



# COMMUNITY- BASED TOURISM

**PORTO BUSINESS SCHOOL**

JULY 2024

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# COMMUNITY- BASED TOURISM

TOURISM MANAGEMENT 18 EXECUTIVE MASTER

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# ABOUT

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## LET'S GROW OUR COMMUNITIES!



Within the ambit of the Executive Master in Tourism Management 18, at Porto Business School, it was proposed to develop a capstone project, whose purpose is to apply the knowledge acquired throughout the course.

Community-Based Tourism (CBT) represents a sustainable tourism approach that empowers local communities to actively manage and benefit from tourism activities in their neighborhoods. The final project seeks to address the multifaceted challenges inherent in CBT, focusing on creating a comprehensive toolkit and roadmap for its implementation.

Despite its potential, community tourism often encounters obstacles related to economic viability, environmental impact and community involvement. The main goal of this project is to develop a comprehensive model that consolidates the understanding of CBTs dynamics and identifies the essential components required for its creation and growth. This model will also outline the key impacts that should be monitored as CBT initiatives progress. By providing a toolkit to support the development of CBT, the project aims to help initiatives thrive, benefiting residents and tourists, empowering local communities and promoting a sense of ownership, achieving a sustainable development as well as generating revenue, revitalizing neighborhoods while preserving culture and authenticity.

# METHODOLOGY

To achieve the objectives of this project on Community-Based Tourism (CBT), several methodological steps were outlined. Initially, a comprehensive literature review was conducted, investigating existing CBT initiatives and real-world cases around the globe and their trends. A particular case focused on container architecture was presented to showcase a sustainable building solution. This analysis allowed for an understanding of the current state of CBT and the identification of sustainable practices that can be incorporated into the project.

Subsequently, the CBT Concept, Principles, and Triggers were developed for the project, along with its main benefits and challenges. Following the identification of stakeholders, the next step involved the development of a structured toolkit to guide stakeholders through the process of establishing a CBT project. This toolkit includes a detailed feasibility assessment with a roadmap for evaluating the project's viability.

To complement the development of the toolkit, interviews were conducted with the identified stakeholders. These interviews aimed to collect qualitative and quantitative data on their experiences and perspectives regarding CBT. Additionally, a survey was distributed in order to understand what it takes to create and develop a CBT and the main impacts that should be monitored as CBT thrives. The information obtained from the interviews and the survey was used to complete and refine the toolkit, ensuring that it was based on real-world experiences and needs.

This methodological approach ensured a deep understanding of the challenges and opportunities associated with CBT, enabling the creation of a practical and sustainable model that can be implemented in various communities.



# LITERATURE REVIEW

## Community-Based Tourism

A Community-Based Tourism (CBT) focuses on empowering sustainable communities by involving local people in preparing and providing authentic tourism experiences. Through skills development and improved economic self-sufficiency, communities can proudly preserve their culture, heritage, and environment. Current travel trends show a strong alignment with CBT, particularly for European tourists seeking immersive experiences that benefit the communities they visit while minimizing negative impacts of travel.

Regarding the Centre for the Promotion of Imports (CPI), “Community-Based Tourism (CBT) refers to tourism experiences that are owned, hosted and managed by local communities. Well-managed CBT creates jobs, generates income and safeguards the local environment. CBT also inspires CBT travelers and promotes cross-cultural understanding” (CPI, 2023).

The Center for the Promotion of Imports additionally mentions that CBT projects must be:

- **Authentic and hands-on:** experiences must be genuine and provide a real perception of the daily life of the community. They should not be artificial or staged, and should involve hands-on activities. Immersive experiences and community bonding are promoted through these activities.
- **Sustainable:** operations should follow sustainable principles and focus on visible, measurable, and transparent actions. Activities that help preserve the local environment are important for environmentally-conscious European CBT travelers.
- **Community-led:** owned and operated directly by the local community to ensure they receive direct financial benefits and are empowered to enhance their self-governance and long-term economic development. Collective responsibility is important to prevent benefits from being limited to a few individuals, which could lead to distrust and rivalry.
- **Provided by staff/members trained in tourism:** communities involved in CBT must have tourism training to provide suitable services to European CBT travelers effectively.

The World-Wide Fund for Nature (WWF) defines Community-Based Tourism as “a form of tourism where the local community has a substantial control over and involvement in its development and management; and a major proportion of the benefits remain within the community”.

# WHY ARE THEY BEING CREATED?

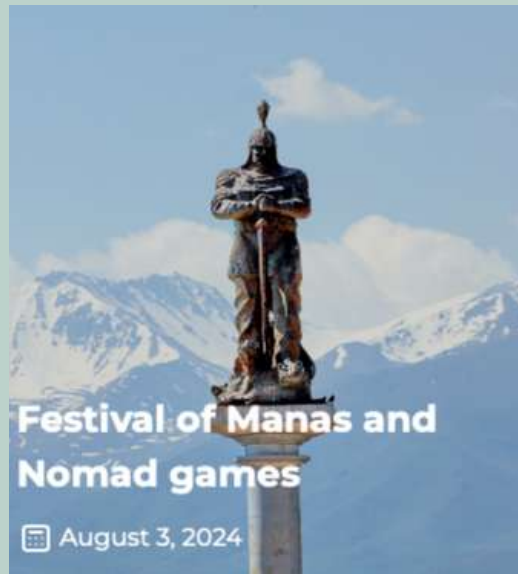
## Improve Life Conditions

### Community-Based Tourism (CBT) in Kyrgyzstan

The association was founded with the vision of making Kyrgyzstan a leader in sustainable community-based tourism in Central Asia, with a network of local CBT groups providing quality tourism services.

CBT is a public ownership and governance approach to tourism aimed at providing broader social, economic and environmental benefits. It is one of the sectors in Central Asia that has great potential to contribute to inclusive, sustainable rural growth and development.

Since its establishment, Hospitality Kyrgyzstan has been committed to promoting eco-friendly practices, conserving natural resources, respecting local cultures, and supporting rural development through tourism.



### **What is "Hospitality Kyrgyzstan"?**

Hospitality Kyrgyzstan is the Kyrgyz Community-Based Tourism Association (KCBTA), a pioneering force in promoting sustainable and community-driven tourism practices in Kyrgyzstan. It serves as an umbrella organization uniting 15 diverse destination communities, known as "CBT groups", aimed at improving living conditions in remote mountain regions through the development of sustainable ecotourism models.

### **Why was "Hospitality Kyrgyzstan" developed?**

The primary objective of Hospitality Kyrgyzstan is to improve living conditions in remote mountain regions by developing a sustainable and wholesome ecotourism model that utilizes local natural and recreational resources. It was developed in response to the need for sustainable tourism initiatives in Kyrgyzstan, recognizing the potential of tourism to bring economic opportunities to rural areas while preserving cultural and environmental heritage. In order to popularize ecotourism and more careful treatment of the environment, the KCBTA has developed their own sustainable tourism policy, an Ecological Code, or an Ecotourism Organizations' Codes of Conduct which is now an integral part of any agreements on cooperation signed between the KCBTA and partner organizations.

### **How was "Hospitality Kyrgyzstan" created and when was it established?**

Community-Based Tourism (CBT) was initiated in May 2000. For further development and coordination of the activities within the country, these groups have established their own umbrella organization, The Kyrgyz Community Based Tourism Association (KCBTA) – "Hospitality Kyrgyzstan" - which was established on January 3, 2003. It was formed through the collaboration of 17 actively working CBT groups across Kyrgyzstan with support from the Helvetas Kyrgyzstan Programme's Community-Based Tourism Support Project (CBT SP). This collaboration aimed to coordinate efforts, share best practices, and advocate for sustainable tourism development in Kyrgyzstan.

According to the World Tourism Organization (UNWTO), Community-Based Tourism is a powerful way for local communities to showcase their culture and heritage to visitors. Through the development of tourism activities and services by community members, often in collaboration with the private sector, unique and authentic experiences are created.

Regarding to National Geographic (2022), “CBT at its best goes way beyond employing locally. It means the community gets to decide how to protect the culture and environment on which it depends. So, the community benefits, the environment and local culture is safeguarded, and the resulting economic benefits stay within the community”.

One of the key benefits of community based tourism is the direct involvement of local people in sharing their knowledge and traditions with visitors. This fosters a sense of connection and understanding between visitors and the host community, creating a more meaningful and authentic travel experience.

Furthermore, Community-Based Tourism initiatives are often designed to support social and environmental initiatives within the community. By investing in local skills and distributing benefits throughout the community, CBT can have a positive impact on both the local economy and the environment.

By designing tourism programs based on elements of local life, culture, and nature that they are proud of, community members are able to offer visitors a genuine insight into their way of life. This not only enriches the visitor experience but also provides an opportunity for cultural exchange and learning.

Overall, while there may be subtle differences in the nuances of each definition of Community-Based Tourism, the core principles remain consistent.

The nuances in each definition of CBT emphasize the empowerment of local communities, the economic benefits for community members, and the promotion of cultural exchange and preservation. These differences reflect the diverse perspectives and priorities of different organizations and agencies involved in promoting and supporting Community-Based Tourism.

The focus is on empowering local communities to benefit economically from tourism, while also preserving their culture, heritage, and environment. The involvement of local community members in the development, management, and operations of tourism activities is emphasized, as well as the importance of authenticity, sustainability, and community-led initiatives. These elements are key in ensuring that Community-Based Tourism provides meaningful benefits to both visitors and the communities they visit, while also promoting cross-cultural understanding and sustainable development.

# WHY ARE THEY BEING CREATED?

## Economic Development



### Pop Brixton

#### What is Pop Brixton?

Pop Brixton is a market-style area built from recycled shipping containers, hosting small street food concessions and boutiques. It has a strong focus on community involvement and local job provision.

#### Why was Pop Brixton created?

Pop Brixton was created to provide a space for local businesses in Brixton, offering affordable rents and prioritizing businesses that benefit the local community by providing jobs and training.

#### How was Pop Brixton created?

Pop Brixton was developed by local architect Carl Turner in conjunction with developers The Collective. Lambeth Council provided free use of the land for the project.

#### When was Pop Brixton created?

Pop Brixton was founded as a “Meanwhile” project in partnership with Lambeth Council on the site of a disused ice-rink in 2015.

# Historical Evolution

The concept of Community-Based Tourism (CBT) has evolved over the years in response to changing societal values, tourism trends, and sustainability concerns.

Back to the 1970s and 1980s, examples of CBT initiatives focused on small-scale, locally-owned tourism enterprises, that aimed to benefit rural and marginalized communities, while in recent years, there has been increasing policy support and recognition for CBT at both national and international levels. Governments and multilateral organizations have introduced policies and initiatives to promote Community-Based Tourism as a means of fostering inclusive growth, poverty reduction, and sustainable development.

Furthermore, there has been an increase of stakeholder engagement in CBT initiatives. While early approaches often focused solely on the involvement of local communities, there is now a recognition of the importance of engaging multiple stakeholders, including governments, NGOs, tour operators, and academia, to create synergies and address complex challenges.

As concerns about environmental degradation, over-tourism and cultural gentrification grew there is a greater emphasis on sustainability, highlighting the importance of minimizing negative impacts of tourism on the environment and preserving cultural heritage within CBT initiatives.



Moreover the COVID-19 pandemic led to a shift in traveler preferences towards local and sustainable tourism experiences. Travelers became more conscious of their impact on destinations and sought out Community-Cased Tourism initiatives that offered authentic experiences while supporting local communities. As destinations navigated the challenges of recovery and rebuilding, there was an opportunity to reevaluate tourism development strategies and Community-Based Tourism initiatives were likely to play a key role in shaping the future of tourism towards more responsible and resilient practices, by leveraging local resources, networks, and community support to weather the challenges posed by travel restrictions and lockdowns. Overall, the pandemic has emphasized the importance of Community-Based Tourism as a sustainable and inclusive approach to tourism development.

Community-Based Tourism is increasingly recognized as a sustainable and resilient approach to tourism that prioritizes the well-being of local communities and the preservation of cultural and natural heritage.

