



CBI Product Factsheet Rural and Community Based Tourism (CBT) from Germany, the Netherlands, Spain and the UK to Latin America

'Practical market insights into your product'

Rural and CBT travellers from Germany, Netherlands, Spain and the UK are looking for authentic experiences and genuine interaction with local communities. Comfort is not a priority for these travellers but they do demand well-organised trips that give them experiences that would not get at home. The markets with the closest affinity to CBT are Germany, the Netherlands and the UK, however due to Spain's historic and linguistic associations with Latin America and the recent rise in trips to the continent, Spain is also an important source market.

Product Definition

CBT is a form of tourism that aims to include and benefit local communities, particularly indigenous peoples and villagers in the developing countries (DCs). For instance, villagers might host tourists in their village, managing the scheme communally and sharing the profits. There are many types of community tourism projects, including many in which the 'community' works with a commercial tour operator, but all community tourism projects should give local people a fair share of the benefits/profits and a say in deciding how incoming tourism is managed.

CBT is closely related to adventure and nature tourism. Travellers who partake in CBT can be referred to as 'responsible or ethical tourists'. They are similar to eco-tourists but their primary motivation is an interest in the local people rather than the environment, which is the priority for nature travellers.

Figure 1: Examples of CBT accommodation, activities and attractions



Traveller profile

Rural and CBT tourists cover an increasingly wide spectrum of traveller motivated by the experience rural and community tourism can offer. They are broadly similar to eco-tourists who are motivated by the natural environment of the places they visit and are interested in learning about the local communities who reside there. They are looking for an experience that cannot be provided by a mass-market holiday.

Ethical tourists travellers fall into two broad categories:

- **Hard-core CBT travellers.** People who are determined to have a genuine cultural experience. They look for authentic experiences and do not mind the discomfort that may come with it, in fact if the experience is too comfortable they worry that is it not authentic. They want to experience living as the locals live. This is a relatively small group across all countries.
- **Soft CBT travellers** are cultural and adventure minded travellers who are interested in contact with local communities, but are apprehensive about booking a CBT holiday because they are concerned about the level of comfort. However they are interested if the experience is really unique and worthwhile. This group is larger than the group of hard-core CBT travellers and offers more growth potential.

Demographic characteristics

CBT travellers are generally well educated, well travelled consumers from the higher socio-economic groups.

Three main demographics segments are relevant to the rural and CBT tourism sectors:

- **Younger travellers:** 18-30 year olds and the 31-44 year olds. They have often travelled in their youth and/or studied

Consideration for Action

- Emphasize the authentic experience your product offers.
- If you are targeting this market ensure you can support any claims you make about sustainability and consider applying for sustainable accreditation.
- Accommodation providers can increase the level of comfort they offer by providing good beds, bathroom and shower facilities and a variety of good quality food. It is important to be clear about the level of facilities offered so travellers expectations are realistic and they do not leave disappointed.
- Tour operators that target this market are now packaging 'Once in a lifetime' holidays highlight the unusual experiences

abroad. They can be differentiated into:

- High income, little time: Young professionals who have high income but limited time to travel. They mostly travel in couples, although there is also a singles market in this age group, and are looking for unusual 'once in a lifetime' experiences and want to fit as much into their holiday as possible. These are mostly Soft CBT travellers.

- Smaller daily budgets, extensive time eg, backpackers and gap year travellers who are travelling between their studies or during a career break. Their daily budgets are small but they travel over extended periods, from a month to a year. They choose cheaper accommodation and want to engage with the local communities they visit and experience local activities and products. They may combine their travels with volunteer work on community or conservation projects. The majority of these young people will continue to travel in the region for extended periods. They are keen for their family and friends to know about the life-changing experiences they are having.

- **Families with children older than 8 years old** who are looking for experiences they can enjoy with their children, they are particularly interested in activities that combine fun and excitement with learning. Health and safety are a consideration for this segment; destinations that do not require yellow fever vaccinations or malaria pills are preferred. Dutch parents are most interested in taking CBT holidays with their children.
- **'Empty-nesters' aged 45 to 65 from Germany, Netherlands and UK** are the largest demographic groups. They are still healthy and their children have left home, giving them more time and disposable income. They are experienced travellers and have high expectations of quality and value for money although they are happy to pay more for high quality CBT experiences. They are mainly interested in soft adventure activities, combined with comfortable or luxury but also authentic experiences.

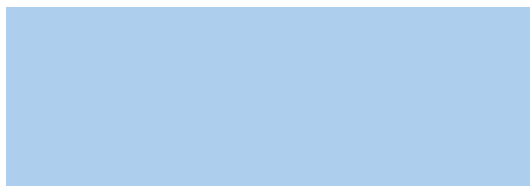
Geographic characteristics

- **Spain has a younger demographic** with 30-40 year olds being the largest demographic group. It also has a historic and linguistic relationship with Latin America which is of potential interest to this market.

they offer.

