at all possible, so that it is predictable.

APPENDIX D: WORKSHEETS

Worksheet 3.1 Assessing Your Community's Readiness for Tourism

<p>Following are some questions designed to help gather information which will enable you to assess your community's needs and readiness for tourism.</p> <p>Note: some of this information may be available through existing reports, plans, and documents. Other information may need to be newly gathered.</p>
Economic
What is the employment picture in your community? Is it seasonal? Do youth leave the community to seek employment?
How are 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?
What is the tax picture in your community?
Social/Cultural
What do you enjoy most and least about living in this community?
What are the things that you are most proud of about your community?
Are you satisfied with the range of leisure activities in your community?
How do you feel about sharing your community, culture and natural environment with tourists?
What facilities or services are lacking in the community?
What aspects of your culture are at risk of being lost or being negatively impacted by visitors?
Environment (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 tourist attractions and services well marked? How about signage into the community from the main access points?
Is there anything needed to enhance community character, image?
Type and scale of development desired?

Other What concerns do you have about the current level of tourism in the community? What concerns would you have regarding an increase in tourists?
--

Worksheet 3.2 Community Vision, Attitudes, Issues, Concerns, Principles, and Values

Please list the community and regional relevant plans, policies and strategies and then indicate what dimensions are dealt with in these plans and initiatives.

Plan/ Initiative	Economic Development	Tourism	Social	Cultural	Environment	Vision Statement
Local						
Regional						

Worksheet 3.3 Gauging Support of Key Actors and Groups

[illegible]

Worksheet 3.4 Community Vision, Attitudes, Issues, Concerns, Principles, and Values.

Community tourism vision
Values underlying the vision
Principles to guide the implementation of the vision
Community attitudes toward tourism revealed by visioning process
Issues and concerns identified by the visioning process

Worksheet 4.1 Resource Inventory: Built Cultural Heritage Resources

This first chart is a brainstorming exercise. In order to determine what you think is most important for tourism, list all the cultural heritage resources you can think of in your community and region on the chart below. Then decide which are your priorities.

Type of resource	Name of resource
Sites	
Historic Buildings	
Cultural Landscapes	

Worksheet 4.1.1 Built Cultural Heritage Resource

A cultural heritage resource may have developed visitor facilities or it may not; it may have economic spin-offs or it may not. Make note of what is unique and/or important. Make a copy of this form for each resource to be assessed.

You can rate the condition of each of these descriptors to help you prioritize areas of development for the resource and to help create a comparative scale among them.

VG: Very Good; G = Good; P = Poor. If rating is not applicable simply mark N/A across the columns.

Characteristic	Descriptor	VG	G	P
Location				
Size				
Nature of facilities: (e.g. washroom, interpretive centre/signs, paved walkway, visitor information)				
Visitor Capacity: (how many visitors can it hold?)				
Transportation Access: (e.g. highways, roads, signs)				
Parking Facilities: (how many parking stalls? are there enough stalls?)				
Results of customer surveys				
Social Impact: (e.g. is the area a social hub? is it overcrowded?)				
Environmental Impact: (e.g. is there litter? physical, water pollution, degradation? vandalism?)				
Economic Impact (are there economic spin-offs from the use of the site?)				
Use Level (is the site busy or not?)				

Demand for the Resource (is there demand? who are the visitors?)				
Community Goals and Objectives (how does the site fit in with community policies?)				
Competitive Position (how does the site rank with other sites within the community and region?)				

Worksheet 4.3 Resource Inventory: Living Cultural Heritage Attractions

Attractions can be developed sites or living cultural heritage which may be of interest to visitors. When listing such attractions, think about settlement patterns, languages, lifestyles, work patterns, and folklore.

This first chart is a brainstorming exercise. In order to determine what you think is most important for tourism, list all the living cultural heritage attractions you can think of in your community and region on the chart below. Then decide which are your priorities. Having chosen your priorities from the brainstorming exercise fill in the forms which follow.

Type of resource	Name of resource

Worksheet 4.3.1 Living Cultural Heritage Attractions

This type of attraction is a site or an area of local historical significance. Make note of what is unique and/or important for tourism development.

You can rate the condition of each of these descriptors to help you prioritize areas of development for the resource and to help create a comparative scale among them.

VG: Very Good; G = Good; P = Poor. If rating is not applicable simply mark N/A across the columns.

