

What are the European opportunities for community-based tourism products in Myanmar?



Community-based tourism (CBT) is of growing interest to European travellers and tour operators, as it consists of unique, authentic and environmentally and socially sustainable experiences. Myanmar has the opportunity to tap into this trend and diversify its product offer by building on its wealth of local communities and pristine natural landscapes. The success of a community-based tourism initiative depends much on the accessibility, together with the combination of an authentic cultural experience and the natural beauty of the location. Local guides, reliable service and child safety are considered of key importance to the quality of the CBT product.

What are community-based tourism products?

European tour operators that were interviewed define community-based tourism (CBT) as: “a really welcoming, fun, interactive, authentic, hands-on experience (rather than observing) of local life”.

Community-based tourism is regarded as a sub-segment of **cultural tourism**. It aims to be beneficial for both the local residents and the tourists (win-win). It provides visitors with a real and unique insight into local, traditional life. Local residents are directly involved in tourism activities, which creates jobs, and revenues of the services go back into the community. Most tourism destinations attract visitors on the basis of certain tourism highlights, famous landmarks, impressive natural phenomena or historical monuments. However, in the case of CBT, tourists are not drawn in by ‘famous’ attractions; instead it is about normal local people with strong historical ties and ways of living. There are many different reasons why tourists would like to visit local communities, including local lifestyle, local arts and crafts, local food, local farms and produce, local architecture. Tourists like

to see and experience the daily life of local people, so the itinerary should offer possibilities to observe and engage with those community members who are interested in sharing their stories and daily practices with visitors.

Myanmar's culture is one of generous behavior; people display ethical and charitable behavior by giving donations and taking time to volunteer, which is intrinsically linked to the Buddhist religion and lifestyle. Hence, the local people in Myanmar are very familiar with the charitable aspect of supporting a community. However, CBT goes much beyond that.

The two main aspects of CBT from the perspective of a community are that the local community:

- (1) has a substantial level of control over and involvement in its development and management
- (2) benefits that a major proportion of the gains remain within the community.

While tourists want their visit to benefit to the CBT communities, they are looking to achieve this through interactive experiences. As such, CBT is about much more than walking through a community to take some pictures and make a donation. The intention of CBT (and of the European tourists and tour operators) is to develop a shared experience between the tourists and the local people, stimulating mutual learning, and making sure it generates some income for the community. Active participation in tourism planning and management will provide local people with a sense of ownership and responsibility. They will learn new skills in the process and will feel empowered to improve their situation and be proud of their culture and lifestyle. Visitors will experience this unique sense of ownership and pride directly through the tangible enthusiasm and hospitality of their hosts.

Consultation with European tour operators shows there is an increasing interest in CBT experiences as part of a wider trip. The most popular CBT product in Myanmar is the community tour, which can be a tour of a local village or a tour that centres on a specific local agricultural product (coffee, tea, rice). It is generally offered as a day trip, though there is an increasing demand for overnight stays. Community-based tourism products often include elements of cultural, natural and adventure tourism.

You can read more about CBT and the efforts by CBI and the ITC in the highly practical manual [Fresh from the field](#), which bundles best practices from CBT and cultural tourism in Kayah, Myanmar.

With the 2013 'Policy on Community Involvement in Tourism - CIT', the Ministry of Hotels and Tourism formalised community-based tourism in Myanmar. The policy gives communities the opportunity to participate in regional tourism development and decision-making. The first official CBT project was initiated in the Magway region, with 4 communities about 30 minutes' drive from Bagan (source: [Intrepid](#)). Between 2014 and 2017, the number of CBT destinations in Myanmar has grown from six pilot projects, to over 30 destinations (source: Hans Seidel Foundation, 2017).

The Myanmar Ministry of Hotels and Tourism has developed a webpage on which they present [existing destinations and projects that benefit local communities](#) across the country. Some of these are CBT sites, while others are essentially for-profit initiatives by local people or social enterprises. Tourism is considered CBT when the community members participate in the development and management of the tourism product and receive wider community benefit (e.g. through a community fund).

The success of a community-based tourism initiative depends much on the accessibility, together with the combination of an authentic cultural experience and the natural beauty of the location.

Accessibility

European tour operators generally offer community-based tourism products as components of a tour package. Community-based tourism is rarely sold as stand-alone product. European tour operators highlight that they

appreciate community-based tourism products to be located within the proximity of a tourism hub (e.g. Mandalay, Bagan, Yangon, Inle Lake). This way, they can connect community-based tourism offers into already existing trips or offer community-based tourism as day excursions to mass market resort tourists.

Depending on the uniqueness of the community-based tourism product, European tour operators are willing to include travel up to four hours from the tourism hub. The largest share of the market is mostly interested in CBT products as daytrips (or even half-day trips) from the main destinations they are visiting. Once tourists have to travel more than 2 hours, they would likely want to stay overnight. In general, the further away a tourist has to travel from their main travel route and tourism hub for a CBT product, the more special the experience needs to be to attract them.

Authenticity

European travellers are looking for an authentic experience, but what does that mean?

As one experience on their trip, European travellers are looking to get in touch with the “real” world of local people who live in the country they are visiting. Tourists want to experience things that are typical for that area and different from their lives back home. They want to understand what daily life is like and learn more about the local culture. Every village in the world has in some way its own smells, noises and colours; it breathes a certain atmosphere and has something unique as a community. A CBT experience gives tourists a chance to walk in the shoes of the locals for a day or two, to share meals with them and to learn about their daily troubles and how they solve them.

In this experience, a European tour operator highlights it is important that “travellers shouldn't feel like their presence changes or interferes with the behaviour or daily activities of the people that they are meeting and staying with”. For example, in many ethnic communities, local people wear a traditional attire on a daily basis, and they may perform traditional rituals for special occasions. European CBT travellers are interested in experiencing this local heritage.

On the other hand, if local people put on traditional dresses only when tourists arrive, we do not call this authentic; the locals transform themselves into a tourist attraction. A European tour operator clarifies “We want to avoid the whole human zoo aspect, because this is an awful experience for tourists as much as for the local people”. Tourists prefer to meet with local people going about their daily lives in their regular daily clothes.

An authentic experience can best be achieved when the community itself has control over their tourism development and receives income and other benefits from the interaction. CBT offers local populations a chance to tap into the tourism economy; it generates jobs and small business opportunities and it often encourages local people to build on traditional skills and preserve their cultural and natural heritage. In summary, a good CBT product enables travellers to experience the local culture while empowering the communities they visit to preserve their natural and cultural heritage.

Figure 1: Authenticity, ‘real experiences’ are key in successful CBT products



European tourists are interested in local life of the community. As such, CBT integrates well with other sectors of the local economy in the destination. For instance, it can be coordinated with agriculture, in terms of the use of locals' time and resources – having tourists participate in agricultural activities – and in providing markets for local produce. Other local sectors that are easy to combine with tourism include handicrafts and fisheries, and there will be many more that are unique to the local area.

Natural beauty

Although not the most important factor of a good CBT destination, it is an additional pull factor if the community is located in an area with exceptional natural beauty. European tourists may be willing to travel longer distances to reach CBT products in pristine natural landscapes where they can see unique flora and fauna. It is important to them that their visit supports conservation of the environment. This is an area where CBT potentially overlaps with nature tourism. Both globally and within Europe, there is a large market for nature and ecotourism. You can read more about this in our study on [the opportunities for nature tourism in the European market](#).

European tourists are also interested in learning how natural processes, climates and local ecosystems affect the lives of the local people; for instance, how agricultural seasons are determined, or what the effects of climate change are.

Hard and soft CBT activities

There are two types of CBT activities, namely “soft” and “hard” CBT activities. In addition, luxury CBT is a sub-category of soft CBT activities.

Soft CBT activities require little or no experience and ensure low risk. These activities offer tourists a safe opportunity to experience and interact with local people and enjoy the surroundings, while offering general comfort up to European standards (e.g. good quality bedrooms, bathrooms, shower facilities and food).