- High income, little time travellers find comfort an important factor. If you target this market, increase the level of comfort offered.
- Single travellers want opportunities to meet other travellers of a similar age, for example in small group activities or learning experiences. They also look for holidays that do not charge them supplements for being a single traveller.
- Although backpackers have low budgets they may stay for longer than main stream holidaymakers if there is enough for them to do in an area and will spend money on exciting 'one off' experiences that they can't do elsewhere. Work with other local businesses to promote a mix of suitable accommodation and community activities that appeal to this market.
- Work with reputable volunteer organisations to identify genuine community or conservation projects for volunteers.
- Backpackers and young professionals can be excellent ambassadors for your community if you can get them to write reviews, tell their friends about their amazing experiences on social media networks such as Facebook and post their photos and videos on sites such as Facebook, Instagram, YouTube or Pinterest.
- Well off families look for exciting experience that will broaden their children's knowledge of the world. Look at the tours offered by tour operators who specialise in this segment in your target market to see if you can offer what they need.
- If you target families emphasise activities that are designed with children in mind, particularly access to animals and wildlife and any learning experiences.
- When targeting families, emphasise the safety of your destination.
- A combination of unique, authentic experiences combined with cultural and soft adventure activities appeal to this market and should be emphasised in any marketing materials. However this group also have high expectations of quality and value for money.
- If your destination lies in a yellow fever vaccination area, you may not want to focus on people over 65 years of age as yellow fever vaccinations are not recommended for people over 65.

- **German, Dutch and British travellers are key target groups.** The UK has been a leader in establishing the responsible travel movement and German and Dutch consumers are most concerned about sustainability.



Product Specification

Figure 2: Principles of community tourism

Be run with the involvement and consent of local communities	• Local people should participate in planning and managing the tour
Give a fair share of profits back to the local community	• Ideally this will include community projects (health, schools, etc)
Involve communities rather than individuals	• Working with individuals can disrupt social structures
Be environmentally sustainable	• Local people must be involved if conservation projects are to succeed
Respect local traditions	• Traditional culture and social structures must be respected
Help communities cope with the impact of western tourists	• By putting the right mechanisms in place
Keep groups small	• To minimise cultural and environmental impact
Brief tourists before the trip	• To ensure they understand what is appropriate behaviour
Not make local people perform inappropriate ceremonies	• Local people should decide how to portray their traditions
Leave communities alone if they don't want tourism.	• People should have the right to say 'no' to tourism

Source: *Tourism Concern*

- **Authenticity balanced with quality.** Authentic experiences are the most important element of a CBT trip. However CBT European travellers, are mostly from the higher socio-economic groups and have high standards relating to the quality of a trip, expecting it to be well organised with hospitable staff and experienced guides. They prefer local guides, small groups, remote destinations and meaningful educational content.
- **Natural, historical and cultural sites and attractions** are highly valued by CBT travellers. They are looking for interaction with lifestyles and cultures that are different from their own and seek authentic aspects of their destination such as regional food, traditional and natural designs, small-scale accommodation run by local people.
- **Activities.** Popular activities for CBT travellers include visiting a village, seeing how families live, participating in daily activities such as cooking, farming and handicraft, walking tours, traditional dances and music and discovering local wildlife.
- **Price sensitive and value for money.** The

Considerations for action

- Focus on experiences that are authentic.
- Offer high quality service. Train your staff in hospitality, hire experienced guides and keep time schedules.
- Do not say your quality is higher than it is, otherwise your clients will be disappointed.
- CBT travellers are looking for authentic experiences and are more likely to accept things may not run smoothly all the time.
- Include visits to natural, historic and cultural sites in tours as well as local activities.
- Offer accommodation such as homestays that give travellers opportunities to meet local people
- Provide well-trained guides, preferably from local communities, who are highly knowledgeable about local traditions and can make genuine introductions to local people.
- Find out what other similar CBT

European markets have all been affected by economic recession since 2009, Spain in particular. The socio-economic group that will take a CBT trip to Latin America still have disposable income, but are careful about how they spend it and want to feel that they are receiving value for money even for an expensive holiday.

- **Sustainability** is important for CBT travellers, particularly the Dutch and Germans. Responsible tourism is increasingly important to tour operators, particularly among specialist adventure and nature operators that use the 'responsible tourism' banner as a selling point for many trips.
- **Health and safety.** Safety is an important consideration for CBT travellers who will expect the company and guides to have a good knowledge of potential risks and how to manage them.
- **Independent travel versus package travel.** CBT travellers are most likely to book independently, buying direct from local incoming tour operators and accommodation providers, in destinations they are familiar with. The Spanish, in particular, mostly book their holidays directly and as they are familiar with the language in Latin America they may feel confident booking their own arrangements. However as most of these European travellers have not been to Latin America before and repeat visits are low, booking through tour operators will be relatively higher compared to more familiar and accessible destinations in Asia such as Thailand. This is particularly the case for 'soft' CBT travellers.
- **Tailor made flexible itineraries** are increasingly popular with experienced travellers who want to have an individual itinerary but prefer a specialist to arrange and book it for them.
- **Language** English is widely used by German and Dutch travellers. Webpages and other promotional material can therefore be in English, however some German content would add appeal particularly for the older German nature travellers and other German speaking markets.
- **German speaking markets** include not only Germans but also the Swiss and Austrians. The Swiss in particular have not suffered from the economic recession to the degree felt in most other European countries and although it is a small market the Swiss have relatively high levels of disposable income. Experiences cost so you know whether your offer is competitive or not.
- Ensure that you can substantiate any claims you make about your responsible business practices. Beware of 'greenwashing'. Consumers are getting increasingly aware of businesses that make claims about 'green credentials' that are not genuine. These businesses are likely to get poor reviews on consumer feedback sites eg, TripAdvisor which may have a negative impact on their reputation.
- Tour operator partners will want to see your health and safety policies and independent travellers will be reassured to be able to find these policies on your website.
- It is important to respond quickly to both direct enquiries through your website or by email and from tour operators. The European travel market is very competitive and tour operators and travellers will soon look for alternatives if they do not receive a reply from a query within about 24 hours.
- If you want to sell your products through the travel trade and work with European tour operators it is essential to understand how the industry works, for example relevant commission rates, competitive pricing, quality and health and safety standards.
- The tour operators that are organising tailor made/ Fully Independent Travel (FIT) usually need good local partners to help them organise these individual trips. Look at the websites of tour operators offering this service to see whether you have the type of product that would meet their customers' needs.
- Nature and wildlife activity and tour providers should provide guides and instructors that speak good English for all markets. If you specifically want to target the German, Dutch or offering German guides would be advantageous.
- Use English on your website and other marketing materials. If you are considering targeting the German market include Switzerland and Austria.