Characteristic	Description	VG	G	P
Location				
Size of attraction				
Settlement Patterns				
Language(s)				
Lifestyles				
Work Patterns				
Folklore				
Nature of facilities (e.g. washrooms, interpretive centre, paved walkway, visitor information)				
Visitor Capacity (how many visitors can be accommodated?)				
Transportation Access (e.g. highways, roads, signs)				
Parking Facilities (how many parking stalls? are there enough stalls?)				
Results of customer surveys				
Social Impact (e.g. is the area a social hub? is it overcrowded?)				

Characteristic	Description	VG	G	P
Environmental Impact (e.g. is there litter? physical degradation? vandalism?)				
Economic Impact (are there economic spin-offs from the use of the site?)				
Community Goals and Objectives (how does development of the site fit in with community policies?)				
Competitive Position (how does the attraction rank with other sites within the community and region?)				

Worksheet 4.4 Resource Inventory: Special Events

This first chart is a brainstorming exercise. In order to determine what you think is most important for tourism, list all the special events you can think of in your community and region on the chart below. Then decide which are your priorities. Having chosen your priorities from the brainstorming exercise fill in the forms which follow.

Type of resource	Name of resource
Festivals	
Holiday Celebrations	
Other Special Events	

Worksheet 4.4.1 Special Event

You can rate the condition of each of these descriptors to help you prioritize areas of development for the event and to help create a comparative scale among the events.

VG = Very Good; G = Good; P = Poor. If rating is not applicable simply mark N/A across the columns.

Characteristic	Descriptor	VG	G	P
Location				
Size				
Theme				
Nature of facilities (e.g. permanent, temporary)				
Visitor Capacity (how many visitors does it attract?)				
Parking Facilities (how many parking stalls? are there enough stalls?)				
Social Impact (e.g. are locals affected by overcrowding and congestion?)				
Environmental Impact (e.g. is there litter? physical degradation? vandalism?)				
Economic Impact (are there economic spin- offs from the event?)				
Community Goals and Objectives (how does the event fit in with community policies?)				
Competitive Position (how does the event rank with others in the community and region?)				

Worksheet 4.5 Resource Inventory: Regional Attractions

This first chart is a brainstorming exercise. In order to determine what you think is most important for tourism, list all the community landscape features you can think of in your community and region on the chart below. Then decide which are your priorities.

Having chosen your priorities from the brainstorming exercise fill in the forms which follow.

Type of resource	Name of resource
Landmarks	
Structures	
Parks	
Other Natural Features	
Farms	
Cooperatives	
Tours	
Interpretive Sites	
Historic Sites (see)	

Worksheet 4.5.1 Regional Attraction

A regional attraction is a site of historical or cultural significance. It may be of interest to visitors or it may not; it may require parking facilities or it may not. These are the types of descriptions you will be making below. Make note of what is unique and/or important.

You can rate the condition of each of these descriptors to help you prioritize areas of development for the event and to help create a comparative scale among the events.

VG = Very Good; G = Good; P = Poor. If rating is not applicable simply mark N/A across the columns.

Characteristic	Descriptor	VG	G	P
Location				
Size				
Nature of facilities (e.g. washrooms, interpretive signs, paved walkway)				
Visitor Capacity (how many visitors can it hold?)				
Transportation Access (e.g. highways, roads, signs)				
Parking Facilities (how many parking stalls? are there enough stalls?)				

Worksheet 4.5.2 Regional Attractions: Tours

A driving, cycling or walking tour of local historical significance may be ready for visitors or it may not; it may require parking facilities or it may not. These are the types of descriptions you will be making below. Make note of what is unique and/or important. Make a copy of this form for each tour to be assessed.

You can rate the condition of each of these descriptors to help you prioritize areas of development for the event and to help create a comparative scale among the events.

VG = Very Good; G = Good; P = Poor. If rating is not applicable simply mark N/A across the columns.

Characteristic	Descriptor	VG	G	P
Location				
Length of Tour				
Nature of facilities along the way (e.g. rest stops, washrooms, interpretive signs, visitor information)				
Transportation Access (e.g. highways, roads, signs) Is the tour easy to follow?				
Use Level (is the tour popular or not?)				
Fit with community goals (how does the tour fit in with community economic and tourism goals and/or policies? is there an economic benefit for promoting a driving/cycling/walking tour?)				

