CBI Tailored Study:

Cultural Tourism to Mongolia
TABLE OF CONTENTS

1. INTRODUCTION 3

2. THE CULTURAL TOURISM PRODUCT IN MONGOLIA 3
   2.1 Introduction
   2.2 Mongolia’s Tangible Culture
   2.3 Mongolia’s Intangible Culture
   2.4 Inbound Tour Operators
   2.5 Best Practice in Sustainable Cultural Tourism
   2.6 Expectations of International Outbound Tour Operators
   2.7 Regional Competition
   2.8 Summary and Recommendations

3. KNOW YOUR MARKET 10
   3.1 Introduction
   3.2 The Visitor Journey
   3.3 Visitor Expectations of Authenticity
   3.4 Market Size
   3.5 Consumer Expectations – Research Findings
   3.6 North American and European Visitors
   3.7 Japanese Visitors
   3.8 Russian Visitors
   3.9 Summary and Recommendations

4. SUSTAINABLE DEVELOPMENT 26
   4.1 Introduction
   4.2 Sustainable Certification Schemes
   4.3 Why Is Certification Important?
   4.4 International Sustainability Guidelines
   4.5 International Certification Schemes
   4.6 Country Based Ecotourism Certification and Accreditation
   4.7 Organisations and Associations
   4.8 International Best Practice Case Studies
   4.9 Tour Guides
   4.10 Educating Visitors
   4.11 Guidance for Establishing Community Based Tourism Businesses
   4.12 Considerations for Action

5. RECOMMENDATIONS FOR DEVELOPING CULTURAL TOURISM 40

ANNEX 42

1. Tours Offered by Inbound Tour Operators
2. Sustainability Certification Criteria for Community Tourism
3. General Performance Standards for Eco-Cultural Tour Guides
4. GSTC Responsible Travel Tips
5. General Guidance for Establishing Community Based Tourism Businesses
6. Sources for Social Media Analysis
1. INTRODUCTION

Objectives of this study are to establish the types of cultural tourism products that appeal to the visitors (particular those from France, Germany, Japan, Russia and the USA) and how the cultural tourism offer in Mongolia can be developed along international recognised sustainable tourism guidelines to bring greatest benefit to local communities in remote and rural areas.

The Methodology undertaken to deliver this study was based on desk research and consultations with Mongolia’s inbound tour operators to establish the current cultural tourism product and how it is presented to the international market. Desk research was also used to identify suitable sustainability guidelines and best practice case studies.

An analysis of the social media in North America, western Europe, Japan and Russia was used to understand the interests and views of independent travellers and what they expected from a cultural trip to Mongolia. This research was supported by tour operator interviews in Russia and interviews conducted in Europe, the USA and Japan for the Mongolia Tourism Tailored Intelligence Study undertaken by Acorn for the CBI in 2013.

This report presents the findings of the research. Section 2 reviews the cultural tourism product in Mongolia and how it meets the needs of the international trade. Section 3 provides detailed insights into the views and expectations of independent travellers. In Section 4 an assessment of relevant sustainable tourism guidelines provides a resource for the future development of a sustainable cultural tourism strategy.

The conclusions of this body of research are presented in Section 5 together with proposed actions for the future development of Mongolia’s cultural tourism product.

2. THE CULTURAL TOURISM PRODUCT IN MONGOLIA

2.1 Introduction

The types of cultural tourism products that visitors are interested in experiencing in Mongolia can be grouped into two categories:

a) Tangible ie, built heritage
b) Intangible ie, community based, living heritage

Examples of each of these types of Mongolian cultural heritage are shown below.

Figure 1: Examples of Cultural Heritage

<table>
<thead>
<tr>
<th>Tangible Heritage</th>
<th>Intangible Heritage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Archaeological sites</td>
<td>Landscapes</td>
</tr>
<tr>
<td>Architectural ruins</td>
<td>Living heritage:</td>
</tr>
<tr>
<td>Buildings</td>
<td>- Nomadic culture and customs</td>
</tr>
<tr>
<td>Monuments</td>
<td>- Experiencing traditional lifestyles</td>
</tr>
<tr>
<td>Museums</td>
<td>- Events: Traditional festivals and fairs</td>
</tr>
<tr>
<td></td>
<td>- Oral traditions</td>
</tr>
<tr>
<td></td>
<td>- Music</td>
</tr>
<tr>
<td></td>
<td>- Art and performing arts</td>
</tr>
<tr>
<td></td>
<td>Handicrafts</td>
</tr>
</tbody>
</table>

This section reviews Mongolia’s tangible and intangible cultural offer and how some of the most proactive inbound tour operators present it to the international market. Examples of best practice community projects are identified. The cultural tourism offer is then compared with the expectations of international outbound tour operators and recommendations made about how the cultural tourism product could be developed to meet the needs of the market.
2.2 Mongolia’s Tangible Culture

The majority of Mongolia’s tangible culture is located in and around Ulaanbaatar. These are the sites that are most frequently visited as most trips to Mongolia start and finish in Ulaanbaatar.