income making them a potentially lucrative market. German tour operators may also have offices in these territories making them easier to reach.

Legal requirements

- **No legal requirements.** There are no legal requirements for long haul tourism as it is offered outside the EU market. However, there are some EU travel and consumer laws that are applicable to tourism within the EU, for example the Travel Package Directive that protects consumers who contract package travel within the EU.
- **An increasing number of British, German, Dutch and Spanish tour operators expect their suppliers to have liability insurance.** Most British, German, Dutch and Spanish travellers purchase travel insurance before going on holiday. However tour operators across the EU are increasingly asking potential suppliers and local partners to have liability insurance to cover possible damage and accidents involving their customers, especially for travel outside the EU. This is because their own liability insurance does not usually cover damage caused by third parties. Liability insurance maybe difficult to obtain in Latin America but suppliers with this insurance will have a great advantage.

Non-legal requirements

- **The travel trade in the Netherlands, Germany and the UK is primarily driving the growth of responsible tourism** and sustainable certification. To deliver the quality and standards required they are increasingly choosing suppliers that do more for their local communities and environment.
- **Sustainability labels.** British, Dutch, and German rural and community tourism tour operators are increasingly looking for responsible tourism partners. Latin American CBT suppliers can use this to their advantage by making their products more sustainable. Examples of credible sustainable and/or green tourism certification programmes are Green Globe, Rainforest Alliance, STEP and Travelife. TourCert is also being used in Germany. There are also local sustainability initiatives, for example, Smart Voyager in Ecuador and CST in Costa Rica, TOPS (Tour Operators promoting Sustainability) in Nicaragua.

Germany

- **DVR is the German Travel Association.** It is a leading trade advocacy group and represents a large proportion of Germany's tour operators and travel agents.

Netherlands

- **ANVR membership is standard for Dutch**

Considerations for action

- Study the [Travel Package Directive](#). Although it is not applicable to long haul tourism, it can help you to better understand the EU tourism market.
- Study the terms and conditions of the main EU tour operators as these reflect EU travel and consumer laws and will give you an understanding of what they expect from their local suppliers.
- Communicate to your customers the importance of obtaining travel insurance, especially if your company does not have liability insurance.
- Obtain liability insurance and communicate to (potential) partners that you have such insurance.
- If it is not possible to purchase liability insurance in your country, constantly lobby your authorities and trade associations to make such insurance possible. Also discuss it with (potential) British, Dutch, German and Spanish partners as they might have some influence.

Considerations for action

- Familiarise yourself with the requirements of sustainability certification eg, Travelife to understand what is expected from suppliers.
- Implement responsible tourism best practices or apply for sustainable certification. For more information, refer to CBI's study '[Sustainable Tourism Certification \(Incubator market\)](#)'.
- Find out if your country has its own responsible or ethical tourism or sustainability label and apply for the label for your business. Also, make sure that your business is visible on their website.
- Only register with recognized labels. Dutch, German and British travellers are cautious about sustainability labels and will probably check the credibility of your sustainability label.
- Target specialised niche CBT tour operators
- Many of the Dutch tour operators that

tour operators. Membership of the Dutch Association of Travel Agents and Tour Operators (ANVR) is seen as standard. However the majority of ANVR's members are generalists and many specialised tour operators are not members as requirements are too high, especially financially. However, this does not mean that they would not be interesting partners.

- **The Dutch travel trade is very committed to sustainability.** The Netherlands is the only country in Europe where all tour operators, through the ANVR, have signed an agreement with Travelife.

Spain

- Travelife has recently been introduced to Spanish tour operators but uptake is very low in comparison to the other European markets.

UK

- **ABTA** is the UK's leading travel association. Booking a holiday through an ABTA member gives consumers' financial protection and works to raise standards, including sustainability, in the industry.
- **Association of Independent Tour Operators (AITO)** represents 120 independent tour operators that specialise in destinations or types of holidays including volunteering holidays. AITO has had a responsible tourism policy since 2000 and has developed a classification system based on a 1-5 star rating to help monitor and progress sustainable tourism issues. Their Sustainable Tourism Committee advises, encourages and assists its members to progress responsible tourism.

operate in Latin America may not be members of ANVR.