Worksheet 4.5.3 Regional Attractions: Interpretive or Historic Site

An interpretive or historic site may have developed visitor facilities or it may not; it may have economic spin-offs or it may not. These are the types of descriptions you will be making below. Make note of what is unique and/or important. Make a copy of this form for each site to be assessed.

You can rate the condition of each of these descriptors to help you prioritize areas of development for the event and to help create a comparative scale among the events.

VG = Very Good; G = Good; P = Poor. If rating is not applicable simply mark N/A across the columns.

Characteristic	Descriptor	VG	G	P
Location				
Size				
Nature of facilities (e.g. washrooms, interpretive centre, paved walkway, visitor information)				
Visitor Capacity (how many visitors can it hold?)				
Transportation Access (e.g. highways, roads, signs)				
Parking Facilities (how many parking stalls? are there enough stalls?)				
Customer Survey designed in house				
Customer Survey designed externally				
Social Impact (e.g. is the area a social hub? is it overcrowded?)				
Environmental Impact (e.g. is there litter? physical degradation? vandalism?)				

Economic Impact (are there economic spin-offs from the use of the site?)				
Use Level (is the site busy or not?)				
Policy Fit (how does the site fit in with community economic and tourism policies?)				
Competitive Position (how does the site rank with other sites within the community and region?)				

Worksheet 4.6 Resource Inventory: Natural Features

This first chart is a brainstorming exercise. In order to determine what is most important for tourism, you should talk to your local experts (e.g. high school geography teacher, local weather person). Then list all the natural features you can think of in your community and region on the chart below. Make note of which you consider to be priorities for tourism.

Type of Feature	Name of Feature
Climate:	
Dominant land forms	
Topography	
Vegetation	
Waterfalls	
Rivers	
Lakes	
Shorelines	
Views	

Worksheet 4.6.1 Natural Features: Climate

Make note of what is unique and/or important. You can rate the condition of each of these descriptors to help you prioritize areas of development for the event and to help create a comparative scale among the events.

VG = Very Good; G = Good; P = Poor. If rating is not applicable simply mark N/A across the columns.

Season	Description	VG	G	P
Spring				
Months				
Precipitation				
Sunshine				
Temperature				
Summer				
Months				
Precipitation				
Sunshine				
Temperature				
Autumn				
Months				
Precipitation				
Sunshine				
Temperature				
Winter				
Months				
Precipitation				
Sunshine				
Temperature				

Worksheet 4.6.2 Natural Feature

A natural feature is a site of local geographical significance. It may have developed visitor facilities or it may not; it may have economic spin-offs or it may not. These are the types of descriptions you will be making below. Make note of what is unique and/ or important. Make a copy of this form for each site to be assessed.

You can rate the condition of each of these descriptors to help you prioritize areas of development for the event and to help create a comparative scale among the events.

VG = Very Good; G = Good; P = Poor. If rating is not applicable simply mark N/A across the columns.

Character	Description	VG	G	P
Location				
Size				
Nature of facilities (e.g. washrooms, interpretive centre/signs, paved walkway, visitor information, concession)				
Visitor Capacity (how many visitors can it hold?)				
Transportation Access (e.g. highways, roads, signs)				
Parking Facilities (how many parking stalls? are there enough stalls?)				
Social Impact (e.g. is the area congested? will tourism make it worse?)				
Environmental Impact (e.g. is there litter? physical degradation? vandalism?)				
Economic Impact (are there economic spin-offs from the use of the site?)				
Use Level (is the site busy or not?)				

Worksheet 4.7 Resource Inventory: Recreation Features

This first chart is a brainstorming exercise. In order to determine what you think is most important for tourism, list all the recreation areas you can think of in your community and region on the chart below. Then decide which are your priorities. Having chosen your priorities from the brainstorming exercise fill in the forms which follow.

Type of resource	Name of resource
Parks/Natural Areas	
Picnic Areas	
Campgrounds	
Golf Courses	
Boating	
Playing Fields	
Swimming	
Sports Facilities	
Hiking Trails	
Walking Pathways	
Cycling Routes	

Worksheet 4.7.1 Recreation Feature

A recreation feature is a site of local recreational significance. It may be developed for visitors or it may not; it may require parking facilities or it may not. These are the types of descriptions you will be making below. Make note of what is unique and/or important. Make a copy of this form for each site to be assessed.