The key sites that are visited by tour groups and independent travellers in and around Ulaanbaatar are:

- Bogd Khan’s Winter Palace
- Choijin Lama Museum
- Gandan Monastery
- Mongolian Art Gallery
- National Museum of Mongolia
- National History Museum
- Natural History Museum
- Sukhbaatar Square
- Zaisan Hill Memorial
- Zanabazar Museum of Fine Art
- Chinggis Khaan Statue complex at Tsonjin Boldog
- Manzushir Monastery at Bogd Khan National Park

Outside Ulaanbaatar visitors are interested in visiting the monasteries and sites connected with Chinggis Khan. The key sites visited are:

Central Mongolia:
- Erdene Zuu – the first Buddhist monastery
- Karakorum – Chinggis Khan’s ancient capital of the Mongolian Empire, museum
- Orkhon River Valley – UNESCO World Heritage Site
- Tuvkhun Monastery

Karakorum, the ancient capital of the Mongol Empire is the most visited site.

Southern Mongolia:
- Khamar Monastery
- Ongi monastery ruins

Eastern Mongolia – the homeland to Chinggis Khan
- Deluun Boldog – birthplace of Chinggis Khan
- Khan Khentil – strictly protected area (homeland of Chinggis Khan)
- Gurvan Nuur – Chinggis Khan Monument

Northern Mongolia
- Amarbaysgalant Monastery
- White Palace of Tsogt – ruins

In Western Mongolia there are no significant built heritage sites.

Due to the size of Mongolia and the majority of its tangible culture being located in and around Ulaanbaatar, visitors that are only on short trips to Mongolia, or those that do not want to travel long distances are most likely to experience more of the country’s tangible culture than those that are spending most of their trip outside the capital and travelling further afield.

Visitors taking shorter trips to Mongolia will tend to be either expatriates working in the region or regional visitors from countries such as Japan or Russia. For example the average length of stay for Japanese visitors is 8 to 9 days compared to around 3 weeks for North American and European visitors.
2.3 Mongolia’s Intangible Culture

Mongolia’s natural landscape, its living culture and the traditional nomadic way of life are central to the country’s appeal to visitors and are its USP, its Unique Selling Point. The challenge for Mongolia is to find ways in which tourists can experience this living culture in a way that for them feels authentic, rather than being a culture on display, and where the tourist experience also contributes positively to the nomadic communities, rather than harming the balance of their nomadic lifestyle.

Once outside Ulaanbaatar, the natural landscape becomes the main attraction for visitors. In Central Mongolia, closest to the capital, the national parks are the main attraction. Due to their proximity to the capital, these national parks receive higher visitor numbers than the landscapes in other regions of the country, with the Gorkhi-Terelj National Park being the most developed. In the South, the Gobi Gurvansaikhan National Park is also a popular tourist destination, although development is mostly concentrated in one area, Yoliin Am.

The ‘visitor offer’ is also more organised in these national parks, with resorts and ger camps offering a range of outdoor activities including: 4x4 driving, biking, bird watching, camel riding, camping, fishing, hiking, horse riding, kayaking, rafting, wildlife viewing, yak cart travelling. In Terelj National Park there are also two golf clubs and opportunities to ski.

Visitors also want to experience the nomadic culture. The nomadic lifestyle is intrinsic to Mongolia and its way of life. It was born out of necessity as herders needed to move their animals over the steppes in search of grasslands. Although many Mongolians have now moved to the city in search of work, many choose to stay on the land with their animals, with the freedom and independence the traditional lifestyle offers. The rural population still accounts for around 40% of the population.

It is the continuity of this living culture that so appeals to tourists; the felt and canvas ger tents that provide shelter and the animals, the sheep, goats, cows and horses that provide food, milk, fuel (from dung) and transport. Finding a way to experience this lifestyle, with its close interaction between the landscape and animals, is what most tourists are searching for, at some level, during a trip to Mongolia.

This experience is partially provided by staying in a ger camp. The majority of the camps in the national parks are permanent and designed to accommodate western comforts to some extent. Interaction with local nomadic people is a feature of most, if not all, organised tours to the parks.

In more remote regions of the North, South, West and East, a similar range of outdoor activities can be undertaken. Activities such as trekking, horse riding and camel riding may be organised more closely with local guides and nomadic communities. The level of ‘authenticity’ of these nomadic culture experiences is therefore considered to be closer to the traditional way of life and less disturbed by the influence of tourists.