- Check that any UK travel business you are working with is a member of ABTA as 70% of British consumers consider ABTA membership to be essential when booking their holidays.
- Use the AITO website to find specialist tour operators that could make good partners.
- Contact AITO to get their advice on the actions you could take to meet their member's requirements.

For more information about the expectations of tourism buyers in the EU+EFTA tourism market in general, refer to CBI's 'Buyers' Black Box' for tourism.

Trade and Macro-Economic Statistics

Outbound travel statistics

- **Estimate of global market size - a niche market that is difficult to measure.** CBT is a key pillar of Responsible Tourism, it overlaps with ecotourism and as a niche market, there is a lack of hard statistical data that make it difficult to measure its size. The data that is collected does not usually distinguish responsible tourism from eco or nature tourism and possibly adventure tourism. There are various estimates of the global size of the market:
 - **Socially and environmentally responsible** forms of travelling accounts for 15% of the global tourism market, and continue to grow at the rate of 30% every year according to TIES.
 - **Ecotourism is growing significantly** and the future for the industry is strong, with experts including the Worldwatch Institute predicting growth rates of between 20-34% annually. UK research specialist Mintel

Considerations for action

- The global responsible and CBT market is expected to continue to grow and be an increasing proportion of the total tourism market. As the market grows, responsible business practice is more likely to become standard practice and tour operators from the major source markets will expect their suppliers to provide evidence of their sustainable actions. Familiarise yourself with the standards expected and start to plan what actions your organisation needs to take to become accredited.

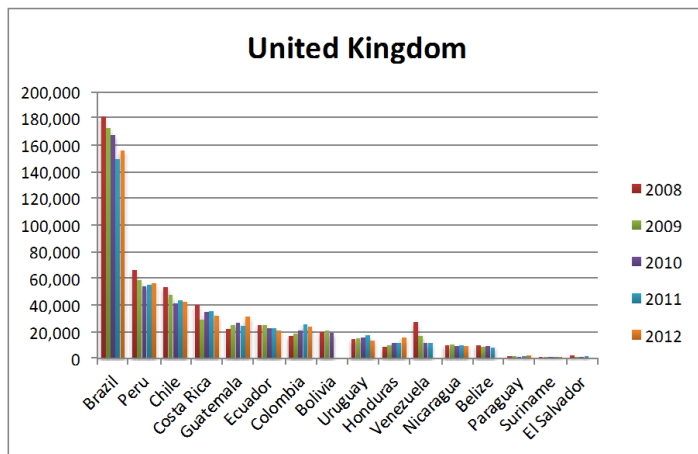
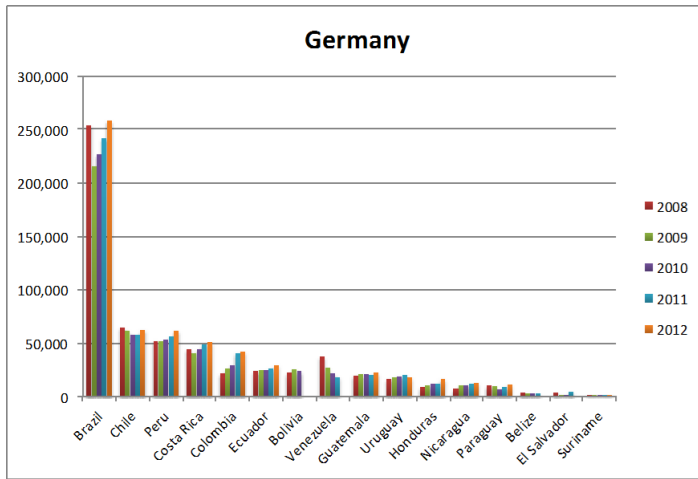
agrees, predicting 25% year-on-year growth rates. Equally positively, the Voluntary Initiative for Sustainability in Tourism (VISIT) estimates that ecotourism will account for 5% of the global travel market by 2024.

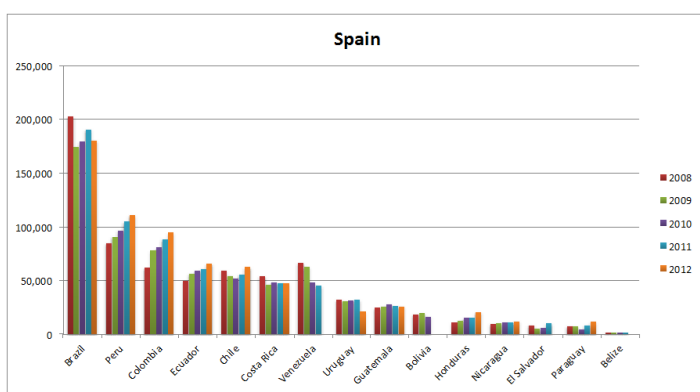
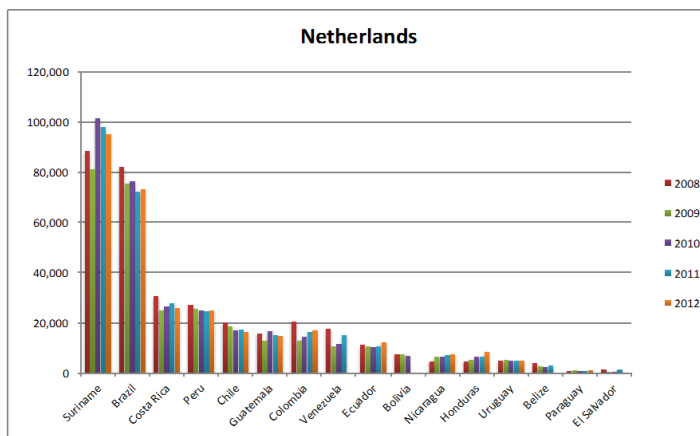
- **Nature tourism** accounts for 20% of global tourism in many areas, and is growing three times as fast as the industry as a whole, according to the UNWTO.