You can rate the condition of each of these descriptors to help you prioritize areas of development for the event and to help create a comparative scale among the events.

VG = Very Good; G = Good; P = Poor. If rating is not applicable simply mark N/A across the columns.

Characteristic	Descriptor	VG	G	P
Location				
Size of park/area				
Nature of facilities (e.g. washroom, cooking facility, interpretive signs, concession, pool, gym, path paving)				
Visitor Capacity (how many visitors does it attract?)				
Transportation Access (e.g. highways, roads, signs)				
Parking Facilities (how many parking stalls? are there enough stalls?)				
Social Impact (e.g. are locals affected by overcrowding and congestion?)				
Environmental Impact (e.g. is there litter? physical degradation? vandalism?)				
Economic Impact (are there economic spin-offs? e.g. concessions)				

Use Level (is the site busy or not?)				
Community Goals and Objectives (how does the recreation feature fit in with community policies?)				
Competitive Position (how does the recreation feature rank with others within the community and region?)				

Worksheet 4.8 Resource Inventory: Entertainment

This first chart is a brainstorming exercise. In order to determine what you think is most important for tourism, list all the entertainment sources you can think of in your community and region on the chart below. Then decide which are your priorities. Having chosen your priorities from the brainstorming exercise fill in the forms which follow.

Type of resource	Name of resource
Restaurants and Cafes	
Cinemas	
Dance and Theatre Venues	
Live Music Venues	
Dance/Karaoke Clubs	

Worksheet 4.8.1 Entertainment

An entertainment venue may have developed customer surveys or it may not; it may have local economic spin-offs. These are the types of descriptions you will be making below. Make note of what is unique and/or important. Make a copy of this form for each entertainment venue to be assessed.

You can rate the condition of each of these descriptors to help you prioritize areas of development for the event and to help create a comparative scale among the events.

VG = Very Good; G = Good; P = Poor. If rating is not applicable simply mark N/A across the columns.

Characteristic	Descriptor	VG	G	P
Location				
Size of the venue				
Nature of facilities (e.g. type of eating/drinking establishment, type of dance/music)				
Visitor Capacity (how many visitors can it accommodate?)				
Parking Facilities (how many parking stalls? are there enough stalls?)				
Is there a Customer Survey? internal or external?				
Social Impact (e.g. will service be affected by overcrowding and congestion?)				
Environmental Impact (e.g. are garbage facilities adequate? will potential expansion effect the surrounding aesthetic?)				
Economic Impact (are there local economic spin-offs from the venue?)				

Community Goals and Objectives (how does the venue fit in with community policies?)				
Competitive Position (how does the venue rank with similar sites in the community and region?)				

Worksheet 4.9 Resource Inventory: Everyday Activities

This first chart is a brainstorming exercise. In order to determine what you think is most important for tourism, list all the everyday activities you can think of in your community and region on the chart below. Then decide which are your priorities for tourism development. Having chosen your priorities from the brainstorming exercise fill in the forms which follow.

Work	
Shopping	
Agriculture	
Recreation	
Houses of Worship	
Crafts	
Eating/Food Specialties	

Worksheet 4.9.1 Everyday Activity

An everyday activity can be of local significance. It may have helped to shape the community; it may have economic spin-offs or it may not. These are the types of descriptions you will be making below. Make note of what is unique and/or important. Make a copy of this form for each everyday activity to be assessed.

You can rate the condition of each of these descriptors to help you prioritize areas of development for the event and to help create a comparative scale among the events.

VG = Very Good; G = Good; P = Poor. If rating is not applicable simply mark N/A across the columns.

Characteristic	Descriptor	VG	G	P
Location				
Size of industry				
Nature of facilities				
Visitor capacity for public tours				
Transportation Access (e.g. highways, roads, signs)				
Parking Facilities (how many parking stalls? Are there enough stalls?)				
Social Impact (e.g. are locals affected by overcrowding and congestion?)				
Environmental impacts (eg pollution)				
Economic Impact (are there economic spin-offs from the activity?)				
Use Level (e.g. employment, customer base, participation, attendance)				
Community Goals and Objectives (how does the activity fit in with community goals?)				