Festivals and events are also a popular way for visitors to experience Mongolia’s traditional way of life. The best-known festival is the Naadam Festival that takes place in July. This has now become very popular and is considered over-commercialised by both tour operators and independent visitors who recommended experiencing Naadam outside Ulaanbaatar in more rural and less busy environs. Other festivals have also become popular in recent years.

The festivals that take place in remote areas, for example the Golden Eagle festival in Western Mongolia provide visitors with the opportunity to experience more closely the traditional way of life, they can stay with nomad families and take part in more traditional outdoor activities with local people.

Figure 2: Events and Festivals in Mongolia

<table>
<thead>
<tr>
<th>Month</th>
<th>Events and Festivals</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>New Year’s First Sunrise</td>
</tr>
<tr>
<td>February</td>
<td>Lunar New Year – Tsagaan sar</td>
</tr>
</tbody>
</table>
| March | Ice Festival  
International Skating Event  
Thousand Camels Festival |
| July | Tsaantan Festival  
Naadam Festival  
Mongolian National Costume Festival  
Tea Festival  
Yak Festival |
| August | Mongolian Horses Festival  
Mongolian Bike Challenge |
Outdoor activities are an intrinsic part of a trip to Mongolia. Once outside Ulaanbaatar cities are few and far between and the appeal is to experience the country’s exceptional natural culture by undertaking outdoor activities and encountering the nomadic way of life.

The heritage of **hand made crafts** is deeply rooted in Mongolian culture and is a vital part of nomadic daily life. The production of hand painted furniture, cashmere, the embroidery which adorns the gers, and felt making for tent insulation, clothes, boots and much more, are of interest to tourists who want to know how they are made. The sale of these products, some of which are produced in and around the ger camps, generates an important source of additional income for nomadic communities.

### 2.4 Inbound Tour Operators

There are 450 inbound tour operators in Mongolia offering a wide range of tours, although only around 13% of them (less than 60 companies) are proactive in the international market. Of these five of the most active inbound tour operators, that attend international trade fairs such as ITB and WTM and present the Mongolian cultural tourism product to the international outbound tour operators, are:

- Active Adventure Tours/ Tour Mongolia [www.tourmongolia.com](http://www.tourmongolia.com)
- Great Genghis Tours and Expeditions [www.greatgenghis.com](http://www.greatgenghis.com)
- Juulchin Tourism Corporation of Mongolia [www.juulchin.com](http://www.juulchin.com)
- Selena Travel [www.selenatravel.com](http://www.selenatravel.com); [www.mongolia-tours.com](http://www.mongolia-tours.com)
- Tsolmon Travel [www.tsolmontravel.com](http://www.tsolmontravel.com)

An analysis of the cultural tourism product these companies offer, based on information provided on their websites and in their brochures, shows around 40% of all tours being marketed are cultural tourism tours, of which 28% were promoting intangible culture. The majority of other, non-cultural, tours were adventure trips that may also include cultural elements. Figure 3 shows the proportion of cultural tours offered by these companies compared to all tours. The analysis of these tours is detailed in Annex 1.

**Figure 3: Proportion of Cultural Tourism Tours Compared to Other Tours**

The tours offered by these companies included a mix of standard cultural and adventure tours and special interest holidays. Three of the companies included details about visits to nomad families and two gave fuller details of their approach to responsible tourism and their relationship and commitment to supporting nomadic communities.
2.5 Best Practice in Sustainable Cultural Tourism

Visitors who want to support local communities can visit initiatives that benefit sustainable livelihoods and nature protection. This provides the visitor with an understanding of the nomadic lifestyle and the issues involved in sustaining it, as well as providing an opportunity to engage directly with local communities and see the direct benefit their contributions can bring. Some examples of these initiatives include:

Rich Mongolia

Nomadic families who want to increase their household income receive a herd of sheep to breed and tend based on best practice of pastoral animal husbandry. The project has been running since 2007 and so far 500 sheep have been donated to nomad communities. This encourages herders not to leave their nomadic lifestyle and move to the cities.

Nomad Library

The Nomad Library project was established in 2008 and is intended to reduce educational poverty by providing books to Mongolian children in the countryside who may otherwise not have the opportunity to access a library. The library is in a Ger and travels to the children though the Tuv, Bulgan, Khentii provinces. It stops for a few days around central villages or the summer places of nomad herders. The books in the library help children to learn more about, and take pride in, their own culture as well as learning about the environment and ecology. Travellers can visit the library and volunteer to teach English to the children.

Children’s Eco Club: Khuvsgul, Bayankhongor, Bulgan, Khentii

Eco clubs create awareness among children and teenagers about the protection of nature and get them actively involved in projects that increase their understanding of ecological and environmental issues. These clubs are active in the provinces of Khuvsgul, Bayankhongor, Bulgan and Khentii. The project has been active since 2008 and visitors can contribute and visit the clubs.