- **Key source markets** tend to be from developed nations where there is an increasing awareness of the need for responsible tourism. The key international markets include the UK, Germany, and the Netherlands.



Figures 3-6: Outbound trips per Latin American country*, 2008-12





Equivalent data for Argentina is not available. It is estimated to be between Brazil and Peru.
Source: UNWTO

- **Germany is the largest outbound travel market in the EU** with over 85.7 million trips in 2012.
- **Germany, Spain and the UK are the three larger markets to Latin America**, with Netherlands generating fewer visits.
- **Popular Latin American destinations. Brazil, Argentina, Peru, Chile and Costa Rica** are the top five most popular destinations in Latin America for visitors from Germany and the UK. In addition, the Netherlands' top destination is Suriname due to the historic ties between the two countries.
- **Columbia and Guatemala** are the next most popular destinations with Columbia being most popular in Germany and Netherlands and Guatemala being most popular with the British.
- **The popularity ranking of Latin American destinations is similar in the three north European markets** (with the exception of Suriname for the Dutch market) with Nicaragua being the 12th most popular destination in the Netherlands and the 13th Germany and the UK.
- **For the Spanish market** the top 3 Latin

Considerations for action

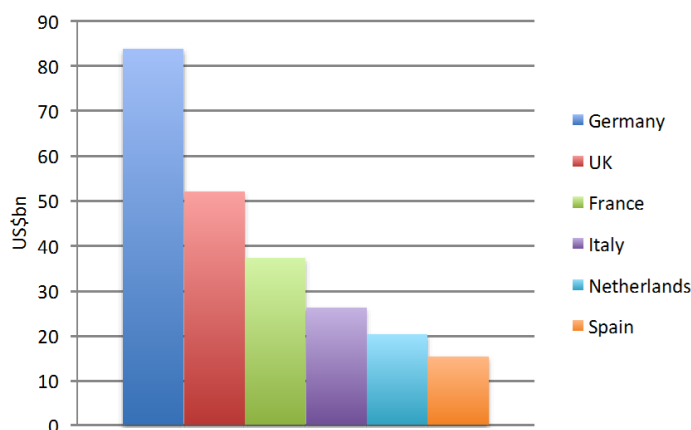
- Join forces with other CBT providers in your country to strengthen your position as a CBT destination. Link the various CBT projects together to create an interesting tour through the region (accommodation, villages, transport etc).
- If you speak the language and can build contacts, target the German market (together with the other German speaking countries) it is the largest outbound market in the EU, with growth in the number of trips to all Latin American countries over the past 5 years and is concerned with CBT and sustainability.
- The UK, the Netherlands and Spain are also strong potential markets to target if you have the resources. If you have limited budget focus on the market where you have good connections or speak the language.
- Although Spain is a larger market than the Netherlands and trips to Latin American are growing, it is less interested in CBT.
- Research competitor markets to see what they are offering and how they are positioning themselves on quality and type of CBT experience offered and on

American destinations are Brazil, Peru and Colombia, followed by Ecuador and Chile. Nicaragua is the 12th most popular destination.

- price.
- Consider which market segments you plan to target and how you can differentiate your offer from those in competitor countries. Highlight these differences in your promotional materials.

General Tourism expenditure

Figure 7: European source markets by international expenditure 2012



Source: UNWTO

- Germans spend the most on international travel** by a considerable margin. All the European markets studied for this report increased their expenditure in 2012 compared to 2011 with Germany expanding the most, with a 6% increase, followed by the UK with an increased expenditure of 4% after several years of decline.
- The over 65 year olds** expenditure on travel has increased the most (32%) amongst European travellers. The other age groups who have increased their expenditure, but by only 2%, are the 15-24s and the 45-64s. Whereas expenditure by the 25-44 year olds has decreased by 20%.

Considerations for action

- Although 2012 showed positive result for tourism expenditure, previous years have shown considerable decline. In the UK for example, expenditure decreased by almost 24% from 2008-11. Consumers are still cautious and although they are prepared to spend money on travel you need to highlight the value they will get from their experience with you.
- The backpackers, young professionals and baby boomers have all shown some growth in tourism expenditure, but to capture the biggest spending market, the 65 year and overs, it would be important to offer CBT tourism with a focus on health and safety, quality and comfort.

For more information on tourism trade statistics and macro-economic indicators in the EU+EFTA market, refer to CBI's 'Tradewatch' for tourism.

Market Trends

Social market drivers

- Demand for CBT is growing** because of increasing interest in holidays that include new experiences and an authentic cultural experience. As Latin America has a wealth of indigenous communities, this offers an interesting market for Latin American CBT providers.

Considerations for action

- Differentiate your business and the experience you offer from your neighbours. Focus on providing authentic experiences that represent the knowledge and skills of your community.
- Accommodation providers can provide family stays or unusual accommodation such as sleeping in a hammock or tree house.