Worksheet 4.10 Resource Inventory: Community Publications/Collateral

This first chart is a brainstorming exercise. What does your community do to help visitor orientation? In order to inventory locally produced visitor aids which may be important for tourism, list all those you can think of in your community and region on the chart below. Then decide which are your priorities. Having chosen your priorities from the brainstorming exercise fill in the forms which follow.

Type of Visitor Aid	Name of Visitor Aid
Maps	
Brochures/Pamphlets	
Guidebooks	
Activity Lists	
Billboards/Signs	
Other Publications	

Worksheet 4.10.1 Community Publication

This section is intended to inventory locally produced visitor aids. What does your community do to help visitor orientation? Make note of what is unique and/or important. Make a copy of this form for each map to be assessed.

You can rate the condition of each of these descriptors to help you prioritize areas of development for the event and to help create a comparative scale among the events.

VG = Very Good; G = Good; P = Poor. If rating is not applicable simply mark N/A across the columns.

Characteristic	Descriptor	VG	G	P
Purpose				
Location/Area covered				
Size				
Format				
Distribution (number of copies distributed)				
Accessibility (where is it available?)				
Cost (is it free?)				
Is it up to date?				
Fit with Community Goals, Objectives and Policy				
Competitive Position				

Worksheet 4.11 Tourism Resources and Infrastructure: Access, Transport, & Parking

List below all of the infrastructural resources related to Access, Transport & Parking and check the level of importance to tourism. Where VI = Very Important, I = Important, and NI = Not Important. In this way you can begin to see what needs improvement or development to meet the demands of tourism. In addition to the obvious, consider such things as type of vehicle, touring routes, and off-road vehicle areas.

Infrastructural Resources	VI	I	NI
Access			
Transport			
Parking			

Worksheet 4.11.1 Assessment of Infrastructural Resources

Describe your assessment of the infrastructural resource in the table below.

Characteristic	Description
Are there adequate routes and ports for all modes of transport to and within the area?	
What is the potential for congestion or accidents?	
Are there potential pollution problems (e.g., noise; exhaust fumes)?	
Is there provision of rest areas/toilets?	
What is the pedestrian/vehicular separation (especially in town centres)?	
What is the current infrastructure capacity? (e.g. maximum number of users)	
What will infrastructure capacity requirements be as a result of tourism development? (e.g. total number of users)	
Is the resource suitable for the visitor types and their needs?	
Visitor Expectations: what are they? what are their quality standards? How will they be met?	
Safety Factor: how will you ensure a safe visitor experience?	
Comfort levels for tourists: how will you ensure a comfortable visitor experience?	
What improvement or development is necessary and what is the cost estimate? How will the cost be covered?	
What management strategy is required?	
Is market research necessary? If so, what should be studied?	

Worksheet 4.12 Tourism Resources and Infrastructure: Accommodation

List below all of the infrastructural resources and check the level of importance to tourism. Where VI = Very Important, I = Important, and NI = Not Important. In this way you can begin to see what needs improvement or development to meet the demands of tourism.

Infrastructural Resources	VI	I	NI
Accommodation			

Worksheet 4.12.1 Assessment of Accommodation Resource

Describe your assessment of the infrastructural resource in the table below.

Characteristic	Description
Are there adequate beds, rooms, units in the area?	
What is the seasonal supply variation?	
What is the type, quality, and price related to each market segment?	
What is the current infrastructure capacity? (e.g. number of beds)	
What will infrastructure capacity requirements be as a result of tourism development? (e.g. total number of beds)	
Is the resource suitable for the visitor types and their needs?	
Visitor Expectations: what are they? what are their quality standards? How will they be met?	
Safety Factor: how will you ensure a safe visitor experience?	
Comfort levels for tourists: how will you ensure a comfortable visitor experience?	
What improvement or development is necessary and what is the cost estimate? How will the cost be covered?	
What management strategy is required?	
Is market research necessary? If so, what should be studied?	

Worksheet 4.13 Tourism Resources and Infrastructure: Convenience and Comfort

List below all of the infrastructural resources and check the level of importance to tourism development. Where VI = Very Important, I = Important, and NI = Not Important. In this way you can begin to see what needs improvement or development to meet the demands of tourism.