Examples of soft CBT activities include:

- local cooking and handicraft workshops
- visiting local markets and social projects

- walking tour of the village
- easy bike ride through the landscape
- short hike to a viewpoint or waterfall
- balloon rides, and,
- bird watching.

Naturally, this type of CBT tourism appeals to a wide scope of travellers, signifying a sizeable percentage of trips. As such, this is also where you can expect to see the most growth.

Soft CBT destinations within less than one hour from a tourism hub are in the position to target the general market, who are mostly interested in a community experience of a few hours, half a day or a full day. When the CBT community is close enough, some of these tourists will be interested in traveling there themselves by bicycle (or alternatively by scooter or motorbike). This allows them to experience the countryside landscape along the way, and they can determine themselves how long they stay.

The market for soft CBT products will appreciate travelling up to 2 hours from the tourism hub. In the case of a very unique experience, some tourists are willing to travel up to 3 hours to a soft CBT destination.

As a sub-category of soft CBT activities, luxury CBT initiatives are products targeting higher-end tourists, which means they need to offer general comfort and good services. It is a product based on CBT principles that embraces luxury and offers an exclusive experience, for instance a community managed lodge with high-end facilities. This type of CBT initiative can be considered a sub-category of soft CBT activity. It generally takes a high investment to develop the product, which can be difficult for a community to carry by itself. Hence, at first instance, there is often a collaboration with an investor or benefactor.

Hard CBT activities require greater levels of skill and may incorporate less comfort and potentially more risk for the tourists. These activities offer tourists an opportunity to 'live like a local' as much as possible, even if that means the activity will cause them discomfort (e.g. no shower facilities, local toilet facilities). As tourists are often willing to travel longer distances for these kinds of hard CBT experiences (up to 4-5 hours), the CBT destination needs to be able to accommodate these travellers for at least one night, and in many cases multiple night's stay with the local people. These tourists will also be satisfied with two to three activities per day; however, these can be more challenging activities (e.g. a long hike).

Examples of hard CBT activities include:

- (multi-)day hikes
- mountain bike rides
- caving and homestay in a remote village.

While there may be a smaller percentage of the market that is interested in these kinds of activities, it offers an opportunity to open up CBT destinations. Often this type of CBT takes place in unspoiled landscapes, such as natural parks and forests. European tourists interested in nature and eco-tourism destinations are often willing to accept less comfort, if it means they will have an authentic experience with local people who reside in these pristine natural landscapes.

Urban CBT

The general perception is that CBT needs to take place in rural areas, and this is indeed often the case. At the same time, urban areas can also have great possibilities for developing CBT experiences. An urban CBT experience invites outsiders to focus their attention on the positive sides of a neighbourhood. No matter what challenges a community might face, there is beauty, adventure and culture to be found.

Just like any CBT project, an urban tourism initiative must fully engage the community and directly involve as many people as possible to be successful. Locals involved with urban community tourism initiatives begin to see their own neighbourhood in a different light, as they begin to show and explain to visitors what it is that makes

their community special.

The Dalla community on the outskirts of Yangon is benefitting from a recently established social enterprise called [ChuChu](#). The enterprise produces handicrafts out of waste materials and adds to the community's appeal to tourists. Dalla is attracting mostly independent tourists and some small organised groups on daytrips from Yangon. Although not a CBT project in the full sense (e.g. management decisions are made by the enterprise, rather than the community as a whole), this is an example how a suburban area can tap into tourism opportunities.

Other examples of urban community tourism can be found in the [Thonburi](#) district of Bangkok and [Suphan Buri](#) on the outskirts of Bangkok. Inbound tour operators collaborate with local people and companies in offering tourists an experience of the Thai (sub)urban way of life. Visitors can learn about traditional craft skills and local foods. At the same time, these are also not CBT projects in the full sense, as direct benefits go to selected local people and companies and the community as a whole does not approach tourism in an organised manner.

Developing CBT products

European tour operators often do not have the financial capacity for sending their product managers to scout for CBT projects, thus they rely on local companies to present them with suitable community tourism destinations. They expect the Myanmar tour company (you) to be assertive and take initiative. Before you begin, make sure you understand what the interests and recent developments in their target market(s) are. The key to a successful CBT project is to identify the right location that has something unique to offer (a [unique selling point - USP](#)), which matches these interests of the market(s).

Also ask yourself in what way your CBT product can have added value for the European tour operator and the tour packages they already offer. Remember that a CBT experience is generally one component of a broader tour itinerary. Consider how you can fill a gap, for instance by offering an activity and/or a region that the European tour operator does not offer yet. Do not let it scare you off; you will make a good impression by being assertive and thinking outside of the box.

Before offering the CBT product, make sure the community is able to deliver a quality experience along the lines of handling standards. Also consider the sustainability of the product. How likely is it that local people will remain enthusiastic about tourists visiting their community? Do they want to take a leading role in the planning and preparations so they can manage the CBT independently? Also consider what conditions are necessary for achieving optimum return on investment?

A CBT standard has been drafted for Myanmar, meant to provide a guideline for developing new CBT projects and destinations. These standards should not be interpreted as a rule; they have been developed to provide basic guidance to help establish and operate commercially viable community-based tourism ventures. They are designed for voluntary use. As a Myanmar inbound tour operator (Destination Management Company) or community wanting to establish CBT, these guidelines will provide you with some advice on how to get set up for tourism.

Another useful document to consult is the guide [Fresh from the Field](#) that presents the step-by-step process of the Kayah Inclusive Tourism project as well as the lessons learned along the way. It provides a concise road map of key steps and useful training materials.

Examples of creative CBT itineraries can be found for example with [Green Trails Thailand](#), [Community Homestay Nepal](#), [Pachamama Alliance Ecuador](#) and [Latinspirations](#).

It should be noted that the development of CBT is a learning process for most communities. They acquire many new skills and insights along the way. For instance, they will learn to better understand the types of tourists that visit their community and what their needs and interests are. They will also learn what kind of tourists and tourism development they themselves prefer. It is important that the community members are in the driver's

seat of their tourism development and management.

Case example: Homestay on Koh Trong, Cambodia

On the island of Koh Trong, in the middle of the Mekong River, local woman Vanny and her family are running a homestay. She started operating her business in 2010 and received skills building from a CBT project aiming at developing the Mekong Discovery Trail. Vanny's homestay offers lunch to tourists who visit the island on a daytrip, and she provides lodging for tourists who choose to stay overnight. Her guests include both independent travellers and group arrangements through tour operators. She maintains a high standard of hygiene, as she learned early on that this is the most important to all of her guests. During the years she has been receiving guests, she has learned about other needs and preferences. She wants to provide the best service she can. With the income from her lunch and overnight guests, she was able to set aside money to invest in upgrades of her homestay.

When she got started, her homestay did not have electricity. She ran a light on a battery that she recharged at a local shop in the village on a daily basis. The experiences of her first guests taught her that the tropical climate can be challenging for visitors and that they would benefit from a fan, which she was able to run on her battery. The next lesson she learned was that not all tourists like to stay in one communal room together. She received visits from independently travelling couples, who liked to stay in their own room. She also noticed that it was difficult for elderly travellers to sleep on a mattress on the floor. Therefore, her next investment established two rooms with wooden beds, for which she was able to charge a little bit more. She also maintained the communal space, as she continued to host group travellers.

One day, a resort was constructed on the island, which started to cater a more luxurious experience to tourists. Instead of seeing this new enterprise as competition, Vanny understood this was catering to a different market and would benefit the overall tourism development of the island. She became good friends with the management and took the opportunity to learn some new things. For example, she saw solar panels for the first time and became interested in this way of generating energy. She saved up money to install a solar panel on the roof of her home, to run her light and fan as well as reduce her environmental impact.

Tips:

When designing a new community-based tourism product, keep in mind that the distance from a tourism hub matters. Most tourists prefer to visit a CBT destination within 2 hours of a key tourism site. Tourists interested in hard CBT activities are generally willing to travel a little bit longer; for a unique experience they might travel up to 4-5 hours from a tourism hub.

Respect the local culture of the CBT communities and understand it may differ from the culture of the tourists you will be bringing to the destination. It is therefore important to prepare the tourists for dos and don'ts and also to explain to the local people why tourists may behave in certain ways.