- **Auditing by tour operators** of both their tours and accommodation suppliers is already happening and is likely to become more common.

- Provide a flexible offer - develop different types of accommodation, activities, price and comfort levels. Independent travellers and European tour operators can combine these elements to create a programme that suits them and is different to their competitors offer.
- Network and recommend other local community activities, it will keep your visitors in the area for longer and other communities may do the same for you.
- Operating as a responsible tourism business that minimises the negative impacts of tourism and promotes the positive impacts, will expand opportunities to attract more affluent market segments and supply the growing number of outbound tour operators that are looking for responsible suppliers that operate sustainably.

Technology market drivers

- **German, Dutch, British and Spanish CBT travellers increasingly use the internet to research new destinations**, mostly using Google. Customer review sites such as TripAdvisor, travel forums and blogs, Google Earth, YouTube etc give travellers a good impression of their proposed destination. Photos and videos are the most influential tools.
- **Social media networks** such as Facebook, Instagram, Pinterest and Twitters and consumer review sites, primarily TripAdvisor are overtaking the influence of word-of-mouth recommendations.
- **Younger CBT travellers** – particularly backpackers, young professionals and young families are most likely to use social media not only to plan their trips but to comment and share their experiences, photos and videos.

Considerations for action

- Ensure your website is professional with high quality photos and videos and is well optimised, in order to be ranked highly in Google searches. This has become increasingly technical, and Google change their search engine optimisation (SEO) criteria regularly. Unless you are very knowledgeable it is best to use a SEO specialist, as this is likely to be your most important form of marketing.
- Identify someone in your organisation who can actively participate on social media networks such as Facebook and specialist forums, encourage reviews and feedback from your visitors to increase awareness, monitor what is being said about your organisation, influence decision making of travellers and generate traffic to your website.
- Social media activity is especially valuable if your business is targeting younger age groups or specialist nature lovers, who are high users of technology.
- Encourage your guests to write reviews, share their photos and videos and make them ambassadors for your business.

For more information on market trends on the EU + EFTA tourism market in general, refer to the CBI's 'Trend Mapping' for Tourism.

Market Channels and Segments

The British, Dutch, German and Spanish source markets are highly competitive. Direct sales with local suppliers are increasing via the Internet especially for CBT products. However the traditional distribution channels via tour operators and intermediary companies still hold a strong position for volume sales. For further information and an illustration of the range of distribution channels in these markets visit the [CBI Tourism Channels and Segments](#) website page.

- **CBT holidays from Europe to Latin America are mostly sold by niche tour operators**, rather than the large mass-market tour operators. Latin America is an emerging destination, particularly for the German, Dutch and British markets, and offers many relatively unknown destinations. Specialist CBT tour operators therefore play an important role in the European CBT market to Latin American. However it is a highly competitive market with both buyers and consumers having a wide range of suppliers from worldwide destinations to choose from.
- **CBT is increasingly being offered as part of an adventure or cultural tourism holiday**. Therefore European cultural and adventure tour operators could be an effective market channel for Latin American CBT providers.
- **Niche tour operators need reliable local partners**. The four European markets looked at in this study all have niche tour operators that specialise in CBT tours to Latin America and who mostly offer tailor-made tours (FIT) to their clients. They need reliable inbound tour operators, or Destination Management Companies (DMCs) to deliver tours for them that are different and stand out from those offered by their competitors and are run efficiently.
- **Digital Booking Agents**. There are relatively few online European-based sustainable tourism specialist agencies and booking sites. These sites fall into two categories: those that charge a commission for bookings made via their website and those that charge membership fees to business listed on their website. Membership agencies tend to be more popular with CBT accommodation providers serving as a group or community focal point as well as a booking service.

Considerations for action

- Identify the niche tour operators in your target markets that offer CBT, adventure and cultural tours to Latin America.
- Join relevant trade associations in your target markets.
- Attend trade fairs that match your product, or combine your marketing activities with other local businesses to share costs and jointly promote all there is to do in your area.
- Study websites of specialised tour operators in your preferred markets to obtain information about the interests of potential travellers as their product offering largely reflect these interests.
- Read the travel press and consumer travel supplements in your target market (mostly available online) to find out the types of stories they run.
- The longest established agency that offers CBT holidays in Latin America is www.ResponsibleTravel.com. Contact them to see if you meet their criteria.
- Find out if your regional or national tourist board promotes CBT providers

Trade associations, trade fairs and databases can be good sources for finding specialised rural and CBT tour operators. Examples of such sources are:

Trade Associations

- British Travel Association (ABTA) <http://abta.com/go-travel/before-you-travel/find-a-member>
- The British Association of Independent Tour Operators (AITO) www.aito.com has a search facility to find specialist tour operators.
- Dutch Association of Travel Agents and Tour Operators (ANVR) www.anvr.nl
- German Travel Association (DRV) www.deutschertourismusverband.de/themen/touristische-studien has reports on the German travel and tourism market including adventure travel
- Spanish National Travel Agents Association (AEDAVE) www.aedave.es
- Spanish Centre for Responsible Tourism www.rutspangea.com

Trade and Consumer Shows and Awards

- Ecotourism and Sustainable Tourism Conference, Bonito, Brazil April 27-30, 2014 www.ecotourismconference.org Annual conference providing practical solutions to advance sustainability goals for the tourism industry. 450+ exhibitors.