Although Community-Based Tourism's main objective is to involve and benefit local communities, its implementation may vary depending on whether the area is more urban or rural, adapting to the specific characteristics and needs of each context.

There has been a growing emphasis on capacity building and empowerment within CBT initiatives, recognizing the need to equip communities with the skills, knowledge, and resources to participate effectively in tourism development. Capacity building efforts encompass training in hospitality, marketing, natural resource management, and entrepreneurship. Besides there is a growing recognition of the need for innovation and diversification, to cater to changing consumer preferences and differentiate destinations and initiatives.



# CTB's & Tourism Trends

With the constant growth and impact of the Travel & Tourism sector in the global economy, it is essential to understand how this industry can further enrich and support local communities. Through job creation, social progress, diversity and inclusion, and innovation, Travel & Tourism has the potential to act as a catalyst for positive change. This chapter explores how CTB's and current tourism trends can contribute to the overall development and well-being of communities worldwide.



# WHY ARE THEY BEING CREATED?

## Natural Catastrophe

### **Re:START Container Mall: A Case Study in Post-Disaster Recovery and Community Resilience**

In the aftermath of the 6.2 magnitude earthquake in Christchurch, New Zealand, on February 22nd, 2011, the city faced severe challenges, including loss of lives, extensive damage to buildings, and economic disruption. To revitalize the central business district (CBD) and support small businesses, an innovative solution was proposed: constructing a shipping container mall on the former Cashel Street pedestrian mall site.



### **What is Re:START?**

Re:START is a retail project launched in 2011 following the devastating earthquakes that hit Christchurch.

It involved the creation of a temporary shopping precinct made from shipping containers, housing various shops, cafes, and entertainment venues.

The project aimed to revitalize the city center, provide a vibrant retail space, and boost the morale of residents and visitors alike.

### **Why was Re:START developed?**

Re:START played a crucial role in revitalizing Christchurch's CBD following the earthquakes, injecting life and commerce into the area. According to data from the ReStart the Heart Trust, the project supported over 50 businesses, attracted more than 10,000 visitors during its opening festivities, and generated an estimated \$10 million in revenue annually. It provided a platform for small businesses to thrive, contributing to the local economy and job creation. Additionally, it served as a beacon of hope and resilience for residents and visitors, showcasing the community's determination to rebuild and recover.

From a tourism perspective, Re:START became a landmark attraction, drawing visitors interested in its innovative design and the city's resilience narrative.



### **How was Re:START created?**

61 Shipping containers were repurposed and arranged to create a pedestrian-friendly mall, offering a unique shopping experience.

Local businesses were given the opportunity to lease these container spaces at affordable rates, fostering entrepreneurship and community engagement.

Re:START became a hub for events, markets, and cultural activities, attracting both locals and tourists to the city center.

### **When was Re:START established?**

The project began in 2011, shortly after the earthquakes, on October 29th, the mall officially opened its doors to the public, and operated until 2018 when the area was redeveloped.

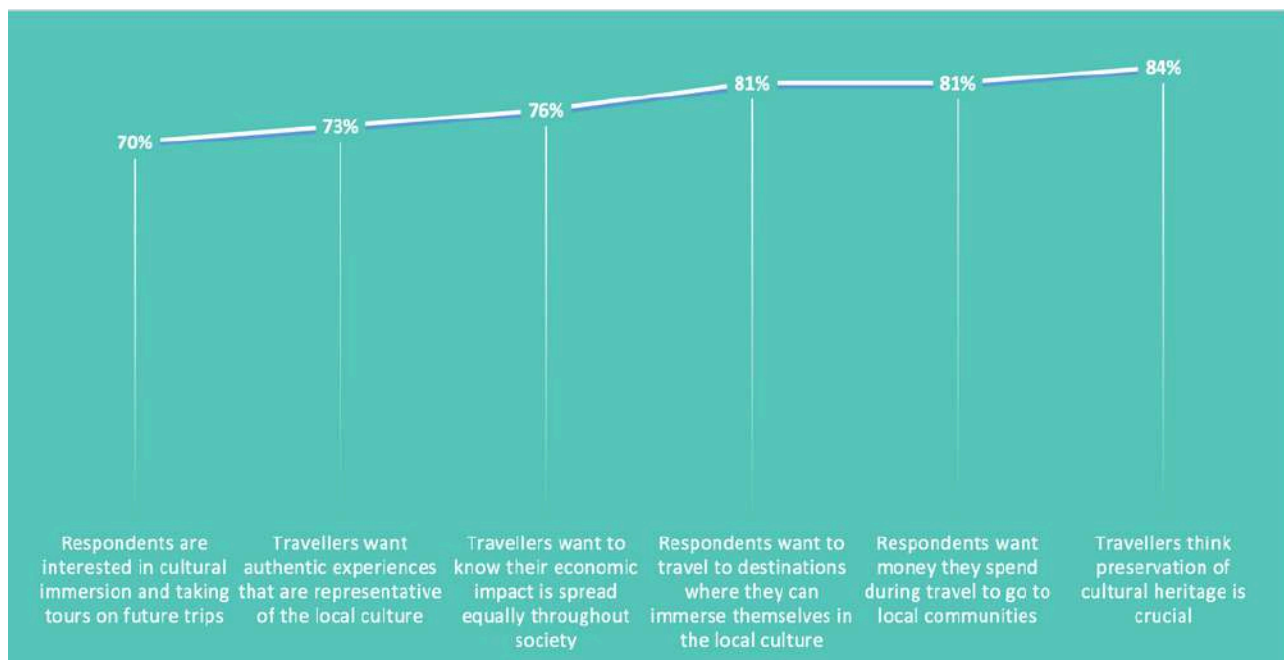
Its inception coincided with the city's reconstruction efforts, serving as both a short-term solution and a symbol of resilience during the recovery process.

Re:START's impact extended beyond economic revitalization. According to tourism data from Christchurch - NZ, the mall attracted approximately 2 million visitors annually, serving as a catalyst for tourism, drawing visitors from around the world intrigued by its novel design and the city's narrative of resilience and renewal. Furthermore, it inspired similar initiatives worldwide, showcasing the potential of community-based projects in post-disaster recovery and resilience-building.



Increasingly, tourists want to contribute to benefiting the community. According to an American Express poll last year, 72% of travellers want to help boost tourism revenue in local economies. And the latest sustainability report by Booking.com showed that 73% of travellers would like to have authentic experiences that are representative of the local culture; 84% believe that preservation of cultural heritage is crucial; and 76% want to be sure that their economic impact is spread equally throughout society (National Geographic, 2022).

Research conducted in 2022 by two top global companies, Booking.com and American Express, showed strong feelings in key source markets, such as Europe.



Source: [American Express 2022 Global Travel Trends Report](#) and [Booking.com Sustainable Travel Report 2022 \(PDF\)](#).

Industry travel leaders believe that responsible ecotourism is fast evolving into the standard. Tourists from Europe and worldwide are seeking genuine connections with local people and communities. There is a growing need for guarantees that travel is benefiting local communities.

Regarding to OECD Tourism Trends and Policies 2022, a recent Eurobarometer survey on attitudes of Europeans towards tourism highlighted that 82% of EU citizens expressed interest in supporting more sustainable tourism, for example, by consuming locally (55%), choosing environmentally friendly transport (36%), paying more to protect nature (35%) or to benefit the local community (33%) (European Commission, 2021). These findings are echoed by 2021 surveys from Booking.com and Skyscanner and the growing trend of 'flight shaming' which is representative of this shifting consumer sentiment.

Community-Based Tourism offers a unique and enriching experience for both visitors and host communities. By supporting local initiatives and sharing in the culture and traditions of the community, travelers can contribute to sustainable development while also gaining a deeper understanding of the places they visit.

Overall, CTB's play a crucial role in the tourism industry by promoting community development, cultural preservation, and sustainable practices. As tourists increasingly seek authentic experiences and ways to contribute to local economies, the importance of CTB's becomes more evident. By supporting these initiatives, travelers can make a positive impact on communities worldwide while also enriching their own travel experiences. It is through initiatives like CTB's that the tourism industry can continue to grow in a responsible and sustainable manner, benefiting both tourists and host communities alike.



# WHY ARE THEY BEING CREATED?

## Social Justice

### Cata Cultural Village

#### **What is Cata Cultural Village?**

Cata Cultural Village is a traditional Xhosa village located in the Eastern Cape province of South Africa. It is a community that has come together to preserve and showcase their culture, while also embracing development and progress.

While exploring Cata, travelers can connect with village families over meals, visit the shebeen with their host, join in a game of football with the local team, pick up some isiXhosa language skills, and delve into the arts, crafts, and culture of the Xhosa people. The tourist also has the chance to interact with everyday South Africans, discover their remarkable history, and hear about their ambitious future endeavors.

#### **Why was Cata Cultural Village created?**

Cata Cultural Village was created as a response to the forced removals and loss of traditional way of life during the apartheid era. The community of Cata sought compensation for their losses and signed a Restitution Settlement Agreement in 2000, with the goal of investing in their future development. The agreement meant that half of the value of dispossessed rights was paid to the individual families affected, and the other half was set aside for future development.

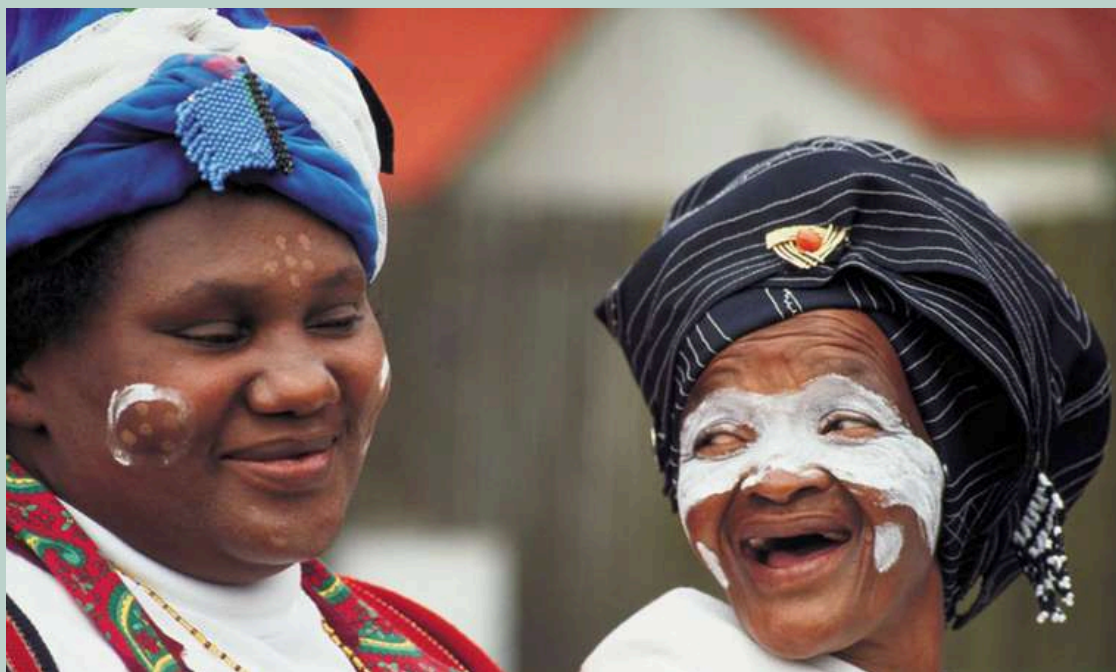


**How was Cata Cultural Village created?**

Cata Cultural Village was created through the determination and cooperation of the community members. They invested in infrastructure, agriculture, forestry, economic development, and land transfer, leading to the development of a thriving tourism industry that benefits the community. Cultural events and arts and crafts also play a significant role in showcasing the Xhosa culture.

**When was Cata Cultural Village established?**

Cata Cultural Village's journey began in the 1960s during the forced removals under apartheid, and continued with the signing of the Restitution Settlement Agreement in October 2000. Since then, the community has been working together to build a better future for themselves and their descendants.