Keep in mind that not all cultural experiences are suitable for tourism, and in many cases clear boundaries will need to be set so that local people feel comfortable having tourists around. For instance, local people might not appreciate visitors observing certain cultural and/or religious gatherings and celebrations, like funerals, while they are happy for tourists to participate in other celebrations, like festivals. It is therefore important that you and your guides have an exceptionally good relationship with the community; one in which they trust you and you understand their personal and communal boundaries.

It is important for tourists to experience many new things – but not too many, because they may get overwhelmed or even scared. An overload will reduce engagement and satisfaction. It is therefore recommended to organise two or three activities per day (e.g. a morning activity, a local lunch and an afternoon activity) and allow tourists sufficient time per activity so they have a chance to engage with local people.

When promoting a CBT experience, be aware of the images you use and the expectation it creates. Although local people in traditional clothing may look attractive, this may not be what they wear on a daily basis and thus it is not what the tourists want to see. Remember that the CBT experience is more about the knowledge that local people have to share or teach to visitors.

What makes Europe an interesting market for community-based tourism products in Myanmar?

Approximately 25% of the EU population participates in tourism outside their home country at least once a year, reflecting many Europeans' appetite for international travel. Online research identified approximately 800+ European tour operators that are actively selling packages to Myanmar at the start of 2020. These include large and medium-sized tour operators, as well as smaller, specialised companies.

In 2018 and 2019, European travellers made up 14% of the total number of visitors to Myanmar with 200,000 visitors (see figure 2). It should be noted that it is not clear how many of these visitors are business visitors and how many are leisure visitors. The majority of these came from Western Europe (13% of tourist arrivals in the country), mainly from France, the UK and Germany. Other important European source markets are Italy, Spain, Switzerland and the Netherlands. Among all of these markets (including business travellers) there is an interest in CBT products. European travellers are increasingly interested in finding creative ways to leave their tour route or packaged hotel and support those locals living in the destination.

The European market plays an important role for the tourism sector in Myanmar, as key segments from Europe are tourists who stay for extended periods and spend a lot of money, and who are interested in exploring destinations beyond the key mass visitation places, including the CBT sites. Despite its relatively small share in the overall number of tourists travelling to Myanmar, European travellers make an important contribution. This reflects similar trends as in other Southeast Asian countries.

The popularity of CBT among European travellers is also reflected in the visitation of existing CBT destinations in Myanmar.

- Local inhabitants of a handful of villages in Myaing Township, nearby Bagan, host tourists on daytrips as well as two-day adventure tours. The overall goal of the project is to establish a tourism destination in Myaing Township that is minimally disruptive to the local environment and existing way of life in local communities, but also allows for increased economic opportunities in a manner that is sustainable, community driven, and implemented in a manner that benefits the wider community as a whole. This first CBT project was initiated with support from Action Aid and the Intrepid Foundation. Between 2016 (when the project began) and the end of 2018, over 1,800 Intrepid travellers visited this quiet pocket of Myanmar. The Myaing project has been recognised within Myanmar as a 'gold standard' in CBT creation and received the first ASEAN CBT Standard certificate in Myanmar.
- In 2014, when the project started, [Kayah](#) state offered almost no activities for tourists. Between 2015 and 2020, the ITC worked with stakeholders to implement a rigorous, step by step process of community consultation, product development and B2B marketing. This included work with local communities, ground handlers and tour guides, national DMC's, and EU tour operators. By the end of 2019, international arrivals to Kayah state had grown by 390% to 12,973 visitors. Kayah's market share had grown by 150%.
- Inspiring new community-based experiences developed by the ITC had been key to this responsible tourism success story. New community-based tourism tours included the chance to experience Pan Pet, homeland of the iconic 'Long Neck' Kayan, and Hta Nee La Leh, an ethnic Karenni community. In 2019, 35% of international visitors to Kayah joined one of the CBT tours. A total of 4,409 visitors enjoyed authentic experiences of local life, culture, and nature in Pan Pet and 3,487 visitors experienced CBT in Hta Nee La Leh.

- These tours generated more than \$35,000 income for village service providers that year, while catalysing additional business by ~\$650,000 or more for Loikaw tourism businesses. Between 2016 and 2019, the value of new business for local Kayah SME tourism suppliers, based only on tour programs that included ITC CBTs, is estimated to be more than \$1.4 million. The project estimates that direct jobs have been created for approximately 100 local community members. Project representatives have estimated that over 80% of guests are European (mainly German, French and Italian). Tourists mainly visit for a half-day or full-day experience, as overnight stay is currently not offered.
- An interesting CBT destination is the trekking route from Kalaw to Inle Lake, as this is established by local private sector initiatives. Most European travellers using this route stay in villages along the route for 1 or 2 nights. Background research for Destination Management Plan for the Inlay Lake Region estimated that approximately 25,000 visitors traversed this route in 2014 (more than 25% of total visitors to Inlay that year), with the large majority being European. A local tourism specialist estimates that the number of visitors on this trekking route per year has likely grown, which has been beneficial to local accommodation providers in the communities. Local guides are still being hired by many tourists; however, the local specialist suggests this has decreased significantly due to clear maps and route descriptions now being available online allowing tourists to traverse the route on their own.
- A relatively new CBT destination is the [Ayeyarwady Dolphin Conservation and Ecotourism project](#) with support from Wildlife Conservation Society. In 2019, 65% of their visitors were domestic travellers. Of the 45% international visitors, about 22% were European, mainly from France and Germany. Most of the European visitors stay overnight at a community, whereas the majority of Asian visitors are there for a daytrip. Average expenditure of the European visitors is estimated at around \$150.
- In the same area, there is the [Living Irrawaddy Dolphin Project](#), a social enterprise that is working with 80 individuals/families from 6 communities, with increases in group size each year based on the number of visitors. The project also set aside \$4 per person per day for a dolphin conservation fund and \$1 per person per day for carbon offsetting. The company has achieved Travelife Partner status, which is an award for sustainable business practice.
- An even newer CBT destination can be found in the Delta, where community tourism is being developed around the Sarus Crane and other grassland and wetland birds with support from Wildlife Conservation Society. Although the site has not been properly promoted, it has been receiving a small number of visitors – including some Europeans – for half-day visits that make use of a local guide.

On long-haul holidays, European travellers generally seek a variety of experiences. In terms of products communities can offer, they are especially interested in soft adventure activities (e.g. walking, hiking, biking) and cultural/natural tours (local cooking and handicraft workshops, visiting local markets and social projects). As a result, CBT elements are increasingly seen as added value to a larger package deal offered by tour operators.

In general, the European markets are mainly engaging in cultural tourism in Myanmar, and to a lesser extent in (soft) adventure tourism. Often this is combined with at least one element of CBT. European travellers are increasingly interested in learning about and interacting with local communities, looking for the unforgettable. As a result, European tourists and outbound tour operators are increasingly looking for authentic experiences which benefit local people.

Europe is a growing consumer market for CBT, as interest for authentic experiences is an increasingly important element for holidaymakers. It is difficult to provide an indication of value and volume size, since no systematic research has been conducted so far. According to industry experts, around 50% of mainstream European tourists have an interest in some aspects of CBT. These include easy-to-access soft CBT activities in the vicinity of tourism hubs. A majority of these type of tourists are looking for daytrips and will be interested in an overnight stay in the community if the lodging offered is of comfortable standard.

For (potential) CBT sites nearby mass tourism destinations, there is a growing market for day excursions to local villages showing traditional economic activities of the culture. An expected 25% of resort tourists would be interested in joining such an excursion.

There is an opportunity to capture more of the luxury CBT market by offering exclusive community experiences

with high-end accommodation. This requires a shift in the standard for the products that are currently on the market. The more luxurious initiatives, such as a community-managed lodge with high-end services, are appealing to approximately 20% of the market. These include mainly senior travellers and young professionals, and a small number of families with children.

An expert gave a very rough estimation of a 2-5% market potential for hard CBT activities among Europeans, which applies to CBT products with basic conditions, such as a home stay within a remote local community with limited resources (e.g. basic toilet facilities, no showers).