Infrastructural Resources	VI	I	NI
Availability of public toilets			
Rest and picnic areas			
Cellular and Wifi Service			
Food & Beverage outlets (type, quality, accessibility)			
Viewpoints			
Banking/Money exchange			

Worksheet 4.13.1 Assessment of Convenience/Comfort Infrastructural Resource

Describe below your assessment of the infrastructural resource in the table below.

Characteristic	Description
Are there adequate units in the area?	
What is the seasonal supply variation?	
What is the type, quality, and price related to each market segment?	
What is the current infrastructure capacity? (e.g. maximum number of users)	
What will infrastructure capacity requirements be as a result of tourism development? (e.g. total number of users)	
Is the resource suitable for the visitor types and their needs?	
Visitor Expectations: what are they? what are their quality standards? How will they be met?	
Safety Factor: how will you ensure a safe visitor experience?	
Comfort for tourists: how will you ensure a comfortable visitor experience?	
What improvement or development is necessary and what is the cost estimate? How will the cost be covered?	
What management strategy is required?	
Is market research necessary? If so, what should be studied?	

Worksheet 4.14 Tourism Resources and Infrastructure: Energy

List below all related infrastructural resources and check the level of importance to tourism. Where VI = Very Important, I = Important, and NI = Not Important. In this way you can begin to see what needs improvement or development to meet the demands of tourism.

Infrastructural Resources	VI	I	NI
Energy Type			

Worksheet 4.14.1 Assessment of Energy Resource

Describe below your assessment of the infrastructural resource in the table below.

Characteristic	Description
Are there adequate units in the area?	
What is the current infrastructure capacity? (e.g. maximum amount of energy generated)	
What will infrastructure capacity requirements be as a result of tourism development? (e.g. total maximum amount)	
Is the resource suitable for the visitor types and their needs?	
Visitor Expectations: what are they? what are their quality standards? How will they be met?	
Safety Factor: how will you ensure a safe visitor experience?	
What improvement or development is necessary and what is the cost estimate? How will the cost be covered?	
What management strategy is required?	
Is market research necessary? If so, what should be studied?	
What are the potential impacts of additional use from visitors? (Environmental, Social, Costs)	

Worksheet 4.15 Tourism Resources and Infrastructure: Financial Resources

List below all related infrastructural resources and check the level of importance to tourism. Where VI = Very Important, I = Important, and NI = Not Important. In this way you can begin to see what needs improvement or development to meet the demands of tourism.

Infrastructural Resources	VI	I	NI
Private (lending institutions, investors, venture capital pools)			
Public (loans, grants, incentives)			

Worksheet 4.15.1 Assessment of Financial Resource

Describe below your assessment of the infrastructural resource in the table below.

Characteristic	Description
Are there adequate funds in the area?	
What is the current infrastructure capacity? (e.g. maximum funds available)	
What will infrastructure capacity requirements be as a result of tourism development? (e.g. total maximum funds available)	
What improvement or development is necessary and what is the cost estimate? How will the cost be covered?	
What management strategy is required?	
Is market research necessary? If so, what should be studied?	

Worksheet 4.16 Tourism Resources and Infrastructure: Health and Safety

List below all of the infrastructural resources and check the level of importance to tourism. Where VI = Very Important, I = Important, and NI = Not Important. In this way you can begin to see what needs improvement or development to meet the demands of tourism.

Infrastructural Resources	VI	I	NI
Health (medical facilities, emergency response units)			
Safety (police, fire, lighting)			

Worksheet 4.16.1 Assessment of Health and Safety Resource

Characteristic	Description
Are there adequate units in the area?	
What is the current infrastructure capacity? (e.g. number of responses)	
What will infrastructure capacity requirements be as a result of tourism development? (e.g. total number of responses)	
Is the resource suitable for the visitor types and their needs?	
Visitor Expectations: what are they? What are their quality standards? How will they be met?	
Safety Factor: how will you ensure a safe visitor experience?	
Comfort of tourists: how will you ensure a comfortable visitor experience?	
What improvement or development is necessary and what is the cost estimate? How will the cost be covered?	
What management strategy is required?	
Is market research necessary? If so, what should be studied?	

Worksheet 4.17 Tourism Resources and Infrastructure: Human Resources

Inventory Sheet

List below all of the infrastructural resources and check the level of importance to tourism. Where VI = Very Important, I = Important, and NI = Not Important. In this way you can begin to see what needs improvement or development to meet the demands of tourism.