# CONTAINER ARCHITECTURE: A SUSTAINABLE BUILDING SOLUTION

In our search for real cases that could illustrate examples of CBT's in several different locations, we were attentive to those who opted for creative and more sustainable solutions. Container architecture has proven to be an interesting option and we decided to investigate a little more, as an additional contribution to our project.

In an interview, Mark Sanderson discusses the viability of using shipping containers for constructing Community-Based Tourism (CBT) projects as a sustainable building solution. Drawing on his extensive experience in container development, Sanderson highlights key aspects such as structural soundness, aesthetics, sustainability, adaptability, and cost-effectiveness.

Mark Sanderson is an entrepreneur with 27 years of expertise in economic development, regeneration, and managing diverse projects. He has supported entrepreneurs, startups, and scaleups and has a rich background in managing university incubators. Renowned for his pioneering work in container development, Sanderson designed and operated SteelYard Kelham and created three additional sites for Steel Life container developments. His expertise is further recognized by his shortlisting to design and operate container projects for Leicester City Council and the City of Wolverhampton, both in the UK.

### **Structural Soundness**

Shipping containers are designed to be portable, weather-tight, structurally strong, and stackable. The load is distributed through the frame, reducing the need for extensive foundations, except at the corner castings. A standard ISO container can support up to 192,000 kg on the corner castings, allowing them to be stacked up to nine high. While containers can be used and stacked without modification, openings like doors or windows require additional reinforcement to maintain structural stability.

### **Aesthetics and Design: Visual Appeal and Adaptability**

Container architecture is both functional and flexible. It ranges from using the existing form and structure of the container to cladding it with traditional construction materials, making the container "building" resemble any conventional structure. The shape and design are limited only by imagination. Enhancing visual appeal can involve cladding with various materials, adding shapes and textures through additional structures like sloping roofs, curves, or glass extensions.

In this way, Additional shapes, materials, and structures can be added to the basic "box" shape to create unique or traditional features. Extensive use of glass and other materials or Stacking and joining containers at different angles can also create unique and appealing designs.

### **Sustainability: Environmental Benefits and Paradoxes**

Repurposing containers helps remove them from waste streams and reduces the need for energy-intensive recycling processes. Using containers for buildings can decrease the consumption of new construction materials and steel. However, there's a paradox in choosing between new and old containers. New containers are in better condition but using them contradicts the sustainability argument of repurposing end-of-life products. Old containers have a higher carbon footprint due to prolonged use, but their reuse is still considered sustainable and environmentally friendly.

### **Energy-Efficient Design Strategies**

Energy efficiencies can be achieved using traditional construction materials and technologies such as insulation, solar panels, low-voltage electrical systems, and energy-efficient appliances. Specific strategies include minimizing thermal transmission by reducing contact between steel container walls and internal fixtures, using closed-cell spray foam for insulation, and ensuring an air gap between the insulated container walls and the internal framed structure.

### **Adaptability and Flexibility: Ease of Modification and Expansion**

The modular nature of containers makes them highly adaptable. Internal alterations are straightforward, and the size of the space can be adjusted by adding or removing containers. This modular plug-and-play concept allows for easy repurposing and scalability. Challenges include site footprint limitations, budget for additional containers, and potential disruption during modifications, which can be minimized by offsite construction.

### **Cost Comparison: Cost-Effectiveness**

Shipping containers are cost-effective compared to traditional construction, both in terms of direct costs (materials) and indirect costs (labor and construction time). In the UK, traditional construction costs start at approximately £1,500 per square meter, while container park developments range from £380 to £500 per square meter. The primary factor reducing construction costs is the uniform steel frame of the container, which can be secured side by side or stacked to create multi-story buildings.

### **Conclusion**

Mark Sanderson's interview underscores that shipping containers are a viable and sustainable option for constructing CBTs. They offer flexibility, cost savings, and significant environmental benefits. Despite the challenges and sustainability considerations, the modularity and adaptability of containers make them an attractive choice for future developments.

# STELLYARD KELHAM (SYK)

## Regeneration of abandoned city areas for thriving a vibrant community

### What?

Mark Sanderson has created a thriving community focused on commercial success, well-being, diversity, and cohesion. This initiative encourages all groups to engage and participate in a social, interactive, safe, and family-friendly environment.

### Why?

The goal was to create a mixed-use community of businesses and to build a new vibrant day and night economy destination in Sheffield (UK). This was aimed at revitalizing a depressed area and fostering economic development through innovation and entrepreneurship.

### How?

SteelYard Kelham (SYK) was incorporated in September 2019 to build and operate a shipping container development on the site of a demolished steelworks in Sheffield. Within the first six months, 20 x 40ft shipping containers were purchased and converted into core and shell commercial spaces for startup and early-stage businesses. The project involved creating indoor and outdoor spaces to support a diverse range of business activities.

### When?

The initiative began in September 2019, with significant developments and business setups occurring within the first six months of operation.

### Impact & Projections

- Jobs Created/Safeguarded: 127 jobs (directly employed)
- New Businesses: 23 startups
- Relocated Businesses: 5 inward investments
- Average Visitors per Month: 6,500
- \* GVA direct (hospitality & leisure jobs): £3.42M
- \*\* hospitality multiplier: GVA £1.99M
- \*\*\* hospitality multiplier jobs: 60 jobs (indirectly – local economy)

Source:

ONS GVA data – U.K. Hospitality Report 2022

\*average GVA per hospitality job £26,959

\*\*hospitality GVA multiplier effect (indirect – local economy) x 1.58 times

\*\*\*hospitality job multiplier (indirect – local economy) x 1.47 times



# “OUR” CBT CONCEPT, PRINCIPLES AND TRIGGER

To support the development of the project under analysis, and considering various perspectives on CBT, we have consolidated the definition that will guide our project going forward.

*CBT represents a participatory and community-centered approach to tourism that seeks to maximize the positive impacts of tourism while minimizing its negative effects. By empowering local communities and fostering sustainable development, CBT aims to create tourism experiences that are mutually beneficial for tourists and host communities alike. At its core, CBT seeks to foster sustainable development by leveraging tourism as a tool for economic empowerment, local employment, cultural preservation, and environmental conservation.*

Based on the above definition, the CBT must follow the following principles:

1. Honor and preserve local identities, culture and traditions;
2. Involve and empower community participation in setting direction and decision-making;
3. Develop partnerships with relevant stakeholders;
4. Improve social well-being and quality of life;
5. Promote environmentally sustainable practices within the community.



Community-Based Tourism is a form of travel that promotes sustainable development within local communities while providing an authentic cultural experience for travelers.

CBT can significantly contribute to the economic development of local communities. By involving community members in the planning and operation of tourism activities, revenue generated from tourism can be more evenly distributed among the residents. This can lead to job creation, improved infrastructure, and a higher standard of living for the community as a whole.

Promoting tourism in outlying areas can help alleviate the overcrowding and congestion in the historical city center. By encouraging tourists to explore and stay in nearby communities, the pressure on the infrastructure and resources in the city center can be reduced. This can help preserve the cultural heritage of the historical sites and ensure a more enjoyable experience for both tourists and residents.

By involving local communities in the tourism industry and promoting travel to lesser-known areas, we can create a more sustainable and inclusive form of tourism that benefits everyone involved.



# Benefits & Challenges of CBT's

CBT is rewarding for visitors and strengthens relationships between hosts and visitors. It is essential for the entire community to be dedicated to organizing CBT in order to ensure benefits from tourism and address any negative impacts. The table below lists benefits and challenges communities must address.

Benefits of CBT	Challenges of CBT
<p><b>Economic development</b> Community-based tourism allows local communities to directly benefit from tourism activities, creating opportunities for employment and income generation.</p>	<p><b>Engaging the Local Community</b> Ensure that the community is actively involved in the planning and implementation of the tourism initiatives. This may involve overcoming language barriers, cultural differences, and engaging community members who may not initially see the benefits of tourism development.</p>
<p><b>Sustainable development</b> By diversifying tourism activities and spreading visitors to areas outside the historic center, community-based tourism helps to reduce the negative impacts of over-tourism on the local environment and infrastructure.</p>	<p><b>Sustainability and Conservation</b> Ensure that the tourism activities are sustainable and do not negatively impact the environment or the local cultural heritage. This may involve implementing responsible tourism practices, such as promoting low-impact tourism activities, conserving natural resources, and respecting local traditions and customs.</p>
<p><b>Cultural exchange</b> Community-based tourism offers visitors the opportunity to engage with local communities, learn about their traditional practices, and gain a deeper understanding of their way of life.</p>	<p><b>Marketing and Promotion Strategies</b> Effectively marketing and promoting the community-based tourism initiatives to attract visitors and generate income for the local community. This may involve developing partnerships with tour operators, travel agencies, and other tourism stakeholders, as well as leveraging digital marketing and social media to raise awareness about the unique experiences offered by the community-based tourism initiatives.</p>
<p><b>Empowerment of local communities</b> By involving local residents in the decision-making process and providing them with training and resources, community-based tourism helps to empower them to take control of their own development.</p>	
<p><b>Preservation of heritage</b> By promoting tourism in areas outside the historic center, community-based tourism helps to preserve and promote the cultural and natural heritage of the region.</p>	

# FEASIBILITY ASSESSMENT LIST

In this project, we explore the feasibility of implementing Community-Based Tourism (CBT) with the aim of consolidating best practices for its development. To this end, we present an initial feasibility assessment list, compiled based on our analysis of relevant literature, case studies, industry trends, and our own understanding of CBT.

This roadmap will guide us through the key drivers to consider when assessing the feasibility of such a project, including Location Assessment & Expansion Strategy, Stakeholder Alignment, Target Audience & Product Development, Sustainability & Balanced Growth, and Awareness & Adaptation to Trends.

Let's delve into each driver to understand its importance and impact on the success of the project.

## **Location Assessment & Expansion Strategy**

- Evaluate potential sites for the CBT project considering that is desirable to create new communities in consolidating or emerging areas of the city that help to disperse the tourist concentration of the historic areas;
- Consider accessibility, proximity to attractions (anchor assets), diversity of tourism attractions, and concentration of tourism assets and community preferences;
- Evaluate existing tourism offerings in the area;
- Fostering entrepreneurship and new business ventures.

## **Stakeholder Alignment:**

- Confirm alignment among stakeholders and address any conflicting interests;
- For communities' readiness analysis:
  - Gauge the community's willingness to participate in the project;
  - Assess existing community organizations, leadership, and engagement levels;

- For municipality strategies, policies and legal & regulatory review: confirm alignment with urbanization policies. Investigate local regulations and permits related to tourism and construction. Identify any legal constraints or requirements;
- Engage with existing local businesses and community groups to create effective working relationships, fostering a collaborative and open approach to the development of the CBT.

### **Target Audience & Product Development**

- Study tourist demand for the proposed experience;
- Develop products and services aligned with the needs of the target audience and with the community's offerings, taking into account their demographics, preferences, sustainable practices, etc.

### **Sustainability & Balanced Growth**

- Channel the offer of new products and services that are linked to concepts of sustainability;
- Articulate tourism activities with the quality of life of residents: The balance between the needs of residents and tourists;
- Dialogue with community members to find out their points of view. Ensure that the project is in keeping with local culture and values;
- Evaluate the economic & social impact.

### **Awareness & Adaptation to Trends**

- Research new trends, adapting to evolving tourist preferences;
- Take a people-centered approach to creating an inclusive and engaging space and community in order to reconnect disparate groups and communities, promote well-being and healthier living, and support meaningful social interaction;
- Promotion of Responsible Travel Behavior: Education of tourists about sustainable practices, such as reducing waste, conserving water, and respecting local customs. Encourage them to be mindful of their impact on the destination.

This list will be further developed after analyzing the results of interviews and surveys carried out within the scope of CBT's development.

# INSIGHTS FROM STAKEHOLDERS

As we embarked on the development of a comprehensive toolkit to assess the feasibility of Community-Based Tourism (CBT) projects, it was crucial to gather insights from key stakeholders involved in tourism development and management.

## Interviews

We have conducted a series of interviews with representatives from Turismo de Portugal, from NEST (Tourism Innovation Center, Portugal) and from two of the Porto Metropolitan Area Councils.