Within these groups, there are four major target groups we can identify for CBT in Europe:

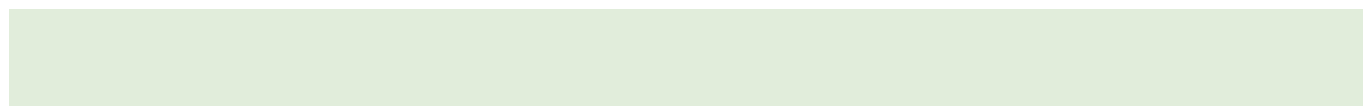
The largest group of CBT travellers from Europe is the [baby boom generation](#) who are about 50 to 70 years old. As travel has become more comfortable and many older and newly retired people have health and wealth, senior citizens are a growing group of tourists. Often retired, these people generally have time and resources available to travel. They are also often less dependent on holiday seasons and are therefore also able to travel off-season. While travelling in Myanmar, they are interested in authentic cultural experiences, like walks through the village, visits to the local market and cooking classes, and soft adventure activities like short hikes, bird watching and boat rides. They do require a good standard of comfort and many among them may be interested in luxury CBT experiences. Safety and accessibility are very important to this group.

Young professionals between 31 and 50 years old often travel in couples and are looking for unique experiences in a comfortable setting. They want to do many different things during a short holiday, so in Myanmar they would like to engage in CBT activities in the vicinity to major hubs, either as a day activity or with one overnight stay. They are looking for unique activities, such as balloon rides, workshops to learn a local handicraft and hikes to an extraordinary waterfall. They do expect some level of comfort, such as good quality bathrooms and shower facilities.

Best known as backpackers and gap year travellers, youth between the ages of 18 and 30 are especially attracted to CBT products as they like to interact with local people and these products are generally cheaper than visits to the mainstream attractions (especially the overnight stay). Many of these young travellers will like to engage in multiple activities and stay at least one night in the community. They will often combine multiple CBT locations on one trip and like to make their travel arrangements locally. Besides visiting the local market, attending a handicraft or cooking workshop, and taking hikes or bike rides through the surroundings, these young travellers also like to engage in local development activities, such as volunteering for a community or conservation project. In this respect, it is of key importance that the CBT initiative is well prepared for the [potential risks that come with volun-tourism](#). For example, to local children and wildlife.

A small but growing group of CBT travellers are families with children. Especially when travelling with younger children, parents will appreciate visiting a community that is family-oriented and where little ones are treasured. Safety is of key importance to this target group, and hygiene and sanitation are also essential. Children often do not have the same physical capacity as adults, and they require tailored CBT activities. Many soft CBT activities, such as a walk around the village and a short hike, can easily be scaled down for children. Families also like to see opportunities for their children to interact with local children from the community they visit, for example in a play garden, a handicrafts workshop or a (football) game. Older children – aged 12 to 18 – will also appreciate more adventurous activities, such as short hikes and bike rides or a scavenger hunt. You can read more about this in our study on explorative tourism for families with children aged 12 to 18.

More information about these target groups can be found in our section on [the opportunities for CBT from Europe](#).



Tips:

The majority of mainstream tourists are looking for daytrips. To tap into this market it is recommended to identify creative ways for tourists to leave their tour route or packaged hotel and support those locals living in the destination. To attract this market, develop half-day and full-day itineraries within a one-hour drive from a major tourism hub.

It is important for European CBT tourists to have transparency about whom their tourism dollars support, as they like the idea of helping a community with limited economic resources. A fair-trade logic applies; tourists want to be sure that they are paying a fair price in exchange for high quality and often unique products and services, within a context of transparency and equality. Inform CBT travellers what your community does with the money it earns from tourism. For example, investing in education or creating jobs for the community.

Note that tourists are looking for a diversity of experiences, hence they will appreciate that every CBT site offers something different and unique to that place. Check what is already being offered and add something that is new; a different experience. European tourists are looking for a unique experience they can only have in this community, learning first-hand about a community's lifestyle and traditions. Develop something with the community that other CBT projects do not offer.

Which European countries offer most opportunities for community-based tourism products in Myanmar?

Europe's major markets for CBT are:

- France
- United Kingdom
- Germany
- The Netherlands
- Sweden
- Belgium
- Italy
- Spain

All of these markets show a high level of interest in CBT in Myanmar. An analysis of over 60 itineraries of European tour operators from the abovementioned countries revealed the following:

- Myanmar is promoted mainly as a cultural destination offering fascinating cultural heritage, a diverse mix of multi-ethnic cultural experiences and stunning natural landscapes. It is also often referred to as an "off-the-beaten-track" experience and "the Asia of 50 years ago".
- All European tour packages analysed mention encounters with the local people, and some refer to experiences with local livelihoods, however only few of these are real CBT. The operators that were interviewed mentioned that it remains challenging for them to identify CBT destinations and projects; they do not know where to find the information.
- CBT is generally offered as part of a mainstream travel package. Most tour operators offer packages around the cultural and natural highlights of the country, with CBT as a small element within a large holiday package.
- With very few CBT products available to date, most operators are offering the same CBT destinations, including the Kayah villages, Myaing township and Kalaw-Inle trek. The Kalaw-Inle trek appears to be the only CBT product offered with an overnight stay in a local family home.
- Very few tour operators offer itineraries that are focused on community experiences as such. Tour operators interviewed explained that tourists like to see the cultural highlights of the country and in addition would like

an authentic local experience.

The public interest in the welfare of local communities and CBT-tourism seems to be higher in the UK, Dutch and German markets. In general, descriptions of (CBT) accommodations are better reflected in the Dutch and UK brochures, which corresponds with the increasing trend of customers growing interest about the sustainability and ethical behaviour of the accommodation they are staying in.

Looking at the three Mediterranean countries – Spain, Italy and France – the concept of CBT is best settled in the French and Italian tourism markets. The CBT product is sold in Spain and Italy as a minor or marginal product, usually in combination with adventure or ecotourism trips. In the French market, CBT is more widely spread across various types of trips and can take a more prominent place on the itinerary. It is very common for the French tour operators to operate cultural immersion, ecotourism or adventure products where the CBT is a part of the service – including lodging, food, porters, folklore encounters. Active tourism, nature sports and open-air activities in general are a key motivation for the French outgoing market. A good number of these kind of activities plus its tourist commercial version (so-called “active tourism”) have been born in France and extended to other countries of Europe, mainly the Southern ones.

There are also opportunities to promote off-season (or better: “green season”) CBT experiences to the European markets, for instance with communities in the dry zone that is less affected by the monsoons or with urban communities. For instance, many Spanish tourists currently have less to spend on vacation and will be looking for more affordable opportunities to travel that can be offered in the green season.

Within Europe, the group of tourists most interested in hard CBT activities can be found in the Netherlands. Tourists from the Netherlands have a relatively high level of interest in holidays that are purely community-based. An increasing interest in hard CBT activities is also observed among tourists from France, Italy and Spain thanks to their explorative nature. Especially Italians love to travel to remote, hard-to-get-to places. At the same time, these markets are less strong in repeat visits, as they like to explore somewhere different every trip.

For Myanmar, France, the UK and Germany, are the largest source markets from Europe. Together they account for 54% of all European trips. These countries also have some the largest populations within Europe. Tourists from all three countries show a high level of interest in CBT.

France: fewer trips with greater investment

While the French are not the highest-spending holidaymakers on the European market, the budget that French tourists dedicate to their trips is slowly increasing. The French tend to segment their holidays into multiple trips throughout the year, with generally a two-week vacation during their summer months. In 2018, 75% of the French planned to travel abroad for their summer vacation, according to the 18th annual European barometer conducted by the Ipsos Institute for Assistance. In 2018, 53 million overnight trips were taken abroad from France. The average length of trips taken was 10.2 days. French travellers appear to be taking fewer international trips but invest more in each trip they take.

UK: sustainability!