- Fiets en Wadelbeurs www.fietsenwandelbeurs.nl cycling and walking trade fair, held annually in February in Amsterdam
- FITUR http://www.ifema.es/fitur_06 one of Europe's top three trade and consumer exhibitions, held annually in January in Madrid, Spain
- ITB Berlin – www.itb-berlin.de largest tourism trade fair in the EU market held each March
- The Telegraph Adventure Travel Show: 25-26 January 2014 London www.adventureshow.com
- Tour Nature www.tournatur.com walking and trekking trade fair held annually in September in Dusseldorf
- Vakantiebeurs www.vakantiebeurs.nl the main Dutch consumer tourism trade fair held annually in January in Utrecht
- World Responsible Tourism Awards 2014 www.responsibletravel.com/awards Now in their 11th year, the newly renamed World Responsible Tourism Awards are the largest responsible tourism awards in the world, and since their inception in 2004, have attracted over 12,000 nominations from the public (individuals, organisations and destinations) leading to 201 organisations Awarded from 51 countries. Annual awards announced on World Responsible Tourism Day at WTM in November; nominations by mid June.
- World Travel Market (WTM) www.wtmlondon.com the world's largest travel market, held annually in November in London.

Internet Research

You can look for specialised tour operators by using search engines such as Google. To narrow your searches use the domain for each country and Google Translate. Search domains and examples of keywords:

- *Germany:* www.google.de Keywords: Community-based Ferien / Reiseveranstalter, (community-based holidays/ tour operators) ethische Ferien / Reiseveranstalter (ethical holidays/ tour operators) verantwortungsvollen Tourismus Ferien / Reiseveranstalter (responsible tourism holidays/ tour operators), Ökotourismus Urlaub / Reiseveranstalter (ecotourism holidays/ tour operators), Bed and Breakfast, Privatunterkünfte (homestays), Bauernhof (farmstays)
- *Netherlands:* www.google.nl Keywords: Community-based feestdagen / touroperators (community-based holidays/ tour operators), ethische feestdagen / touroperators (ethical holidays/ tour operators), verantwoord toerisme vakanties / touroperators (responsible tourism holidays/ tour operators), ecotoerisme vakanties / touroperators (ecotourism holidays/ tour operators), bed & breakfast, gastgezinnen (homestays), Farmstays
- *UK:* www.google.uk Keywords: community-based holidays/ tour operators, ethical holidays/ tour operators, responsible tourism holidays/ tour operators, ecotourism holidays/ tour operators, bed and breakfast, homestays, farmstays
- *Spain:* www.google.es Keywords: días de fiesta de la comunidad / tour operadores (community-based holidays/ tour operators), vacaciones éticos / operadores turísticos (ethical holidays/ tour operators), las vacaciones de turismo responsable / operadores turísticos (responsible tourism holidays/ tour operators), las vacaciones de ecoturismo / operadores turísticos (ecotourism holidays/ tour operators), bed and breakfast, casas de familia (homestays), agroturismo (farmstays)

Publications - Magazines:

- National Geographic <http://adventure.nationalgeographic.com/adventure/>
- National Geographic Traveler www.natgeotraveller.co.uk (UK)
- Conde Nast Traveller www.cntraveller.com
- Geo www.geo.fr
- Lonely Planet Magazine www.lonelyplanet.com/magazine
- Sidetracked Adventure Travel Magazine www.sidetracked.co.uk
- Travel + Leisure www.travelandleisure.com
- Wanderlust www.wanderlust.co.uk

Publications - Newspaper Travel Supplements:

- Frankfurter Allgemeine Zeitung (FAZ) (Germany) www.faz.net
- Telegraph Travel Section (UK) www.telegraph.co.uk/travel/
- The Guardian travel section <http://www.theguardian.com/travel>
- Sunday Times travel <http://www.thesundaytimes.co.uk/sto/travel/>

Responsible Tourism Resource Websites and Social Networking

- Eco Tourism Blog www.ecotourismblog.com Site for environment friendly tourists
- Ecotourismize www.ecotourismize.com
- Greenloons www.greenloons.com Ecotourism travel resource featuring destination profiles, environmentally friendly travel tips, certification information and trip reviews.
- Your Travel Choice www.yourtravelchoice.org The resource website of the International Ecotourism Society (TIES) providing an interactive online communication platform.

- **Direct bookings are increasing from experienced travellers** who are comfortable booking their travel own arrangements direct with local suppliers.
- **Younger travellers** are most likely to book direct with local suppliers. They will expect quick responses to their enquiries. Backpackers tend to book locally.
- **Tailor made tours (FIT) are increasing for CBT holidays** as family groups and older visitors prefer security of a tour operator for a destination they are unfamiliar with, but they also want individual experiences.
- **Single travellers** who do not want to travel alone choose small group tours.