This investigation aims to provide a thorough understanding of the current landscape, best practices, metrics and indicators to evaluate the impact, resources, and programs to foster successful CBT initiatives as well as regulations and standards CBT projects must adhere to.

These interviews collectively emphasize the importance of integrating CBT principles into broader tourism strategies. By focusing on innovation, economic empowerment, flexibility, education, and collaboration, tourism can drive sustainable community development. Engaging local communities, supporting local businesses, and using data-driven strategies are essential for fostering a balanced and inclusive approach to tourism development.

The insights derived from these interviews were instrumental in shaping a robust and practical CBT feasibility toolkit. The following chapter present the main findings and analyses from our stakeholder interviews, providing a comprehensive foundation for the toolkit's development.

### **Innovation and Development**

Innovation emerged as a central theme across all interviews. The role of innovation as a catalyst for community development and entrepreneurship was emphasized. This viewpoint was echoed by different stakeholders who highlighted how innovative approaches enable communities to adapt to changing circumstances and leverage tourism as a tool for development. The focus on startups and community-based projects underscores the importance of fostering a culture of creativity and new business models within local communities.

### **Economic Empowerment**

Economic empowerment was another recurrent theme. Stakeholders emphasized the significance of initiatives that support local entrepreneurship and job creation. Some existent programs referred during the interview provide financial support for projects in low-density areas. These initiatives are crucial for ensuring that the economic benefits of tourism are distributed within the community, enhancing overall economic well-being.

### **Flexibility and Resilience**

The need for flexible and resilient business models was particularly highlighted in light of the COVID-19 pandemic. The ability to adapt quickly to new realities was seen as essential for the survival and growth of tourism-related businesses. This adaptability is crucial not only for weathering crises but also for sustaining long-term development and competitiveness in the tourism sector.

### **Importance of Education**

Education and empowerment are foundational to fostering a culture of innovation and entrepreneurship. Providing communities with the necessary skills and knowledge enables them to actively participate in and benefit from tourism development.

### **Collaboration**

Collaboration and resource-sharing are key to solving complex problems and enhancing the competitiveness of the tourism sector. Collaboration among different stakeholders, including government agencies, tourism organizations, and local communities, was deemed essential for addressing complex challenges and enhancing the sector's overall competitiveness. Working together, communities and stakeholders can achieve more effective and sustainable outcomes.

### **Community Involvement and Governance**

Involving local communities in tourism planning and decision-making processes is crucial. Listening to community members and ensuring that tourism revenues benefit them as much as possible leads to more sustainable and accepted tourism practices. Shared governance between municipalities and communities enhances the successful implementation of tourism strategies.

### **Strategic Planning and Sustainability**

Strategic planning and sustainability were also prominent themes. The stakeholders stressed the need for well-structured projects that integrate public and private efforts. They highlighted the importance of leadership, financial sustainability, and strategic partnerships in achieving successful and sustainable CBT projects. The use of economic, seasonal, and sustainable development indicators was mentioned as a critical tool for assessing the impact and effectiveness of these initiatives.

### **Managing Tourist Flows and Resident Engagement**

Effective management of tourist flows can prevent overcrowding in popular areas and distribute economic benefits more evenly. Engaging residents through local councils and public presentations ensures that tourism development aligns with community needs and preferences.

### **Economic Empowerment and Cultural Preservation**

Supporting local businesses, artisans, and entrepreneurs is critical for integrating them into the tourism framework. Training programs and visibility campaigns can help these businesses thrive. Targeted tourism, focusing on visitors with higher spending power and longer stays, maximizes economic benefits while avoiding the pitfalls of mass tourism.

### **Monitoring and Evaluation**

Utilizing data and economic observatories to monitor tourism indicators is essential for informed decision-making. Despite challenges with data delays, leveraging various sources helps guide sustainable tourism efforts. Collaboration with different organizations and sharing insights ensure comprehensive and aligned strategies.

## Survey

The survey results provide valuable insights into the development of Community-Based Tourism (CBT) and citizens' preferences. With balanced gender representation and diverse age groups, notably Generation X, the findings offer a comprehensive view of community perspectives.

The significant diversity among the 295 respondents from 14 countries underscores global interest in CBT. The predominant representation of Portuguese (70,2%) and Brazilian (22,4%) respondents, along with contributions from various other nations, enriches the analysis with varied perspectives and experiences, indicating that CBT interest spans beyond specific regions.

Respondents showed a strong preference for traditional food and cuisine, local community will, and natural resources and landscapes as key endogenous resources for establishing CBT.

Historical sites and architecture also emerged as critical factors, reflecting the community's desire to develop the tourism sector and strengthen ties between tourists and local communities. These findings align with trends towards more conscious and sustainable tourism, highlighting the importance of natural and cultural elements such as gastronomy and history.

Key aspects identified for CBT success include preserving local cultural traditions, community engagement and ownership, and balancing economic and social impacts. These priorities underscore the importance of community involvement and preserving historical sites while promoting conscious tourism that enhances residents' well-being and quality of life.

Significant impact indicators for CBT development—community well-being enhancement, promotion of local culture and traditions, and job creation—reinforce the focus on sustainable community development. The high acceptance of these indicators, except for "entrepreneurship encouragement," suggests strong consensus among respondents.

Lastly, the preference for local gastronomy, products from local producers, and cultural events as top amenities in CBT destinations highlights travelers' desire to connect deeply with local culture. This connection is facilitated through experiences involving local food, unique products, and cultural events, emphasizing their integral role in enhancing the CBT experience.

In conclusion, the survey provides a comprehensive understanding of key factors influencing CBT success. The emphasis on cultural preservation, community engagement, and sustainable development reflects the growing trend towards conscious tourism, offering a valuable framework for future CBT initiatives.

# FEASIBILITY ASSESSMENT LIST: THE OFFICIAL ONE

This feasibility assessment list is an evolution stemming from the detailed analysis of stakeholder interviews and survey results conducted during the initial phase of our Community-Based Tourism (CBT) project. This list aims to further refine and expand our understanding of key drivers that contribute to the successful implementation of CBT initiatives.

The comprehensive interviews with representatives from various tourism organizations, along with the insights gathered from a diverse survey pool, have highlighted several critical areas. The integration of qualitative and quantitative data from these sources has enabled us to develop a robust framework that addresses both the challenges and opportunities in CBT. We present this comprehensive list in the following sections.

## *1. Location Assessment & Expansion Strategy*

- **Site Selection:**

- **Tourism & Resident Balance:** Assess potential areas for CBT, focusing on balancing tourism with the needs of residents in diverse neighborhoods.
- **Access to Anchor Attractions:** Ensure sites have accessibility to anchor attractions and offer a diverse range of tourism activities.

- **Distribution Strategy:** Verify the need to develop strategies to distribute tourist activities in order to alleviate pressure on certain areas and stimulate economic growth in less visited areas.
- **Security Considerations:** Ensure that security measures are in place to attract tourists, focusing on areas perceived as safe and accessible.
- **Infrastructure Readiness & On-Going Projects:** Evaluate transportation, communication, and technological infrastructure to support CBT initiatives. Integrate ongoing infrastructure projects such as public transport improvements to enhance mobility and manage tourist flows.

- **Entrepreneurial Ecosystem:**

- **Tourism Framework:** Promote initiatives that support local artisans and all type of entrepreneurs, through integration into the tourism framework.
- **Funding Programs:** Leverage funding programs to support CBT projects that emphasize collaborative efforts and the use of territorial assets.
- Provide access to resources that help SMEs understand and capitalize on market trends.

## 2. Stakeholder Alignment & Governance

- **Community Engagement:**

- **Resident Involvement:** Engage communities through local councils and public consultations to ensure tourism strategies reflect community needs and inputs.
- **Economic Empowerment:** Support local businesses and artisans with training programs and visibility campaigns to help them thrive within the tourism sector. Ensure that revenues from tourism activities are allocated to benefit local communities directly.

- **Legal & Regulatory Review:**

- Ensure CBT projects align with municipal regulations and policies, especially those promoting balanced and sustainable tourism growth.
- Identify any legal constraints or permits required for tourism and business activities.

- **Collaboration Opportunities:**

- Foster partnerships with local businesses, government bodies, and community groups to create synergies and enhance project effectiveness.
- Involve stakeholders from all sectors including local tourism operators, restaurants, museums, and other relevant entities.
- Implement shared governance models between municipalities and communities to enhance the effectiveness of tourism strategies.
- Support from entities through the provision of diverse training and development of basic skills and promotion at national and international events.
- Promote funding programs focused on leveraging territorial assets and collaborative community efforts.
- Collaborate with various organizations to share data and insights, ensuring comprehensive and aligned tourism management strategies.

### 3. Target Audience & Strategic information

- **Market Demand:**

- Study the demand for new, innovative CBT experiences among different tourist demographics and interests.
- **Targeted Tourism:** Focus on attracting tourists who prefer extended stays and authentic experiences.
- Check existing tourism offerings and identify gaps that new businesses can fill.
- Develop products and services that reflect community values and preferences while appealing to tourists seeking unique and genuine experiences.
- Ensure offerings align with the preservation of cultural identity and authenticity.

- **Adaptation to Trends:**

- Research emerging trends in tourism, particularly those related to sustainable travel and digital engagement.
- Adapt CBT offerings to meet the evolving preferences and behaviors of tourists.

- **Case Studies and Best Practices**

- Learn from successful CBT projects to adopt best practices in governance and community engagement.

- **Tourism Listening Mechanisms & Indicators**

- Implement mechanisms for continuous feedback from communities, including surveys, public consultations, and direct engagement.
- Listen to tourists through surveys carried out at different contact points and adapt tourism strategies based on continuous feedback and data analysis.
- Collect indicators from accredited sources/ economic observatory to create strategies aligned with the demands of communities, tourists, visitors and potential tourists.

#### *4. Innovation Ecosystem & Product Development*

- **Innovation Ecosystem**

- Assess the presence of business incubators and accelerators that support new tourism ventures through training, mentoring and learning new technologies
- Encourages the dissemination of success stories to motivate new ventures and the mistakes to reduce the learning curve.

- **Innovation in Offerings**

- Identify opportunities for local startups that align with the community's tourism goals.
- Create collaborative initiatives to solve sector problems and increase competitiveness.
- Incorporate local innovations in product development to differentiate offerings and add unique value.
- Pilot new tourism products and new business models in collaboration with the community to refine them based on feedback.

### 5. Sustainability & Balanced Growth

- **Sustainability in three Perspectives:**

- Ensure that tourism activities generated promote and minimize environmental impact.
- Incorporate practices that balance tourism with residents' quality of life and cultural preservation.
- Ensure that tourism projects navigate beyond environmental sustainability and embrace the social and financial perspective as well.

- **Education and Awareness:**

- Promote education around sustainable tourism practices for both locals and tourists. Encourage practices that reduce waste, conserve resources, and support local economies.
- Foster community workshops to build local capacity for managing CBT initiatives effectively.
- Be aware of the impacts that developments in the tourism sector can generate on communities and take stock in advance to minimize these impacts.

### 6. Regulations and Standards for CBT Projects

- **Project Structuring:**

- Ensure CBT projects are well-structured and sustainable, avoiding isolated initiatives.
- Address community needs in planning, accessibility, and workers' rights.

- **Leadership and Capacity Building:**

- Develop skilled technical teams and strong leadership for the continuity and success of CBT projects.

- **Financial Sustainability:**

- Ensure that communities develop economic autonomy, avoiding the need for ongoing public financing, if applicable

# PERCEPTUAL MATRIX

Considering that the new Feasibility Assessment List, which emerged from the consolidation of the interviews conducted, has an extensive list of factors/criteria, it was found that there was a need to prioritize it. We believe that a more structured view of this prioritization can help both in the process of evaluating these criteria for the creation of new CBTs, as well as in the self-diagnosis of existing CBTs.