Sustainability is becoming a mainstream interest for the UK market, with particular interest in the impact of plastics on the environment and the economic benefit from their travel on local communities. This is according to the UK travel trade association ABTA's Travel Trends Report 2019. ABTA research also shows holidays remain a spending priority, although a continued weak Pound means the desire to get a value-for-money break has strengthened and is reflected in people's choices. As a result, many companies are announcing plans to make holidays more sustainable in the long term. Furthermore, UK travellers will search out experiences that allow them to get an authentic feel for what it's like to truly live like a local. This is an opportunity for CBT products that offer genuine community experiences with great value-for-money, where the benefit to communities is guaranteed.

The study also identified that an increasing number of UK holidaymakers are looking for flexible and tailor-made

packages for a good value break, recognising it is often the best option for price, as well as appreciating the ease and consumer protection that comes with it. The introduction of the new Package Travel Regulations means more travel arrangements become packages – a boost in protection for consumers.

The UK travel industry is also concerned with the effects of tourism on animals. ABTA has launched the second edition of its Animal Welfare Guidelines, featuring new updates including revised basic welfare requirements and unacceptable behaviours. Key elements for Myanmar to be aware of in the new guidelines include the recommendation that it is unacceptable to use elephants for rides, shows, bathing or any other form of tourist contact without a barrier, and the same goes for taking selfies with animals such as monkeys, and feeding captive wildlife.

Germany: relaxation, good food and hiking

Germans love to travel, and many of them can afford to do so. The German economy is Europe's largest and the fifth largest economy in the world. While holidaying within their own country remains very popular (approximately one third of German holiday makers do so), many Germans travel abroad at least once every year or two (the other two thirds). Most Germans want to rest and pass their holidays as relaxed and comfortable as possible, with lots of sunshine and good food. Beach holidays are therefore very popular, but the Germans also like to travel to hilly and mountainous destinations for more active engagements, such as hiking. The summer holiday is the most popular time of the year for Germans to travel. It has been estimated that 75 percent of Germans travel at least once a year and their average duration of travel is 13 days. On average, German tourists spent \$154.74 per day of international holiday, according to a 2018 report Tourism Source Market Insight: Germany by Research and Markets. The German travel market is expected to remain – at least in the very near future – Europe's largest in terms of volume and expenditures.

Germany is a very IT-savvy market. While the majority of Germans still book their travels offline, online and mobile bookings are increasing quickly. In Germany, the demand for ecological tourism and sustainable travel is growing. More and more operators are focusing on holiday experiences that are good to the environment and make both the guest and the accommodation provider happy. In addition, they also find it important to taking care of their own wellbeing. Therefore, wellness is an important holiday aspect. Furthermore, within Germany itself, ample attention is paid to ensure that the disabled too can travel without hindrance.

More information about these markets can be found in CBI's study on [the demand for outbound tourism on the European market](#).

Europe's minor markets for CBT are:

- Norway
- Finland
- Denmark
- Luxembourg
- Switzerland
- Austria

These markets will have opportunities to grow for Myanmar in general and can be attracted to include CBT experiences.

Tips:

When targeting the EU CBT market, focus on 2 or 3 priority countries. It takes time to develop relations and to learn about the expectations of the market. By choosing to focus, you ensure your company understands and meets the needs of these selected markets. At the same time, this will not compromise your chance to increase the appeal to a broader market, as there will be many other

markets with similar interests.

In your communication with (potential) partner companies and clients, highlight the activities or experiences that your destination has to offer that are unusual, less popular or potentially more difficult to get to. Do not talk to them about what they already know and do not offer them itineraries that every other company in the country can and is already offering.

When targeting seniors, note that ageing affects people in different ways. Some of these travellers will be more physically fit than others and some of them may have special needs or disabilities.

What trends offer opportunities on the European market?

A number of developments provide good opportunities for increasing European demand for CBT in Myanmar:

1. CBT as element in adventure packages

An increasing number of adventurous tour operators include CBT elements into their packages. They are willing to stay overnight in a CBT accommodation for one or two nights. They usually travel in groups of 10-20 people. They are looking for soft adventure activities, such as hiking, bird and wildlife watching, (mountain) biking and kayaking, where local guides from the community provide added value to the experience. This, combined with some cultural experiences such as local food tasting, a walk through the village, a visit to a monastery and a visit to the local market, will make a nice CBT package for this market.

2. Immersion and authentic experiences

In addition, the growing awareness of the importance of sustainability and the wish to have an 'authentic experience' during a trip is stimulating European travellers to choose a package deal that includes CBT-elements. One of the major European market trends is the increasing demand for authentic travel experiences, as increasing numbers of tourists seek to immerse themselves in local cultures and environments to generate a greater understanding of the destination and culture. Many tourists are interested in learning more about local cultures of the people in the country they visit. They like to understand and experience the daily life of local people in (especially rural) community settings. The encounters with local community members are essential in the philosophy and the objectives of the CBT product. For tourists, it is a genuine and enriching experience. They get to know the local traditions, become involved in cultural activities and have the opportunity to see unspoiled nature and ecosystems.

3. More experienced travellers

Furthermore, the rising level of education and a subsequent increasing interest in (other) cultures suggests that tourists will increasingly demand a combination of culture and leisure. As Europeans travel more frequently, they become 'career-travellers', continually demanding newer, deeper and more meaningful experiences at the destinations they visit.

4. Social responsibility

Eco-friendly activities are increasingly important to European holidaymakers. Several studies over the years have highlighted that an increasing percentage of European travellers care about "good" and "green" travel. For CBT travellers, social sustainability (concerning local people) is also very important; they want local communities to get a fair share of their tourism expenditure.

In line with these market trends in Europe, and with growing attention for corporate social responsibility, many European outbound tour operators are increasingly showing a business interest in making their tour packages

more sustainable. Community involvement and ensuring that benefits trickle down to community members is very important to them, as they aim at improving their positive impacts on local people at the destinations they offer. In some cases, they are also getting involved in CBT initiatives by providing financial support and advice.

5. Food tourism

Food is a growing global cultural trend and could be an important growth driver for the CBT market. The World Food Travel Association estimates that food and beverage expenses account for 15% to 35% of all tourism spending, depending on the affordability of the destination. All tourists eat and drink of course, but travellers are spending more time and money on unique food and beverage experiences. Food tourism includes a variety of experiences, such as cooking classes, enjoying street food, discovering unique local recipes, touring vineyards and coffee farms, picking herbs and spices, eating at one-of-a-kind restaurants, and many more. These can be a component of a tour package, but there are also tour operators that design tours entirely around food experiences.

Now considered a vital component of the tourism experience, the exploration of local food and beverages can therefore be an appealing pull factor that can draw visitors to CBT destinations. Food tourism matches with the desire for authentic and immersive experiences, as it is defined by the World Food Tourism Association as "the act of traveling for a taste of place in order to get a sense of place". More information can be found at the website of the [World Food Tourism Association](#).

Figure 3: A beach picnic CBT experience



There are also some challenges for Myanmar's CBT growth:

1. Growing negative image over human rights in ethnic conflicts

Politics and human rights are of major concern to the European markets. Europe's negative perception of Myanmar is currently the most challenging risk for tourism growth. Among the European markets, the image of Myanmar appears to be degrading, due to the treatment of Rohingya people and other social and ethnic conflicts. Interviews with eight tour operators from different countries across Europe that have recently stopped selling Myanmar as a destination confirm that demand for Myanmar has decreased significantly among their clientele due to the social and ethnic conflicts. Myanmar's national tourism statistics reflect a strong decrease

from almost 260,000 European visitors in 2017 to just above 200,000 visitors in 2018; a reduction of 22%.

2. Seasonality perceptions

Due to the heavy raining season in Myanmar, some European tour operators mentioned that the travel season for their market is limited. It is known that the raining season causes floods in some key tourist destinations and may present travel delays for tourists. As such, operators avoid planning trips during this season.

3. Limited variation

One of the weaknesses of Myanmar's tourism offer is the limited diversification. The majority of the offer remains culture-based. If Myanmar suppliers fail to diversify their offer to European tourists and keep focusing on the currently known highlights, European outbound tour operators and tourists might lose interest quickly. CBT can offer a solution for diversifying the product offer.