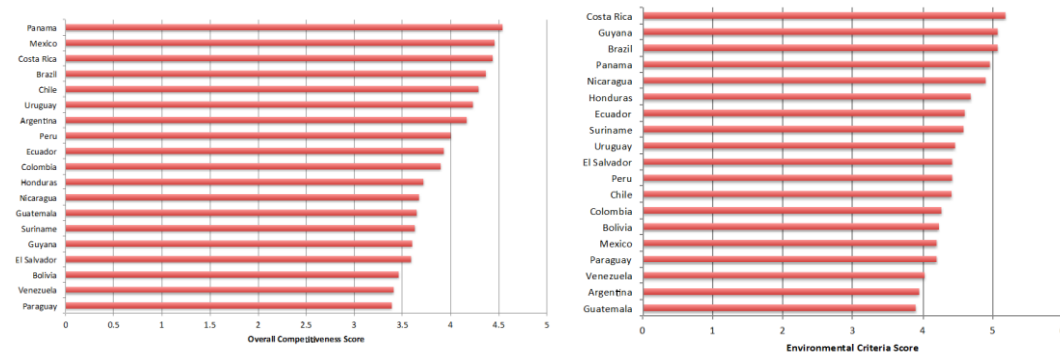
Considerations for action

- Ensure your business can be found on the internet and that your website makes it clearly how to contact you by email and phone or offer online booking.
- Be available and answer any queries or booking enquires quickly.
- Your website will need to be professional, well optimised, display excellent photos, visitor reviews. Feature your key activities and stories about who you are and why you are different from other CBT accommodation or activity provider by focusing on the specific traditions and lifestyle of the communities you represent.
- Participate in social media conversations to find out what CBT travellers are interested in.

For more information on market channels and segments on the EU+EFTA tourism market in general, refer to CBI's 'Market channels and segments' for tourism

Market Competitiveness

Figures 8 & 9: Travel & Tourism Competitiveness Index Scores for Latin America



Source: *The Travel and Tourism Competitiveness Report, 2013*

- **The Travel & Tourism Competitiveness Index provides insights** into how competitive your country is by assessing how attractive a country's travel and tourism industry is for investment. It measures 14 pillars including Environmental Sustainability, Natural and Cultural Resources; Regulatory Framework & Business environment. For tour operators in the British, Dutch, German and Spanish markets it gives them information about

Considerations for action

- Understanding how European travellers perceive your country and your business is central to being able to meet their needs and market your businesses successfully in a very competitive market.
- The Travel & Tourism Competitiveness Index is a useful guide to the elements that are important for tourism investment and for a CBT destination. Use it to see

which countries would be worth investing in. For local tourism providers it provides insights into their country's strengths and weaknesses.

- ***In Latin America, the top 5 performing destinations*** for overall competitiveness in 2013 are Panama, Mexico, Costa Rica, Brazil and Chile.
- ***For Environment Sustainability Guyana and Nicaragua scored in the top 5***, whereas Chile and Mexico drop to 12th and 15th places respectively.
- ***International benchmarking is provided by The Adventure Tourism Development Index (ATDI)*** that ranks countries based on 10 Pillars of Adventure Tourism Competitiveness. Natural and cultural resources are two of the 10 Pillars, highlighting the links with CBI, nature and adventure tourism. The 10 Pillars are:
 - Sustainable development policy
 - Safety and security
 - Healthcare
 - Natural resources
 - Cultural resources
 - Adventure activity resources
 - Entrepreneurship
 - Humanitarian
 - Tourism infrastructure
 - Image
- ***Costa Rica, Ecuador with the Galapagos Islands and Brazil*** are popular destinations for the European outbound operators offering CBT holidays. Understanding competing destinations will enable better market positioning of your product.

where your country is strongest, where it could improve and how your country scores. Emphasise this in your marketing message.

- Go to the [Travel and Tourism Competitiveness Report](#) of the World Economic Forum for more detailed information about the performance of your country.
- A similar index is available from the Adventure Tourism Development Index (ATDI) www.adventuretravel.biz
- Research other CBT destinations that have a similar offer to your own. Find out what they offer, their pricing policy, how they are presented on their own website and on European tour operator websites and brochures.
- Internet searches of outbound tour operators' websites will identify the destinations that are currently popular in the CBT market.
- In particular study tours to Costa Rica, Ecuador, Guatemala and Brazil: for examples of the type of CBT holidays they organise, the types of accommodation offered, the market segments they are targeting, pricing.

For more information on market competitiveness on the EU+EFTA tourism market in general, refer to CBI's 'Market competitiveness' for tourism.

Useful sources

- Center for Responsible Travel (CREST) www.responsibletravel.org Based in Washington DC, CREST employs policy-oriented research to design, monitor, evaluate and improve the social and environmental commitments of responsible tourism, as well as promote sustainable practices and principles within the wider tourism industry.
- Earth Net – <http://earth-net.eu> - European Alliance for Responsible Tourism and Hospitality, aims to promote the concept of responsible tourism in the world. Go to 'What is responsible tourism' and 'Publications & Resources' for an overview of the trends, ethic codes and other information about the responsible tourism market in Europe.
- Global Sustainable Tourism Council www.gstcouncil.org The international body for fostering increased knowledge and understanding sustainable tourism practices, through diverse programmes of international standard setting, education and training, and accreditation.
- The International Ecotourism Society (TIES) www.ecotourism.org Founded in 1990, TIES is the world's oldest and largest international ecotourism association, a non-profit organisation dedicated to promoting ecotourism. It has a global network of ecotourism professionals and travellers leading efforts to make tourism a viable tool for conservation, protection of bio-cultural diversity and sustainable community development. The network spans 135 countries and there are 500 member organisations and 1,150 individuals.