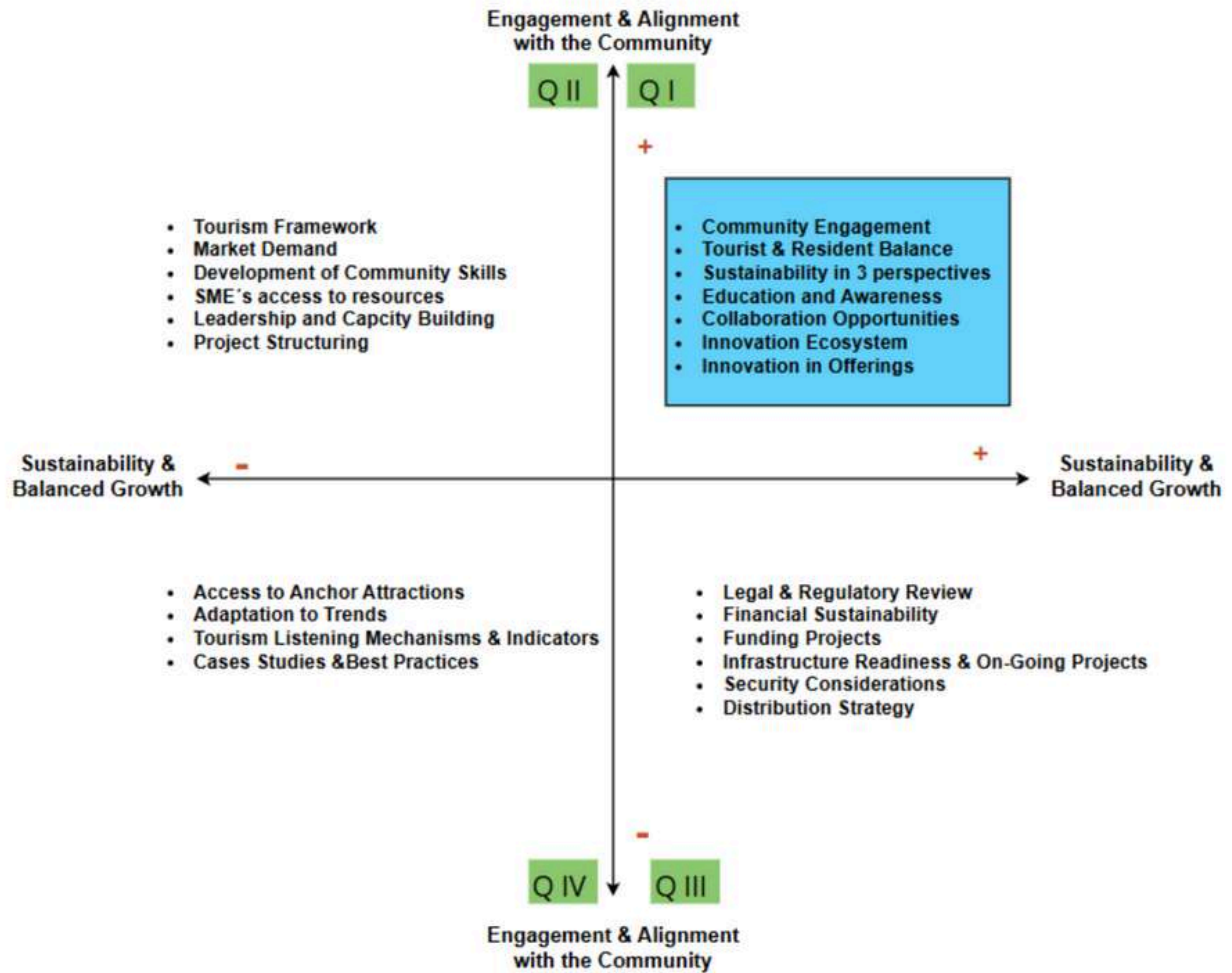
The tool chosen to demonstrate this prioritization of factors was the Perceptual Matrix. To this end, the two dimensions that, in our view, represent the core of the set of factors listed in the new Feasibility Assessment List were listed. They are:

## **1. Community Engagement & Alignment:**

This dimension encompasses all factors related to the active involvement of local communities, their needs, and the way in which tourism initiatives directly reflect and benefit the community. Community Engagement & Alignment refers to how CBT initiatives interact with the community, how they integrate local values, and how they support local economic and social development.

## **2. Sustainability & Balanced Growth:**

This dimension encompasses all the factors that influence the long-term sustainability of CBT initiatives, considering economic, environmental and social aspects. Sustainability & Balanced Growth refers to practices that ensure that tourism is viable, minimizing negative impacts and promoting a balance between tourism activity and the preservation of resources and quality of life of residents.



In this way, although all the factors in the Feasibility Assessment List are important, those that promote greater community engagement and sustainability should be prioritized in the creation of new CBTs. The other factors should be considered, but with a lower priority scale, to ensure that the new CBT projects are robust, integrated, and sustainable, reflecting the values and needs of the communities they intend to benefit.

# INDICATORS FOR CBT DEVELOPMENT: A COMPREHENSIVE FRAMEWORK

In this chapter, we focus on developing a robust framework of indicators that are influenced by Community-Based Tourism (CBT) development. These indicators serve as essential tools for monitoring the diverse contexts that CBT initiatives aim to address.

Our approach involves categorizing the indicators into distinct groups. We identified these indicators through an extensive review of relevant literature, conducted interviews with stakeholders, and comprehensive survey insights. By prioritizing these indicators based on respondents' perspectives, we aim to enhance the implementation of CBT initiatives and foster sustainable, positive outcomes for the communities involved.

## 1. Economic Impact:

- **Supply of tourism services:** increase in the number of establishments in the tourism industries by type, size, capacity, occupancy and spatial distribution; growth in diversity of tourism-related businesses;
- **Income Growth:** increase of revenue generated by tourism within the community;
- **Jobs Created:** number of direct and indirect jobs generated.
- **Tourism Revenue:** Total income generated from tourism activities.
- **Spending per Tourist:** Average expenditure per visitor.
- **Public Infrastructure & Services:** Amount of public investment spent in infrastructure (e.g. public transport, safety, waste management, guides to map and facilitate access to community, digital infrastructure – public Wi-Fi) that support the attraction of tourists to the local community. Improvements in accessibility and quality of tourism-related infrastructure.

### 2. Social and Cultural Impact:

- **Community Participation:** Level of active involvement of residents in tourism activities. Participation rates in community meetings, workshops and decision-making processes related to tourism development;
- **Cultural Preservation:** Maintenance and promotion of local traditions and heritage; Number of initiatives aimed at preserving cultural sites and practises.
- **Quality of Life:** Improvements in resident's quality of life including health, mental wellness, physical activity and work-life balance; Residents' perceptions of tourism's impact on their well-being.
- **Education and skill development:** availability and attendance of informative workshops on trends in the tourism sector, entrepreneurship and innovation, business management, and cultural heritage. Increase in local educational and training opportunities related to tourism.
- **Population Retention:** Changes in local population, particularly the retention of young people in the community.
- **Cultural Events:** Number, frequency and popularity of cultural events and festivals. Impact of cultural events on local and tourist engagement.
- **Authenticity:** Tourist perceptions of the authenticity of their experiences.
- **Cultural Exchange:** Opportunities for meaningful cultural exchange between tourists and local residents. Programs promoting interaction and understanding between visitors and the community.

### 3. Tourist Satisfaction & Awareness:

- **Visitor-Resident Ratio:** Number of visitors relative to the number of residents; Measures to prevent overcrowding and manage congestion.
- **Feedback & Reviews:** collection and analysis of visitors feedback and reviews; Satisfaction ratings and key areas for improvement.
- **Return Rate:** Percentage of tourists who return to the community.
- **Brand Recognition:** Awareness and recognition of the community as a tourism destination.

### 4. Involvement of Local Business:

- **Profit Sharing:** Evaluation of the success of local businesses;
- **Collaboration with local initiatives:** Number and quality of partnerships between public, private, and community sectors. Joint ventures and cooperative projects involving local businesses and tourism initiatives.

## 5. Environmental Impact:

- **Sustainability practices:** Implementation of practices to preserve green areas and natural resources. Reduction of plastic usage and waste management systems. Adoption of circular economy principles in tourism operations.
- **Responsible Travel Behavior:** Initiatives to encourage tourists to reduce waste, conserve water, and respect local customs.

## 6. Governance and Management Indicators:

- **Regulatory Compliance:** Adherence to local, regional, and national tourism regulations and standards. Implementation of policies to ensure sustainable tourism development.
- **Leadership and Governance:** Effectiveness of local leadership and governance structures in managing CBT projects. Transparency and accountability in decision-making processes.
- **Financial Sustainability:** Long-term financial viability and self-sufficiency of CBT projects. Availability of funding and financial support for ongoing and future initiatives.



# CONCLUSION

In conclusion, the development and implementation of Community-Based Tourism (CBT) offer a transformative approach to fostering sustainable and inclusive tourism. This capstone project has highlighted the essential elements and strategic considerations necessary for the success of CBT initiatives. By focusing on local empowerment, cultural preservation, and environmental sustainability, CBT can significantly contribute to the socio-economic development of communities while providing enriching experiences for tourists.

The findings underscore the importance of engaging local communities in every stage of the tourism development process, ensuring their active participation and benefit. This engagement not only enhances the authenticity of the tourist experience but also promotes a sense of ownership and pride among residents. Furthermore, the integration of innovative practices and the support for local entrepreneurship are crucial for adapting to changing market dynamics and enhancing the resilience of tourism ventures.

The survey results and interviews conducted during this project have provided valuable insights into the factors influencing CBT success. The emphasis on preserving cultural traditions, promoting community engagement, and balancing economic and social impacts aligns with the broader goals of sustainable tourism. These insights form a solid foundation for developing practical toolkits and frameworks that can guide future CBT projects.

This project has benefited greatly from the involvement of key stakeholders, whose insights and contributions have shaped our understanding and approach to CBT. However, it is essential to recognize the potential for expanding the scope of stakeholder engagement. In the future, it will be essential to involve a broader range of stakeholders and expand the initiative to a national or even international scale. Such expansion will enhance the applicability and impact of CBT, ensuring its benefits reach more communities globally. The inclusion of new stakeholders will allow for a more holistic and collaborative approach, extending the reach and effectiveness of CBT initiatives.

Moreover, one of the goals is to bring the concept of CBT to the forefront of the tourism agenda, promoting greater awareness and understanding. Currently, there is a varied understanding and governance of CBT that is not yet widely recognized. By promoting the concept and educating different stakeholders, we hope to help various CBT initiatives identify themselves as part of a cohesive movement. This recognition can contribute to the establishment of CBT "brands," aiding in their promotion and development.

CBT represents a promising pathway for achieving sustainable tourism development. It requires a concerted effort from all stakeholders, including local communities, government bodies, and private enterprises, to create a harmonious and beneficial tourism ecosystem. By leveraging the principles of CBT and fostering broader stakeholder engagement, vibrant and resilient communities can be built and thrive through tourism while preserving their unique cultural and natural heritage. We sincerely hope our work can contribute to CBT initiatives becomes widely recognized and understood, thereby amplifying its positive impact, and helping communities realize the full potential of sustainable tourism.

# APPENDIX

1. Analysis of the Interview with a Member from NEST;
2. Analysis of the Interview with a Member from Turismo de Portugal;
3. Analysis of the Interview with a Member from the Porto Metropolitan Area Council I;
4. Analysis of the Interview with a Member from the Porto Metropolitan Area Council II;
5. Understanding Community-Based Tourism Development: Insights from a Survey.

# STAKEHOLDERS PERSPECTIVES

## 1. Analysis of the Interview with a Member from NEST

In order to understand the importance of innovation in CBTs, we had the opportunity to interview a member of NEST.

NEST - Tourism Innovation Center, is the anchor project of the Tourism 4.0 initiative, aimed at positioning Portugal as a global hub for innovation in tourism. Its mission is to promote innovation and the use of technology in the tourism value chain, supporting the development of new business ideas, project experimentation, and the empowerment of companies in the transition to the digital economy.