4. Need for online information

The tourism industry is increasingly becoming an information-based industry and is particularly relying on technology supporting information and communication. As a consequence, the eTourism market in Europe is already estimated to count for around 36% of all sales in the travel industry, and it continues to grow. Modern technologies, however, pose significant challenges to community-based tourism businesses, mainly due to a lack of knowledge and exposure, as well as the high costs that are involved. European tourists and travellers tend to want immediate answers to their changing wishes or needs. You can read more about this in a study by the European Commission on [The European Tourism Market, its structure and the role of ICTs](#), as well as the CBI study [How to be a successful company online](#).

Tips:

Approach adventure tour operators and other specialised operators with your CBT products that involve soft adventure activities.

If the community with whom you are developing a CBT product has unique local ingredients, recipes or food habits, you could shape a tourism product around this food experience.

Communicate the specific community experience (e.g. food experience, soft adventure experience, sustainable farming experience, etc.) rather than "CBT". Remember that tourists are looking for unique experiences and will be attracted by something that stands out.

Identify low-risk CBT products for the raining season (e.g. areas in the rain shadow, avoid flights).

Support the CBT community by providing them space to communicate about their tourism product on your website. If they can have a say in how their community is represented, they will feel more connected to their tourism product and your company.

What requirements must community-based tourism products comply with?

Understanding the expectations of the European CBT tourists is crucial to developing a successful CBT experience. We interviewed 23 European tour operators to identify what they consider critical success factors of a CBT product and what is most important for them to offer it to their clients.

European tour operators consider availability of local guides, interaction with local people, reliability of service

and protection of local children the most important critical success factors for a CBT product.

1. Local guides

The most important element of a CBT product for most European tour operators is the availability of a local guide. With local they refer to someone from the community their clients will be visiting. Good local guides can create a deeper understanding of the community and significantly enhance the tourism experience.

2. Interaction with local people

Seeking out meaningful experiences naturally intersects with a desire to meet and interact with locals living in the places that travellers visit. The quality of interaction between tourists and residents contributes to both tourists experience and perception of the visited destination and acceptance and tolerance of tourists by residents.

Also beware of the potential negative impact of tourism on a community. Resentment and poor visitor management damage the visitor experience – particularly when it comes to authenticity – and will cause it to fail.

3. Reliability of service

European tour operators are looking for dependable and accurate performance of CBT service for their clients. Hence, it is of key importance that the CBT destination is able to provide the same quality of service for every tourist who visits. It is also important that you communicate clearly what European tour operators and tourists can expect. Make sure you and the CBT community can deliver upon your promises.

4. Safety of local children

Tourists can impact the lives of children in the communities they visit. Children working and living in tourist destinations (including CBT sites) are vulnerable to physical, emotional and sexual abuse. Various seminars and workshops around issues of child safety in tourism have been held in Myanmar over the years, aiming at raising awareness among tourism industry representatives and police.

The [Child Safe Tourism](#) campaign has listed tips for tourists to help keep children safe. [The Code](#) is an initiative that aims to work with the tourism industry and travellers to prevent the sexual exploitation of children.

Furthermore, hygiene and sanitation, human rights and labour conditions, availability of water and safety standards and risk mitigation are marked as being of secondary importance by European tour operators.

5. Hygiene and sanitation

It goes without saying that European travellers appreciate places that offer sanitary toilets and showers, hygienically prepared food and a clean bedroom with bed linen that has been washed before their use. The existence of highly hygienic and sanitary conditions, as well as good-quality drinking water are of crucial importance for many tourists in choosing a destination. CBT destinations should offer minimal expected sanitary and hygienic conditions. If this quality is not satisfied, the tourists' health will be at risk. Drinking water, sanitary conditions and many other factors can cause tourists to catch a disease. It is imperative that waste is disposed of safely and that water supplies are not contaminated in the process. Local tour companies should have a vested interest and responsibility towards understanding and addressing these issues, and influence local CBT destinations and authorities accordingly.

"Tourism can play a critical role in achieving water access and security, as well as hygiene and sanitation for all. The efficient use of water in the tourism sector, coupled with appropriate safety measures, wastewater management, pollution control and technology efficiency can be key to safeguarding our most precious

resource". See goal 6 of the [UNWTO Tourism and the Sustainable Development Goals](#).

Tourists in many areas actually contribute to water scarcity and inequity, through the overuse of public water supplies, over-exploitation of aquifers, lowering of groundwater tables, and contamination of freshwater by saltwater and sewage. This leads to conflict and resentment among local people and threatens the sustainability of tourism. It is considered of key importance to European tour operators that these situations are avoided in CBT destinations.

Figure 4: The UN Sustainable Development Goals



Source: [Realising Just Cities](#)

6. Human rights and labour conditions

Tourism affects many aspects of human rights, such as the right to information and participation in decision-making processes; protection against discrimination; housing, food, water, health and education; working with dignity; joining trade unions; protection against forced labour and privacy. Human rights and good labour conditions are of key importance to European tour operators, including at CBT destinations.

Tourism also affects various aspects of privacy, such as tourists walking onto someone's private property and peeking through the window of a house, and tourists taking photographs of local people without asking for permission and posting these on social media. It is important to bear in mind the privacy customs of each CBT destination (as these may differ per community) and to ensure that tourists respect local (indigenous) people's

right to this privacy. If your company wishes to promote a CBT product, also make sure you respect the rights of the local people in your messages (e.g. ask for permission before using a picture of local persons on your website or other communication tools).

- For more information, read the ILO guidelines on [decent work and socially responsible tourism](#).

7. Availability of water

Tourism is often a major user of freshwater in areas where water is scarce or where renewal rates of aquifers are limited. Water may be scarce in some destinations and abundant in others. Rainfall and visitation patterns vary throughout the year. The arrival of tourism means that an additional number of people (beyond the local people) require freshwater for a wide range of end-uses, including drinking, hygiene, cleaning, food provision, recreation, aesthetics, and other support services.

In CBT areas, tourists sometimes use more water than local people are used to, including for showering and flushing the toilet. Food is another important issue, because its preparation requires large volumes of water. Indirect tourism-related water consumption should also be considered – for instance a lot of water is needed in cement production for construction. European tour operators want to be sure that their clients' visit does not limit local people in their water consumption. Management responses to water scarcity can be categorised under two broad strategies: demand-side management (reducing water consumption – for example, asking tourists to be careful with water consumption during their stay) and supply-side management (increasing water provision – for example, rainwater catchment areas).

- For more information, check out PATA's publication on [saving water](#).

8. Safety standards and risk mitigation

Health and safety issues are important to European travellers when selecting the holiday destination, especially for seniors and families with kids. They gather information from various sources to form a perception of a particular destination (word of mouth, different forms of media, guidebooks, talking to friends and relatives, specific websites).

Political stability is an essential prerequisite for attracting *tourists (domestic and international)*. *Political instability*, civil unrest, rivalry between tribes/local villages and war can increase the perception of risk at a destination. European tour operators and travel agents can scale back operations, as a result of insufficient bookings or fear of liability suits. Generally, European travellers avoid nations or areas with high crime rates or political instability. Feedback from European tour operators confirms that Myanmar has safety issues and that enquiries have decreased considerably.

Natural disasters may also have an influence on safety concerns. Nevertheless, decreasing visits of independent tourists as a consequence of these occurrences only last for approximately 3 months. However, after violent regime changes, tour operators wait much longer (sometimes up to 2 years) before they put the destination in their catalogue again.

Finally, price stability and compliance with the [EU Travel Directive](#) are considered somewhat important to European tour operators.

9. Price stability

Pricing is a less sensitive issue as CBT tourists are prepared to pay relatively high amounts for authentic experiences and accommodation they consider to be of value to the community. Consequently, transparency is important, so the CBT tourist can see they have made an important contribution. Tourists sometimes book their trips as much as a year in advance. After booking, they are unable to charge clients for any additional costs. Therefore, tour operators appreciate timely price updates.