Human Resources	VI	I	NI
Labor supply (type, volume, quality)			
Training facilities and programs			

Worksheet 4.17.1 Assessment of Human Resource

Describe below your assessment of the infrastructural resource in the table below.

Characteristic	Description
Is there adequate labor supply in the area? If not, where will it come from?	
Is there a seasonal labor supply variation?	
What is the type, volume and quality necessary in the labor supply?	
What is the current infrastructure capacity? (e.g. housing/accommodation for staff)	
What will human resource capacity requirements be as a result of tourism development? (e.g. housing/accommodation for staff)	
Is the labor pool suitable for the visitor types and their needs?	
Visitor Expectations: what are they? what are their quality standards? How will they be met?	
Attitudes: how do locals perceive tourism and related jobs? How can this impact visitor experience?	
How will education and training affect the visitor experience?	
What improvement or development is necessary and what is the cost estimate? How will the cost be covered?	
What management strategy is required?	
Is research necessary? If so, what should be studied?	

Worksheet 4.18 Tourism Resources and Infrastructure: Information

List below all of the infrastructural resources and check the level of importance to tourism. Where VI = Very Important, I = Important, and NI = Not Important. In this way you can begin to see what needs improvement or development to meet the demands of tourism.

Infrastructural Resources	VI	I	NI
Directional Signs			
Information booths and visitor centres			
Brochures and other materials for visitors			
Guides and interpreters			

Worksheet 4.18.1 Assessment of Information Resource

Describe your assessment of the infrastructural resource in the table below.

Characteristic	Description
Are there adequate signs, information centres, printed materials, guides, and interpreters in the area?	
Is there a seasonal supply variation? What is it?	
What is the current infrastructure capacity? (e.g. how many signs, info centres, brochures, guides, etc. can the community handle?)	
What will infrastructure capacity requirements be as a result of tourism development? (e.g. total number of signs)	
Is the resource suitable for the visitor types and their needs?	
Visitor Expectations: what are they? what are their quality standards? How will they be met?	
Safety Factor: how will you ensure a safe visitor experience?	
Comfort of tourists: how will you ensure a comfortable visitor experience?	
What infrastructural improvement or development is necessary and what is the cost estimate?	
What management strategy is required?	
Is market research necessary? If so, what should be studied?	

Worksheet 4.19 Tourism Resources and Infrastructure: Political Resources

List below all of the infrastructural resources and check the level of importance to tourism. Where VI = Very Important, I = Important, and NI = Not Important. In this way you can begin to see what needs improvement or development to meet the demands of tourism.

Political Resources	VI	I	NI
Policies and programs supporting tourism			
Regulations impeding tourism			
Political attitudes and party platforms			

Worksheet 4.19.1 Assessment of Political Resources

Describe below your assessment of the infrastructural resource in the table below.

Characteristic	Description:
Is there adequate political support in the area?	
Visitor Expectations: what are they? how will they be met?	
What infrastructural improvement or development is necessary and what is the cost estimate?	
What management strategy is required?	
Is market research necessary? If so, what should be studied?	

Worksheet 4.20 Tourism Resources and Infrastructure: Shopping

Inventory Sheet

List below all of the infrastructural resources and check the level of importance to tourism. Where VI = Very Important, I = Important, and NI = Not Important. In this way you can begin to see what needs improvement or development to meet the demands of tourism.

Shopping Resources	VI	I	NI
Range of goods and services			
Authentic local arts and crafts			
Hours and days of operation			
Themes (shopping areas or merchandise)			

Worksheet 4.20.1 Assessment of Shopping Resource

Describe below your assessment of the infrastructural resource in the table below.

Characteristic	Description:
Are there adequate facilities in the area?	
Is there a seasonal supply variation?	
What is the type, quality, and price related to each market segment?	
What is the current infrastructure capacity? (e.g. number of customers)	
What will shopping capacity requirements be as a result of tourism development? (e.g. total number of customers)	
Is the resource suitable for the visitor types and their needs?	
Visitor Expectations: what are they? what are their quality standards? How will they be met?	
Safety Factor: how will you ensure a safe visitor experience?	
Comfort and convenience for tourists: how will you ensure a comfortable/convenient visitor experience?	
What infrastructural improvement or development is necessary and what is the cost estimate?	
What management strategy is required?	
Is market research necessary? If so, what should be studied?	