### IN SHORT...

- Innovation and Development: Innovation is seen as a driver for community development and entrepreneurship.
- Economic Empowerment: Initiatives such as startups and community work are crucial for local economic development.
- Flexibility and Resilience: Companies with agile business models are better able to adapt to changes, as demonstrated during the Covid-19 pandemic.
- Importance of Education: Education and empowerment are fundamental to promoting a culture of innovation and entrepreneurship.
- Collaboration: Working together and sharing resources is essential for solving complex problems and increasing the competitiveness of the tourism sector.

### **Alignment between NEST and CBT**

The interviewee sees a natural connection between NEST's mission and the principles of CBT. It was emphasized that the innovation promoted by NEST inevitably leads to the development of new business models and entrepreneurship within communities. In this way, transformation and response to local needs are seen as opportunities for developing independent businesses, reflecting a growing trend of startups and community work that promote community development. Furthermore, the interviewee observes that countries with high levels of community development have support infrastructure, such as incubators and accelerators, which encourage entrepreneurship and innovation. It was mentioned that the Covid-19 pandemic highlighted the ability of companies with flexible business models to quickly adapt to new realities, a crucial aspect for the sustainable development promoted by CBT.

### **Entrepreneurship and Creation of New Businesses**

In order to leverage entrepreneurship and the creation of new businesses within communities, the interviewed identifies four key elements:

- **Culture of Innovation:** It is essential to create a cultural foundation that views innovation as a tool for economic development and response to market needs.
- **Empowerment:** Communities need to develop the skills and competencies necessary to implement and sustain innovations.
- **Piloting:** Practical experimentation is crucial to understand and adjust new approaches and solutions.
- **Collaboration:** Working together and sharing efforts is essential to solving major industry problems and increasing competitiveness in a healthy manner.

### **Tools and Support for Community Development**

The interview also addresses self-diagnosis tools developed by NEST, such as T+, which help small and medium-sized enterprises (SMEs) assess their sustainability and innovation without the need for large investments in consulting. These standardized tools are essential for enabling SMEs to better understand new market trends and opportunities.

In conclusion, the interview reinforces the importance of an ecosystem that promotes innovation, entrepreneurship and collaboration for the sustainable development of communities through tourism. The alignment between NEST's mission and the principles of CBT is clear, both seeking to transform tourism into a powerful tool for economic and social development, benefiting both tourists and host communities.

## 2. Analysis of the Interview with a Member from Turismo de Portugal

Turismo de Portugal (TP), as the National Tourism Authority responsible for promoting, enhancing, and ensuring the sustainability of tourism activities, merges all institutional competences related to tourism development, from supply to demand. Its mission is to promote Portugal as a tourist destination, support the development of tourism infrastructure and investment in the sector, and foster human resource training.

Given the commitment to strengthening tourism as a key driver of the Portuguese economy, this interview aims to gather insights for the development of a toolkit, covering relevant topics on the development and sustainability of community-based tourism (CBT) projects and how they align with Portugal's long-term tourism strategies.

### IN SHORT...

- **Alignment with Tourism Strategy:** CBT aligns with long-term goals of authenticity, sustainability, stakeholder inclusion, and community development.
- **Support and Funding:** Programs like Linha Turismo + Interior and PROVER supports projects in low-density areas and community networks. NEST fosters Tourism Innovation.
- **Capacity Building:** TP emphasizes training for local stakeholders to enhance tourism skills and dynamics.
- **Metrics and Indicators:** Use of economic, seasonality, and sustainable development indicators to assess CBT impacts.
- **Regulations and Standards:** Importance of well-structured projects, public-private integration, leadership, financial sustainability, and strategic partnerships.
- **Success Stories:** Examples like "Best Village of the World" and "Rota Histórica das Linhas de Torres" demonstrate effective, sustainable CBT initiatives.

### **Alignment of CBT Definition with the Tourism Strategy 2027 (or its successor)**

According to the interviewee, the proposed definition of CBT aligns with the long-term vision outlined in the Tourism Strategy, focusing on authenticity, the various pillars of sustainability, the inclusion of different stakeholders (such as companies, artisans, and territory managers), and community development.

It was explained that at TP, product structuring always begins with the territory, working intensively with municipalities, which manage cultural facilities and their territories. They have developed financial support lines to help territories improve their visitation conditions and created dynamics of interaction and sharing to build networks of offerings and provide critical mass to the territories. It was also emphasized the importance of gaining some scale, which implies networked work between municipalities, in a supramunicipal and regional logic.

Although TP's primary mission is to support companies, it has long had funding lines for public projects of tourist interest, non-business projects aimed at territory capacity building, which ultimately benefits companies as well. They have also promoted capacity building and training for non-profit associations, municipal technicians, regional entity technicians, etc., to acquire skills more directly associated with tourism dynamics.

This approach ensures that the benefits of tourism are redistributed to local communities, providing significant economic returns, and keeping value within the territories, strengthening cultural identity and territorial authenticity.

The Tourism Strategy emphasizes sustainable tourism, promoting active participation of local communities, reflecting the need for close collaboration between tourism companies and communities, creating a tourism offer that values local and cultural resources. The interviewee identifies as a challenge the need for communities to have a positive perception of visitors seeking authentic and traditional experiences.

### Resources and Programs Available to Foster Entrepreneurship

The interviewee explained that, in terms of funding, both at the scale of TP, which manages EU funds and its own funds, and at the regional scale, notably in regional programs managed by CCDRs, there is a concern to design funding programs focused on territorial assets and networked work involving communities. It was identified several initiatives and support lines available to foster entrepreneurship and new projects in communities, highlighting:

- ***Linha Turismo + Interior***: Focused on supporting projects in low-density areas, favoring those working in networks and promoting thematic offerings.
- ***NEST (Tourism Innovation Center)***: Supports entrepreneurship and innovation in the tourism sector, offering support to startups and the development of new business ideas.
- ***Programas regionais (PROVER)***: Managed by the Regional Coordination and Development Commissions (CCDRs), these programs support regionally funded network projects with an underlying public and private dimension, such as Rede das Aldeias Históricas and Aldeias do Xisto. They are territorially based programs focused on community capacity building, attracting private investment, and not only tourism development but also economic activation of the territories, attracting investors and residents.
- ***Academia Digital***: Initiatives to train and provide skills directly associated with tourism dynamics.

### Metrics and Indicators to Evaluate Economic and Social Impact

TP uses a series of metrics and indicators to evaluate the economic and social impact of CBT projects:

- **General economic indicators**: Including metrics such as the number of overnight stays, revenue generated, and REVPAR (Revenue per Available Room).
- **Seasonality indicators**: Evaluating the distribution of visits throughout the year, contributing to a more detailed analysis of tourist flows.
- **Sustainable development indicators**: Involving community satisfaction and diversification of tourist flows, following guidelines from the World Tourism Organization (UNWTO), offering a more qualitative view of tourism impacts.

### Regulations and Standards for CBT Projects

For CBT projects to ensure sustainability and long-term viability, certain aspects must be considered:

- Structuring and consistency: Projects should be well-structured, avoiding isolated initiatives, and ensuring permanence. There must also be an effective response to community needs in terms of planning, accessibility, and workers' rights.
- Public-private integration: Effective coordination between public and private entities is essential, leveraging each sector's competencies to maximize results.
- Capacity building and leadership: Projects should have skilled technical teams and strong leadership to ensure continuity and success.
- Financial sustainability: It's important for projects to develop self-financing mechanisms and not rely solely on continuous public funding.
- Strategic partnerships: Identifying partners with specific skills that can contribute to the project's success, such as tourism promotion agencies.

### Case Studies of Successful CBT Initiatives

The interviewee highlighted two examples of successful CBT initiatives:

- Best Village of the World: A competition organized by UNWTO that identifies villages with a strong identity and sustainability dynamic, serving as a model of best practices.
- Rota Histórica das Linhas de Torres: A structured project that revitalized historical heritage from the Napoleonic invasions, involving heritage restoration, creation of interpretation centers, and engaging companies to develop tourism offerings. This example demonstrates effective governance and a tourism development model based on local historical heritage.

### Final Reflection

The interview provides insight into Turismo de Portugal's approach, emphasizing the importance of sustainability, public-private collaboration, community capacity building, and the valorization of local resources. It highlights the need to promote tourism that not only attracts visitors but also strengthens local economies and preserves cultural authenticity.

The interviewee stresses that the success of CBT depends on solid structuring, consistency in initiatives, effective integration between public and private sectors, and the ability to self-finance projects. She cited practical examples of success, such as the "Best Village of the World" initiative and the "Rota Histórica das Linhas de Torres," illustrating the effectiveness of well-planned and sustainable projects involving collaborative governance and focusing on the valorization of historical and cultural heritage.

## 3. Analysis of the Interview with a Member from the Porto Metropolitan Area Council I

The interview was conducted with Member of the Porto Metropolitan Area Council. Among the various responsibilities of the department are the implementation of tourism development strategies and actions and the promotion of the city as a destination at regional, national, and international levels. The objective of this interview was to understand and verify the alignment of the department's actions with the development of the TCCs, the main focus of this project.

### IN SHORT...

- The importance of involving the various communities in the municipality is their attentive listening and involvement and the concern that revenues generated from tourism activities are allocated to communities as much as possible;
- The development of a tourism strategy that listens to all stakeholders involve each sector in its row and understand the individual ambitions of each sector and intertwine/involve all interests and needs;
- The importance of understanding the impacts that developments in the tourism sector generate on communities and of always taking stock to minimize impacts;
- The importance of shared governance between the municipality and communities for the successful implementation of strategies;
- Tourism projects must navigate the various aspects of sustainability: financial, social and environmental;
- Listening to tourists through various surveys carried out at various contact points: tourist offices, fairs, national and international events, interactive stores and through local tour operators;

Indicators vary according to what you want to monitor and vary according to the size of the events: through surveys the results are consolidated, and indicators are fed. Some strategic actions such as the creation of an Observatory and Big Data technology will refine the level of information already achieved by the Chamber and consequently the impact on strategies for the development of tourism and local communities that prosper from it.

### Community Tourism Concept: Involvement and Creation of Communities Linked to Tourism

#### Involvement and Creation of Communities Linked to Tourism:

The importance of involving various communities within the municipality with touristic characteristics lies in attentive listening and their engagement. There is a concern to allocate the revenues generated by tourism activities to the communities, utilizing human, cultural, natural, and historical heritage. The tourism strategy must listen to all stakeholders, such as local tourism operators, the local economy, restaurants, museums, industry, the port, and others, to intertwine the interests and needs of each sector.

#### Impacts of Tourism on Communities

Understanding the impacts of tourism is essential. An indicator shows that 95% of the this community does not consider tourism invasive, despite the pressure on shared services during the bathing season. The goal is always to minimize the negative impacts of tourism on the communities.

#### Attractive Endogenous Factors for the Creation of TCCs

To address this topic, some tourism products developed from the sea economy were used as examples:

1. Water Sports: Surfing, with tens of thousands of participants, not only stands out as a tourism product but also as an investment attraction vector, drawing people to live in this city due to the lifestyle it offers.
2. Gastronomy: The city has over 450 restaurants, a fishing port, and municipal markets selling fish. This factor is a significant draw for tourists seeking authentic gastronomic experiences.
3. Municipal Market: The market stands out for preserving tradition, where 80-year-old women still sell fish as they have always done. Visitors can buy fresh fish and have it grilled at one of the market's restaurants. Maintaining this essence directly contributes to the permanence of horticultural and fishing operators, as well as supporting the business incubator installed on-site.

### Development of the Fishing Community

Among the tourism products, the fishing sector stood out, exemplified by the development of a fishing community. The fishing sector has attracted significant tourist interest, as evidenced by surveys at tourism offices, international fairs, and the Camino de Santiago.

This community is not yet fully prepared for tourism, which is why several actions were implemented:

- Training Programs:
  - These involve issues related to marine litter, material recycling, and infrastructure creation. Since the beach is used for activities, it needs to be kept clean and attractive, developing basic skills to build tourism products.
- Maintenance and Cleaning:
  - Support goes beyond training, including proper material storage and awareness of the importance of keeping the area clean and beautiful.
- Insurance and Pricing:
  - Focus on boat insurance policies and the correct pricing of tourism experiences, along with testing tourist acceptance.
- Funded Projects:
  - Funding was secured for a small project offering boat tours to tourists. The City Council works to position this product in the market as a genuine and unique experience, justifying a higher price.