10. Compliance with the EU Travel Directive

In 2018, the new European Package Travel Directive came into force. This directive protects European travellers' rights when booking package holidays. It applies to both European tour operators and foreign parties selling travel products directly to European travellers. It includes both leisure and business travellers.

- For more information, read our article on [The European Package Travel Directive](#).

Specialised tour operators also place importance on the accessibility for travellers with a disability. This is one of the few factors where Myanmar CBT destinations score very low.

11. Accessibility for travellers with a disability

When you hear the word accessibility you might think of someone in a wheelchair, but there is a wider range of accessibility needs. A large percentage of Europeans travelling to Myanmar are older and may experience some challenges to their mobility. For instance, they might not be able to walk very far, so they would appreciate short walking distances in their itineraries. When hiking, they will appreciate services for transporting luggage, ready-made food on the trail and comfortable lodging. For instance, it will be desirable to have sit-down toilets and an overhead shower (either a pressure or gravity system). Some elderly people might have trouble with steps to enter a building (for instance a house, temple or lodge) and would appreciate a support railing or a ramp.

Families travelling with young children might have strollers with them that make them less mobile, for instance in villages that have dirt roads. Such families may require an adjusted itinerary, as young children may need to take a nap during the day. Of course, there will be travellers with physical (e.g. mobility impaired, hard of hearing, visually impaired) and/or mental (e.g. autism) disabilities and when targeting these groups, their specific needs should be discussed with the tour operator.

- For general tourism requirements, see [what requirements your services should comply with to attract European tourists](#).

Community-based accommodation

Before offering an overnight experience as part of your CBT product, make sure you understand what the tourists you are targeting expect and assess whether the community is able to offer this. The European tour operator(s) you are (planning on) partnering with can provide you with insight into this. Then make sure you check whether the community has the capacity to deliver upon these expectations consistently. Communities are not always able to deliver the right quality standard.

Comfort is important to families and older tourists, in terms of accommodation. In addition, they expect a private room with a comfortable bed, a sit-down toilet and a shower. Breakfast should be included, and most European tourists will prefer fresh fruits and bakery products. They will appreciate small-scale lodges with a personalised approach.

Families with children will appreciate safe facilities where their children can play, such as an indoor or outdoor playground. In warmer climates, children will generally really appreciate the availability of a pool. Note that any pool or playground needs to have high safety standards for children that visit a community as tourists. In addition, parents will appreciate visiting a community that is family-oriented, which means that the community members care for their own children and will do the same for the visiting children.

As mentioned before, there is market for Europeans that are willing to stay at basic accommodation facilities, though it is small. This can be an opportunity for new CBT communities that might not have the capacity to deliver the right quality standard to live up to the demands of the mainstream markets to gain experiences and develop their accommodation facilities over time. It is also an opportunity for those CBT communities in remote locations, where general standards of living and hygiene and sanitation standards might be lower.

Tips:

Having knowledgeable and communicative guides from the local CBT community is an advantage over guides from other communities. Ensure you work with a local guide from the CBT community, who can tell tourists all about the local lifestyle, history, and contemporary heritage. As this guide will represent your company, you will want to train them properly.

Combine soft adventure activities (e.g. walking, cycling, hiking, boating) and interaction with local people (e.g. local cooking or handicraft workshop), if you would like to offer a full day or multi-day CBT experience. On long-haul holidays, European CBT travellers generally seek a variety of experiences.

Ensure you – and especially your guides – have good knowledge of the CBT destination and the local culture, flora and fauna. European CBT travellers rely on you for this.

Share the [Myanmar Tourist Dos and Don'ts](#) with your clients before arrival, as well as some words/sentences for travellers in the local language.

If you need to interact with a person with disabilities, then speak directly to that person, in the same way that you would speak to any other tourist.

Be aware of the level of comfort your tourists are expecting from their accommodation and ensure your offer is appropriate.

Ensure that it is clear what standards of accommodation the tourists can expect.

What competition do tour operators in Myanmar face on the European market?

In general, competition in the CBT market does not differ much from the overall tourism market. For any destination to become successful, it will need a sound combination of unique local resources (such as cultural heritage, scenery, flora and fauna and climate), and the ability to cater for visitors (such as tourism infrastructure, service standards, quality of management skills).

For CBT destinations, tourist involvement (such as interactive experiences with local people, learning local skills like handicrafts and cooking) is a major contributing factor. In addition, the attitudes of local residents towards tourism also have a significant influence. Positive attitudes will display hospitality and make tourists feel welcome. Negative attitudes towards visitors, mistrust in the tourism development or apathy of local people will directly affect the experience tourists have in the community.

According to industry experts, popular CBT destinations in Asia include:

- Thailand
- Indonesia
- Laos
- Vietnam
- Cambodia
- Kyrgyzstan
- Mongolia

These can naturally be considered CBT competitors for Myanmar. Many of the above countries have been engaged with CBT products much longer than Myanmar has, and CBT has become well institutionalised through CBT umbrella associations and CBT networks. These umbrella organisations give communities the opportunity to learn from each other, offer a joint platform for communication and promotion, and often include several

other functions.

The future success of Myanmar's CBT products is very much linked to the development of tourism infrastructure to enable accessibility within an acceptable time frame (up to 2 hours from a tourist hub for daytrips, and up to 4 hours from a tourist hub for overnight stays). Currently, Myanmar's tourism infrastructure ranks behind other popular Asian destinations such as Thailand, Vietnam, and Malaysia.

At the same time, Myanmar is able to offer plenty of off-the-beaten-track travel experiences within the vicinity of key tourism hubs and is home to a large diversity of ethnicities and cultures. Tourists will not need to travel far to experience unique communities, both rural and urban. Interviews with European tour operators show that current community experiences offered in Myanmar score well in terms of friendliness and hospitality, hygiene and sanitation, accessibility and availability of local guides. These are competitive advantages that should be highlighted and built upon.

Key to the CBT experience is the relationships tourists form with local people. There are many possibilities for developing new, unique CBT experiences that can target specific interest markets, such as families with children and disabled people, or opportunities for exchange between artists or producers.

Furthermore, the involvement of and benefit to the community members is also important for CBT. It is the local people that form the core of the CBT product. In many cases around the world, local residents of tourism destination have found themselves left out of the decision-making and investment process, and they have limited opportunities to gain from the benefits. As a result, these CBT products failed to become a success because local people displayed negative attitudes towards tourists and tourism developed in an unsustainable manner, damaging natural resources, ruining sites of heritage and degrading the communities.

Another reoccurring pitfall among CBT projects is copy-cat behaviour. Many CBT projects try to copy the success story of other CBT destinations. And when they fail to attract visitors, they wonder why. While some elements from other, perhaps already successful, CBT sites can be used as examples and to some extent replicated, each community is unique and therefore needs a tailored approach to establishing CBT.

Tips:

Build on Myanmar's competitive advantages for community tourism, including friendliness and hospitality, hygiene and sanitation, accessibility and availability of local guides.

In your marketing messages, emphasise those Myanmar CBT elements that holidaymakers cannot find in competing countries.

Focus on specific product market combinations within the source markets you have selected to target, as there is a lot of competition out there.

Recognise the uniqueness of a community and build the CBT product around that, rather than trying to bend the community in a direction that does not align with their perspectives and needs.

Through what channels can Myanmar tour operators best reach the European market?

Supply chains – as sets of networks – help tourists find what they are looking for. Myanmar travel companies fulfil a central function so it is important that they are involved in the rural community tourism development process, mostly for their knowledge of what certain groups of tourists may like or dislike. As intermediaries, the

role of travel companies is a delicate one, since they have to make clear to potential tourists that a visit to a local community includes certain responsibilities. As such, these companies themselves should know about local situations.

Basically, there are two types of customers: the traveller and the tour operator.

Distribution through tour operators still dominates.