Worksheet 4.21 Tourism Resources and Infrastructure: Travel Services

Inventory Sheet

List below all of the infrastructural resources and check the level of importance to tourism. Where VI = Very Important, I = Important, and NI = Not Important. In this way you can begin to see what needs improvement or development to meet the demands of tourism.

Travel Services	VI	I	NI
Local tour or bus companies, car rental agencies			
Outfitters and equipment rentals			
Guides and interpreters			

Worksheet 4.21.1 Assessment of Travel Service Resource

Describe below your assessment of the infrastructural resource in the table below.

Characteristic	Description
Are there adequate services in the area?	
What is the seasonal supply variation?	
What is the type, quality, and price related to each visitor market segment?	
What is the current travel service capacity? (e.g. number of customers)	
What will infrastructure capacity requirements be as a result of tourism development? (e.g. total number of customers)	
Is the resource suitable for the visitor types and their needs?	
Visitor Expectations: what are they? what are their quality standards? How will they be met?	
Safety Factor: how will you ensure a safe visitor experience?	
Comfort for tourists: how will you ensure a comfortable visitor experience?	
What infrastructural improvement or development is necessary and what is the cost estimate?	
What management strategy is required?	
Is market research necessary? If so, what should be studied?	

Worksheet 4.22 Tourism Resources and Infrastructure: Water and Sewer

Inventory Sheet

List below all of the infrastructural resources and check the level of importance to tourism. Where VI = Very Important, I = Important, and NI = Not Important. In this way you can begin to see what needs improvement or development to meet the demands of tourism.

Water and Sewer Resources	VI	I	NI
Water Supply			
Sewer			
Drainage			
Solid Waste Management			
Air Quality			

Worksheet 4.22.1 Assessment of Infrastructural Resource

Describe below your assessment of the infrastructural resource in the table below.

Characteristic	Description
Are there adequate supplies in the area?	
What is the seasonal supply variation?	
What is the current infrastructure capacity? What volume of water can be handled by the system?	
What will infrastructure capacity requirements be as a result of tourism development?	
Visitor Expectations: what are they? what are their quality standards? how will they be met?	
Safety Factor: how will you ensure a safe visitor experience?	
What emergency water/sewer supply measures are in place?	
What are the environmental impacts of tourism development?	
What improvement or development is necessary and what is the cost estimate? How will the cost be covered?	
What management strategy is required?	
Is market research necessary? If so, what should be studied?	

Worksheet 8.1 Baseline Data, Indicators, And Measures for Aspects and Objectives

Issue/ objective	Criteria for evaluating issue	Indicator(s)	Measures for indicator	Baseline data

Worksheet 8.2 Monitoring Implementation

Action Step	Results (Measured)	Baseline Data	Management Response / Plan Adjustment Suggested
1.			
2.			
3.			

Worksheet A.1: Strengths, Weaknesses, Opportunities, Threats, Issues and Problems, (ranked in descending order of importance) for community tourism

Strengths 1. 2. 3. 4.	Weaknesses 1. 2. 3. 4.
Opportunities 1. 2. 3. 4.	Threats 1. 2. 3. 4.
Issues 1. 2. 3. 4.	Problems 1. 2. 3. 4.
Competitors 1. 2. 3. 4.	Competitive advantage relative to competitors 1. 2. 3. 4.

Worksheet A.2 Goals and Strategies

Note: You may need to create two worksheets - one for short-term and the other for long-term goals and strategies.

Issue/problem/opportunity (list with rank)	Short-term Goals	Rank of goals	Long-term goals	Rank of Goals
	Alternative scenarios for achieving goals		Alternative scenarios for achieving goals	
	Short-term strategies selected	Rank of short-term strategies	Long-term strategies selected	Rank of long-term strategies

Worksheet A.3 Short Term Goals

The condition of resources as rated on the Community Assessment forms combined with your community goals assessment will help to formulate resource goals and actions. Use this form to outline and prioritize short term goals for resource development.

[illegible]

Worksheet A.3 Long Term Goals

The condition of resources as rated on the Community Assessment forms combined with your community goals will help to formulate resource goals and actions. Use this form to outline and prioritize long term goals for resource development.

Resource	Goal	Action