### Market Strategies and Training

- Local Market Demand:
  - Surveys show a growing interest in local markets. Tourists seek information about fairs beyond fish markets, resulting in joint actions with partners involving vendors of vegetables, fruits, and clothing.
- English Language Training:
  - English language training is in its second edition, aiming to improve communication with foreign tourists.
- Investment in Tourism Framework:
  - The City Council is investing in the promotion of fairs and weekend markets through the creation of flyers and videos for international fairs.

The interviewee says they are not interested in scale, but in positioning. Working with other communities through training and mentoring is essential, challenging them to explore new business components. The pursuit of sustainable and authentic tourism, combined with local economic development, strengthens the city' image as an attractive and differentiated tourist destination.

### Listening to the Communities: How?

Listening to the various communities in this city is generally done through the Associations that represent them.

In addition to collaborating with associations, it is up to the City Council to identify and involve important elements that may not be formally represented, ensuring the inclusion of all impacted by the projects. This knowledge is crucial for implementing effective community initiatives and ensuring they benefit the community.

Projects should aim not only for financial sustainability but also environmental and social sustainability, promoting a virtuous functioning for community development.

### Tourism Listening Mechanisms

- **Communication Channels:** The City Council uses various channels, including international fairs and events, to conduct surveys addressing motivations, knowledge, brand awareness of this city as a destination, and other relevant aspects. They know in advance the audience they want to reach and always maintain a minimum proportion of surveys to be collected from these events.
- **Tourism Product Activation:** They take advantage of these opportunities to promote tourism products of interest, such as fish preserves, surfing, nature, and others. Annually, they hold about 30 international events to strategically promote this city.
- **Semi-annual Questionnaires:** Semi-annually, they conduct questionnaires with all local tourism operators to assess performance, identify positive and negative points, and understand the changes that have occurred. Regardless of the support budget applied, they always generate impact reports, allowing continuous and detailed evaluation of the results.

Thus, council's strategy for tourism development is based on shared governance, active listening to communities, and sustainable promotion. This integrated model ensures that projects broadly benefit the community and position of this city as a standout tourist destination.

### Monitored Impact Indicators

The monitored indicators vary depending on the event, whether it is proprietary or supported, due to different scales. One example of an indicator is the number of overnight stays. As this city has limited hotel offerings compared to its demand, monitoring this indicator is simplified. Other indicators include the impact on the local economy, restaurant performance, the number of visitors or participants in events, and so on.

### Environmental and Sociocultural Indicators

Other monitored impact indicators are environmental, especially in areas like beaches, where noise levels, pollution, and resource consumption are measured. Sociocultural indicators, which are more complex to measure, assess the impact of events on the community and their perception.

### Monitoring Tools

Currently, they use an application that compiles all the data collected in museums, tourism offices, and other tourist sites, along with survey results conducted with tourists, related sectors, visitors, and potential international tourists.

An example of continuous monitoring is related to the Camino de Santiago, which has seen significant growth. In 2024, there was a 25% increase in the number of pilgrims, reflected in the increased number of services provided at tourism offices. Surveys are conducted at city tourism offices and the interactive Santiago store to evaluate the pilgrims' experience in this city compared to other routes. There is already a hostel for pilgrims, and the City Council is building accommodation on the first floor of the Municipal Market that will serve both surfers and pilgrims.

### Community Adaptation

With the growing demand, many collateral products and services are being developed to generate valuable revenue for the community. For example, restaurants are adapting their menus to cater to pilgrims, and local operators are adjusting to new demands, such as the highly sought-after backpack transport service by American tourists.

All mentioned actions are based on the application of surveys and analysis of the results. Currently, the City Council is working with a service provider to create a Big Data technology-based Observatory by the end of 2024. This Observatory will allow more detailed monitoring, such as measuring the number of people on the beach on a hot day, further enhancing the accuracy of impact data.

### The interviewed as a Tourist: What Matters Most

"I think all tourists have different motivations. Perhaps after COVID-19, there is a great need for people to interact with local communities, rather than just consuming tourism itself. People are really looking for genuine experiences with communities." - Interviewed 3.

The interviewee enjoys traveling, organizing her own trips, and thoroughly researching the destination. She appreciates getting to know places over time, beyond just the obvious attractions, mentioning the following factors in choosing a tourist destination:

- **Safety:** Safety is an important factor for the interviewed when choosing tourist destinations. She believes in the importance of the image of safe destinations as a motivator and attractor for people.
- **Connection with the Territory and Experiences:** The interviewed values feeling good in the places she visits, perceiving each trip as an experience that contributes to her personal development. She seeks not to harm the visited territories but to contribute positively to them. She is willing to pay a little more, understanding that this benefits the host community's development.

### Final Reflection

This City Council, through its Department of Tourism and Internationalization, has been working for the sustainable development of tourism, valuing the city's human, natural, cultural, and historical heritage. Shared governance with local communities is essential for the success of the strategies and actions implemented, always with the concern of minimizing the negative impacts of tourism.

# 4. Analysis of the Interview with a Member from the Porto Metropolitan Area Council II

The interview centers on the integration of Community-Based Tourism (CBT) principles into a broader tourism strategy. The discussion aims to explore how current initiatives align with CBT goals, focusing on sustainable tourism, community engagement, and economic development.

## **Community-Based Tourism (CBT) in an Urban Context:**

- **Adaptation of CBT:** The interviewee discusses the adaptability of CBT principles to urban settings, highlighting that cities, composed of various communities, can benefit from these principles to balance the needs of residents and tourists.
- **Strategic Planning:** Emphasis is placed on strategic planning for sustainability, with specific projects designed to engage residents and promote a variety of activities that align with CBT principles.

## **Managing Tourist Flows and Resident Engagement:**

- **Distribution of Tourist Flows:** To mitigate pressure on key historic areas, a strategy is implemented to distribute tourist activities across different parts of the city. This aims to increase the average stay of visitors and stimulate economic growth in less visited areas.
- **Community Involvement:** The importance of involving local communities is stressed, with efforts to engage residents through local councils and public presentations. This participatory approach ensures that tourism strategies are shaped by the needs and inputs of the community.

## **Challenges and Solutions:**

- **Tourism Pressure:** The city faces challenges similar to those of other popular tourist destinations, such as managing high tourism pressure. Strategies are aimed at preventing over-commercialization and maintaining the city's character.
- **Infrastructure and Mobility:** Ongoing infrastructure projects, such as improvements in public transport, are seen as critical for enhancing mobility and managing tourist flows effectively. These projects are expected to transform the city's dynamics.

### **Economic Empowerment and Cultural Preservation:**

- **Support for Local Businesses:** Initiatives are in place to support local artisans and entrepreneurs, integrating them into the tourism framework. Training programs and visibility campaigns help these local businesses thrive within the tourism sector.
- **Targeted Tourism:** There is a focus on attracting tourists who have higher spending power and who are likely to stay longer. This approach aims to maximize economic benefits while avoiding the pitfalls of mass tourism.

### **Monitoring and Evaluation:**

- **Data Utilization:** The use of an economic observatory is highlighted for monitoring tourism indicators and informing strategies. Although there are challenges with data delays, the city leverages various sources to guide its sustainable tourism efforts.
- **Stakeholder Collaboration:** Collaboration with various organizations and sharing data and insights are crucial for effective tourism management, ensuring that strategies are aligned and comprehensive.

### **Conclusion**

The interview provides a detailed overview of how CBT principles are being integrated into a broader tourism strategy within an urban context. Key strategies include balancing the needs of residents and tourists, distributing economic benefits, and preserving cultural heritage. By engaging local communities, supporting local businesses, and using data-driven decision-making, the aim is to foster a sustainable and inclusive approach to tourism development.

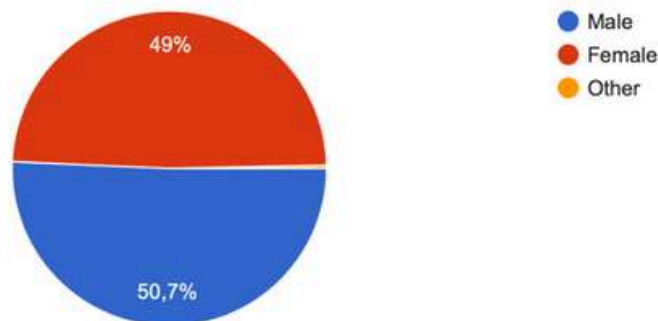
# Understanding Community-Based Tourism Development: Insights from a Survey

In order to gain insights into the development of community-based tourism (CBT) and understand citizens' interests, we conducted a targeted questionnaire. The investigation aimed to explore CBT dynamics and identify key factors influencing its success. This survey focused on contributions from respondents on LinkedIn, other social networks, and PBS alumni, collecting a total of 295 responses.

## Demographic Analysis

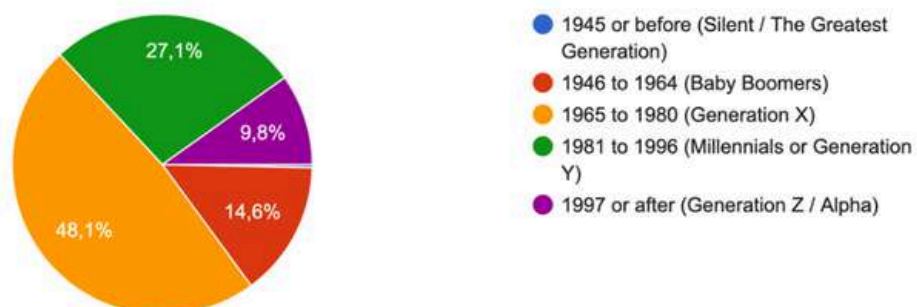
In terms of the gender of the respondents, the percentages were fairly balanced with approximately 51% male and 49% female.

Gender:  
290 respuestas



Regarding the generation of the respondents, the Generation X contributed the most, followed by Millennials and Baby Boomers.

Year of Birth:  
295 respuestas



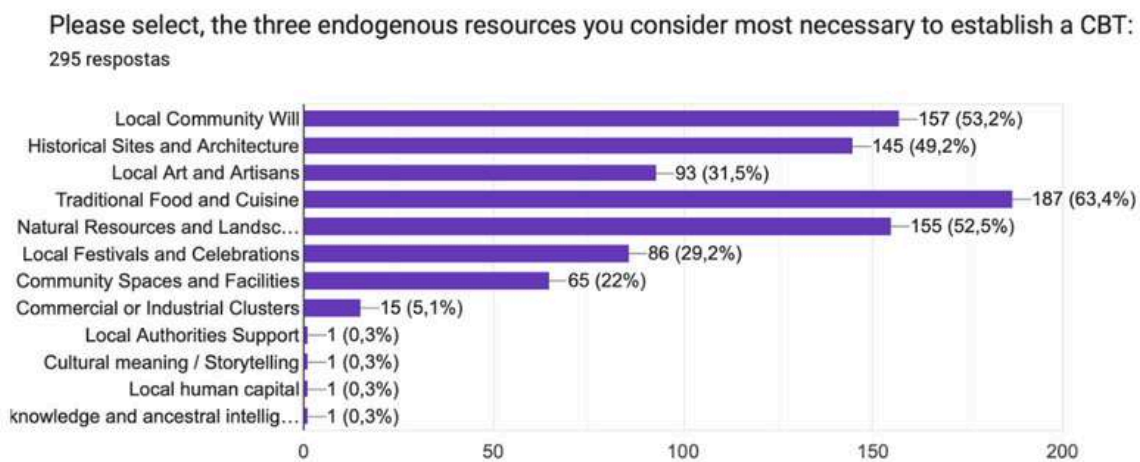
The diversity of nationalities among the respondents is noteworthy, with individuals from 24 countries. Of these, 70.17% are Portuguese, 23.37% are Brazilian, and the remaining 7.4% represent 22 other nationalities. This diversity contributes with a wide range of perspectives and experiences related to Community-Based Tourism.