The European tour operator

Incoming Myanmar tour operators play a very important role in both general tourism and CBT. Since CBTs are often small and locally-based providers, European tour operators often do not have the capacity to cooperate directly with them. They prefer to work with a local contact organisation (usually an incoming tour operator) that handles all the local communication, payments and handling services. Such local contact organisations are also much better at guaranteeing that a community can provide good quality services, will follow up on agreements, can handle reservations and is close to the route that existing trips already use. Some tour operators work together with NGOs that provide them with information on interesting CBT initiatives for their trips, but they will rely on local tour operators to make contact and reservations. Also, missing formal tourism insurance policies from the communities might lead European tour operators to do business with an intermediary instead of having direct contact. In short, a local tour operator plays a key role in the trade channel to the European market.

While tour operators are prevalent in all European countries, they are particularly dominant in Southern and Eastern Europe, where the tourism market still has a traditional structure. In Northern and Western European countries, where the most interesting markets for Myanmar are found (see section below for more information), there is also a sizable portion of the market that travels independently.

European tour operators interviewed prefer being contacted by email, especially with information about new CBT opportunities or new product offers in existing CBT locations. Besides the information about the product, European tour operators are interested to learn about ways in which the product minimises the impact on the environment, how human rights and labour conditions are guaranteed, and what measures are taken to ensure child safety.

After sending an email, it is advisable to follow up over the phone. This way, you can make sure your message has reached the responsible person in the company and offer them the opportunity to ask questions. It is advisable to not be pushy about your itinerary and your desire for collaboration. This will be perceived as a negative and will get you nowhere.

Other ways in which European tour operators can be contacted is during travel trade shows. Although they are overwhelmed with information during such events, they will remember you if you have shared with them a really unique CBT itinerary. Many representatives of European tour operators will plan their meetings in advance of the event and contacting them via email or over the phone at least two months before the event is recommended. That way, you will have a scheduled meeting and will not miss the opportunity to sit down and talk to the company representative.

The inbound tour operator

Beyond European tour operators, also inbound tour operators (DMCs) in Yangon can be a potential target group for your CBT itinerary. These can be reached via email or over the phone and they will also be interested to meet with you if you can share a unique CBT itinerary with them.

There are three possibilities for European and inbound tour operators to offer CBT experiences:

1. CBT integrated into a package

The CBT experience is in many cases one aspect of a broader tour package. As mentioned before, the majority of the market is interested in a CBT experience, so your itinerary might be integrated with a cultural tour or a luxury package, but it can also be combined with specialised trips like a golf tour, wellness package, culinary experience, or business trip. The order of a tour package and the timing of the CBT visit is important. For instance, it would not make sense to take tourists to Kayah after they have been to northern Myanmar. Furthermore, CBT provides the tourists with an authentic experience, but it is generally not the climax of their package tour.

2. CBT as a short module

The CBT experience can also be offered as an excursion option by tour operators who work with building blocks that allow tourists to put together their own tour package. In this case, the CBT can be offered as a half-day, full-day or multi-day excursion.

3. CBT as an add on

Many European tour operators may like to offer CBT as a short module that tourists can choose to add onto their trip. In this case, the CBT experience is offered as optional. It will then depend on the time availability of the tourist and their interest in the CBT itinerary, whether they will choose to add it or not.

The traveller

A growing number of tourists are travelling independently. Increasing access to online information is making it easier for experienced travellers and those on a budget to find their own way to a destination country. A growing number of European travellers increasingly book their holidays directly with service providers at the destination. This means they bypass their local tour operators and travel agents. Especially younger travellers (between the ages of 18 and 45) are particularly likely to book directly with local providers.

For many European tourists who like to travel independently, it can still be difficult to find CBT initiatives and virtually impossible to book a tour with them. This is where the Myanmar tour companies can play an important role. To increase your chances of direct sales, you can promote your product on CBT-related websites/portals like [Tourism Concern](#) and [Responsible Travel](#). Also consider developing your own national or regional CBT portal. Some examples are [CBT Vietnam](#), [Community Homestay Nepal](#) and [Pachamama Alliance Ecuador](#). Furthermore, you can offer CBT itineraries to tourists at key destinations (hubs) in the country. Some travellers do not plan their full trip in advance and will be looking for interesting opportunities while they are already in Myanmar.

Table 1: Demographics and Travel Motivations of the CBT Traveller

Age Group	Personal Situation	Travel Motivation	Travel style
Age 50+	Time Rich, Cash Rich	Seeking a Unique Experience	Largest group. Well-educated, wealthy, moving into retirement, like to combine authenticity with luxury, prepared to pay for an experience.

Age 30-49	Cash Rich, Time Poor	Desire for authenticity and to give back to communities	Well-educated, well-travelled, family groups and couples, variable disposable income, authenticity and pricing key.
Age 18-29	Time Rich, Cash Poor	Personal fulfilment, supporting communities, volunteering	Young people taking time out to travel and/or volunteer, pre-family groups, limited budget to travel, keen to learn new things.

Source: Acorn Tourism Consulting

Tip:

Read more about the channels, including OTAs, in the [CBI study Entering the European market for CBT tourism](#).

European business etiquette

Business is about people and communication. It is important to understand the professional behaviour of Europeans, as they have certain expectations from their inbound partners. There is no shortage of competent and reliable people in the business world and manners can make the difference. If you do not perform according to a professional behavior, you might lose business to your competitor.

Always respond to emails and other communication from European tour operators as soon as you can, or at least within 1-2 days. In Europe it is considered professional to provide a response at your earliest convenience, even if you have to let someone know you need time to provide an answer to their question. Being punctual and responsive shows others that you value their time. Just remember not responding is worse than mentioning you do not have the required information yet. If available, you can start by sharing an estimate and letting them know the number of days it will take you to find out the actual cost.

Marketing messages

The ways in which tourists experience, consume and share information continue to undergo significant changes. Both traditional and rapidly emerging markets have high expectations of digital and social media communication with authentic and responsible messages.

Realisation of Community Based Tourism opportunities relies, to a large extent, on marketing activities that make potential tour operator partners and visitors aware of the available opportunities and that match demand and supply. Operators and visitors need to have realistic expectations and an understanding of tourism experiences to help them choose a product that is suitable to their needs and the experiences they desire.

It is important to establish a balance between the expectations of tourists and hosts, and your communication should carry a clear message in this respect. This means that your message should not provide what you think tourists may like to hear (this will be seen as advertising and propaganda); rather it should contain a realistic reflection of what the community looks like, what local livelihood is like and what the activities tourists can carry

out there. It should be made clear that this is about responsible tourism and that tourists also have certain responsibilities.

In promotional images it is important to reflect the CBT destination and its local people as they are. For instance, if local people do not wear traditional dress on a daily basis, it would be inappropriate to reflect them that way in promotional images.

Note that many tour operators and especially tourists will not be familiar with the term Community-Based Tourism. In some countries tour operators will be more familiar with ethical travel or experiential travel. Generally, it is better to avoid the term CBT altogether. Instead, your communication will attract most attention if it can describe the experience people should expect: the smells, sounds, and tastes that will await them, activities they can do, engagement opportunities with local people they can look forward to, and the feelings the experience may provoke.

It will also be helpful to incorporate in your message in what ways the community benefits from the visit of the tourists.

Tips:

When communicating with European tour operators, be transparent and clear, and keep your message concrete and short.

The way to stand out and make a good impression is by sending information and sharing an itinerary that is new and different. Do not tell them what they already know and do not send them itineraries they can find with every other company in the country.

When receiving a CBT itinerary, European tour operators are interested in information about environmental preservation, fair income for the host community, child safety, and how the CBT product is set up sustainably.


Present your CBT itineraries to smaller, more specialized tour operators, such as the members of the Dutch Vereniging van Kleinschalige Reisorganisaties (VvKR), and attend specialised trade fairs, such as ATTA's [Adventure Travel World Summit](#), [Pure Life Experiences](#) focusing on luxurious experiential travel, PATA's [Travel Mart](#), and various adventure travel fairs in France.


Create a short and clear name for your itinerary that is written in proper English. Long names are confusing and cannot be used for sales. You will need to find words that truly reflect your authentic package in a memorable way. Keep in mind also the audience you would like to attract; younger travellers respond to different marketing messages compared to senior travellers or families.

This study has been carried out on behalf of CBI by [Marjorie van Strien](#), ECEAT

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