In addition to Portuguese and Brazilians, there were responses from a wide range of countries, including Germany, United States, United Kingdom, Italy, Ukraine, Pakistan, Estonia, Romania, France, Spain, Netherlands and Bielorrussia. This diversity suggests that interest in Community-Based Tourism development is not limited to a specific region.

**Form Analysis**

When asked to select the three endogenous resources that the respondent considers most necessary to establish a CBT, the following items were selected most frequently:

1. Traditional Food and Cuisine (63.4% of 295 respondents)
2. Local Community Will (53.2% of 295 respondents)
3. Natural Resources and Landscape (52.5% of 295 respondents)

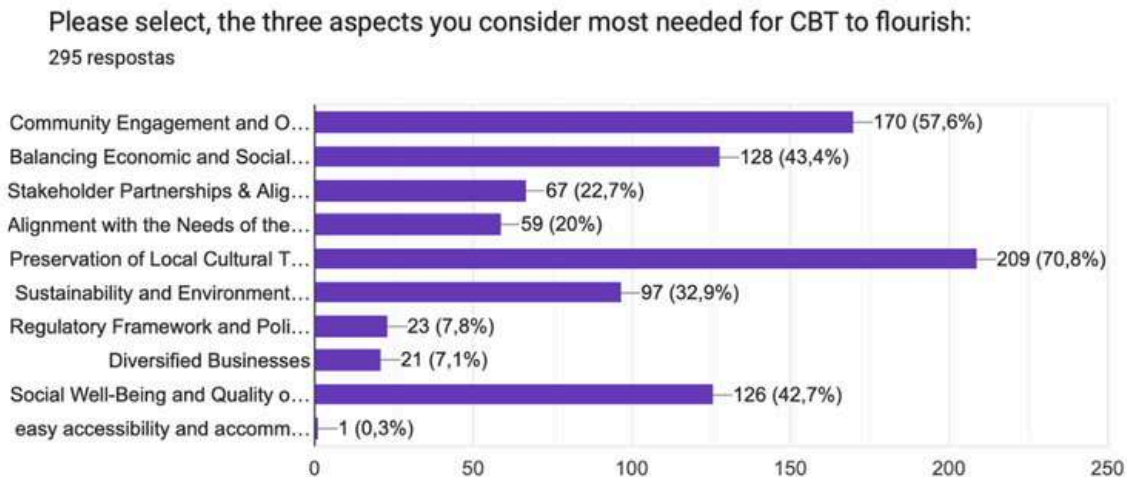


In addition to the three most highly voted factors, the indicator "historical sites and architecture" also emerged as a crucial factor for establishing CBTs, nearly reaching the third position.

Analyzing this issue reveals the community's desire to develop within the tourism sector and the growing relationship between tourists and the local communities they visit. Furthermore, the results underscore the importance of natural resources and cultural elements, such as gastronomy and history. Therefore, the factors identified align with trends towards more conscious and sustainable tourism.

Regarding the aspects that the participant considers most needed for CBT to flourish, the following responses were preferred:

1. Preservation of Local Cultural Traditions, Heritage, and Identity (70.8% of 295 respondents)
2. Community Engagement and Ownership (57.6% of 295 respondents)
3. Balancing Economic and Social Impact (43.4% of 295 respondents)



The top two responses align with the most popular answers from the previous question, reinforcing the respondents' perception of the importance of community engagement and a sense of belonging in their relationship with visitors, as well as the significance of preserving what attracts visitors: historical sites.

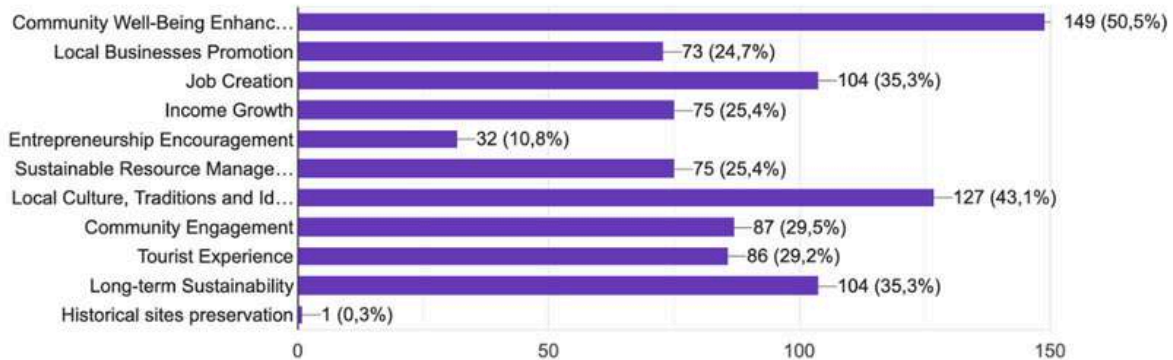
Conscious tourism is emphasized once again, highlighting the need for a balance between economic and social impacts on communities. Additionally, the factor "Social Well-Being and Quality of Life of the Residents" reiterates that tourism should not negatively impact the well-being and quality of life of communities, but rather enhance it.

In terms of the most significant impact indicators that should be monitored in a CBT's development, participants prioritized the following options:

1. Community Well-Being Enhancement (50.5% of 295 respondents)
2. Local Culture, Traditions, and Identities Promotion (43.1% of 295 respondents)
3. Job Creation and Long-term Sustainability (35.3% of 295 respondents each)

Please select, what are the three most significant impacts indicators that should be monitored in a CBT's development:

295 respostas



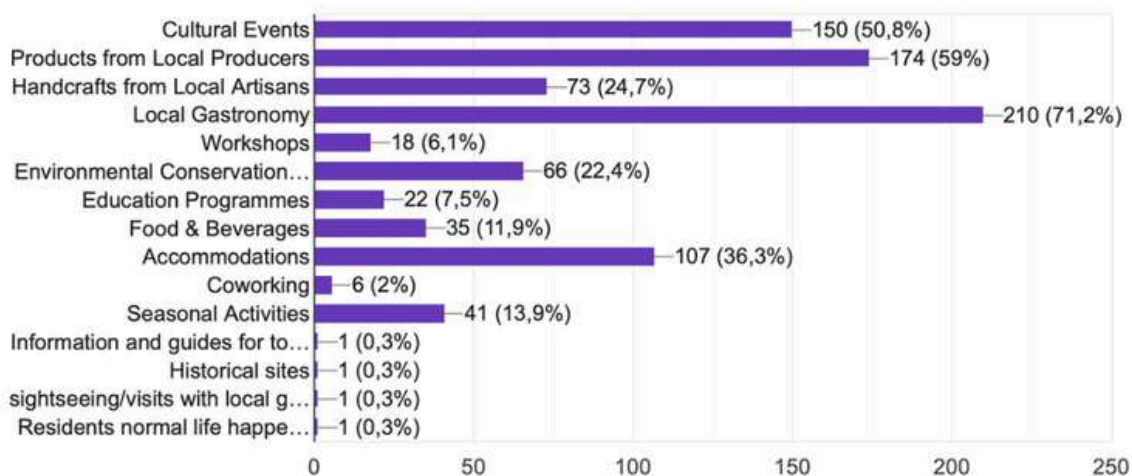
The top two choices reinforce the importance respondents place on the well-being and sustainable economic development of the community, as well as cultural preservation, remaining consistent with previous responses. Additionally, an equivalence was observed among the remaining five indicators, with the exception of the "entrepreneurship encouragement" indicator, suggesting a high level of acceptance among respondents for these factors.

When asked about the top three services or amenities that the participant expects to find in a CBT destination when traveling, respondents preferred the following ones:

1. Local Gastronomy (71.2% of 295 respondents)
2. Products from Local Producers (59% of 295 respondents)
3. Cultural Events (50.8% of 295 respondents)

Please choose the top three services or amenities you expect to find in a CBT destination, when traveling.

295 respostas



The three most selected options underscore the importance of travelers' desire to connect more deeply with local culture. This connection is enhanced through experiences involving local gastronomy, unique local products, and cultural events.

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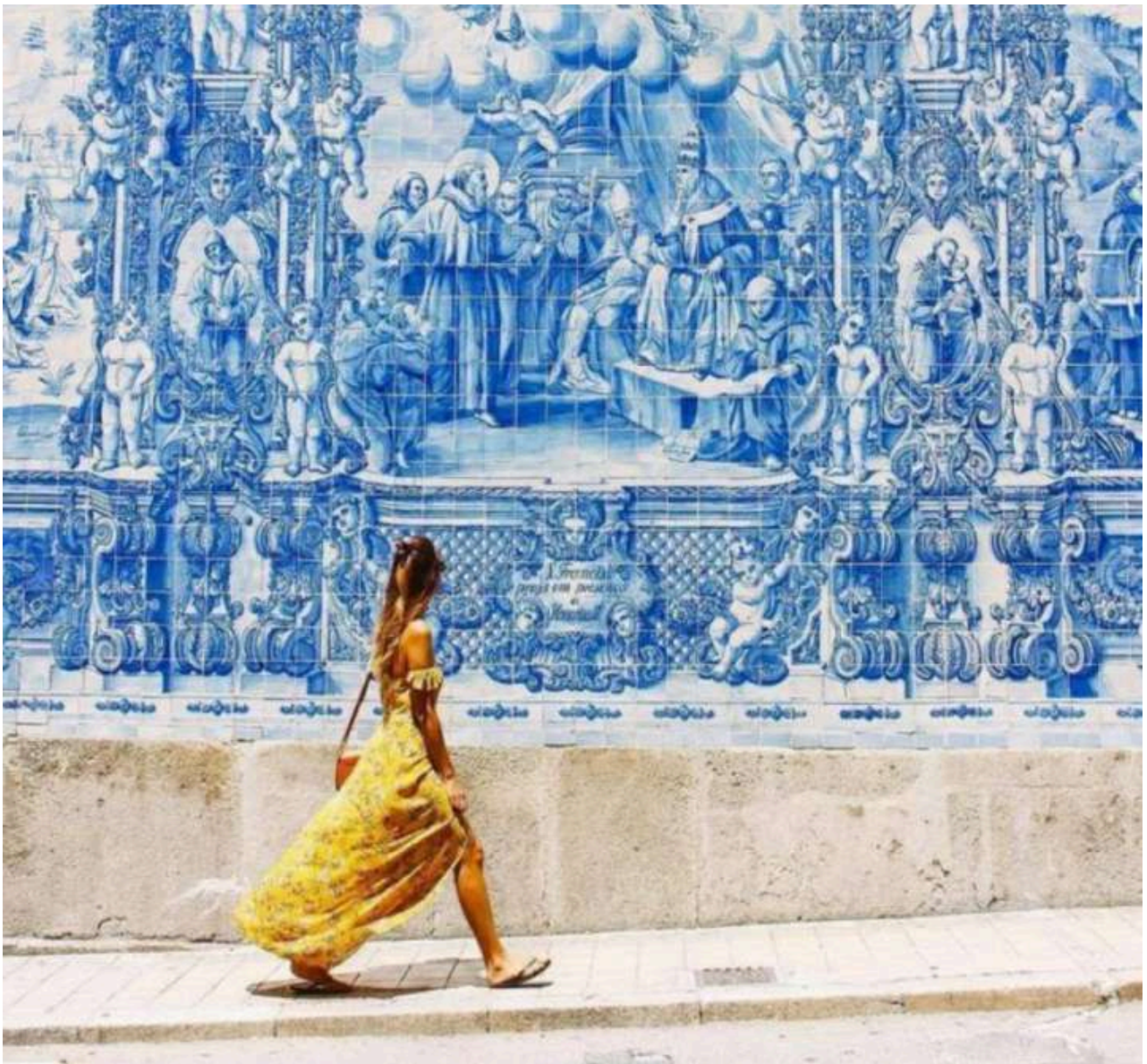
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# GOT ANY QUESTIONS OR SUGGESTIONS?

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