Handicrafts

Community based projects have established handicraft projects and musical projects such as Nomadic Melodies, which keeps alive traditional sounds. These handicraft and arts projects are of interest to visitors and small numbers of inbound tour operators offer tourists the opportunity to meet communities and see how these traditional skills are used. However there are currently very few opportunities for visitors to visit these projects, which help to sustain traditional skills and spread the value of tourism to local communities.

Gun-Galuut Festival

In 2004 Mongolian inbound operator Selena Travel worked with the nomadic community in Tuv to found and establish a nomadic cultural festival, recognised by the Mongolian Ministry of Nature, Environment and Tourism in 2007. In 2008 the festival attracted 300 locals, nearly double the local attendance in 2007 and 65 international visitors. The festival, which would not exist without tourism, fosters the local culture. Selena Travel has worked with the nomads to develop itineraries around Gun-Galuut making a significant difference to local livelihoods. Other festivals, which are directed to the cultural preservation and local livelihood include:

- Western Mongolian Folklore Festival [http://ottour.com/orad-tumen-naadam-festival/]
- Eastern Mongolia, the Altargana Cultural Festival which is famous in Buryat, Russia. [http://www.travelsmongolia.com/en/camel-festival/]

These festivals are becoming increasingly popular with visitors who want to experience traditional events that are less commercial than Nadaam in Ulaanbaatar.

2.6 Expectations of the International Outbound Tour Operators

The research undertaken with Japanese and western tour operators for the Mongolia Tailored Intelligence study in 2013, highlighted the key factors that outbound tour operators require to sell more cultural tours to Mongolia. Outbound tour operators are looking for local partners that are reliable, responsive and can deliver a tour that meets the needs of their clients. This involves inbound tour operators providing:

1 [http://www.selenatravel.com/115/gun-galuut_nature_reserve]
• Expert knowledge about the product they are selling
• A tour that is different from the standard tours offered by inbound tour operators
• Specialist tours that offer engagement with the nomadic communities and also meet niche market interests such as bird watching, fishing, horse riding, photography, off season activities, specialist wildlife and species that can be seen in their natural environment, flora and fauna
• An understanding of the needs of clients so they can advise the outbound tour operator about the types of tours that best match their clients interests and levels of comfort
• The necessary licenses and insurance
• Information on the company’s environmental policy and possibly their approach to responsible tourism and benefiting local communities.

Mongolia’s uniqueness is based on its natural environment. Although outbound tour operators do not expect suppliers to have sustainability certification, they are increasingly promoting their own responsible tourism values, particularly to natural destinations such as Mongolia. Therefore they value knowing that a supplier has an environmental policy that it adheres to.

The importance of managing the environmental impact of tourism is highlighted by comments made by outbound tour operators:

What actions would you like to see Mongolia take to make it more attractive to your clients?

• All tour operators (no matter the size) being forced to take their litter with them or being fined.
• Better patrols/signage of protected areas to prevent people from lighting camp fires wherever they wish.
• Prevention of local Mongolians/westerners with own vehicles being allowed to drive everywhere through NP/NR. For example, driving to the top of Shillim Bogd Uul
• Better protection of wildlife at NP/NR. For example, I very rarely visit Khustain National Park in July as at sunset it has turned into a circus with tours operators/vehicles driving everywhere so their clients get to see a Takhi. What’s wrong with walking?

In relation to cultural tours outbound tour operators require:

• Expert knowledge on different regions of Mongolia: the cultural sites, rich cultural traditions, ways of life, local festivals and events, seasonal activities
• Well trained guides with good language skills and who are knowledgeable about the cultural sites visited and the traditional lifestyle and rich heritage of the nomadic communities visited
• Cultural experiences that enable clients to feel they have experienced a natural interaction with nomadic communities while still providing a level of comfort expected by clients used to western living
• Detailed information about itineraries, activities, and the interaction with local people, facilities and services available, so that expectations can match reality
• Pre travel advisory information including advice about cultural traditions and norms and how clients should behave and what they should expect.

2.7 Regional Competition

Neighbouring countries with similar nomadic traditions to Mongolia, in particular Kyrgyzstan, have the potential to compete for visitors searching for holidays that offer a nomadic experience. Although there are similarities between the nomadic cultures in Mongolia and Kyrgyzstan; such as a strong horse-based culture, living in yurts/gers, falconry, folklore and epic oral tales, the landscape in each country is quite different. Kyrgyzstan is 85% mountainous and many tours focus on the high mountain experience. The influence of Russian culture is much stronger in Kyrgyzstan, which was part of the USSR from 1917-91, and Russian is spoken in most high schools and universities. The extent of the nomadic culture is also much less prevalent, with less than 2% of Kyrgyz people still living in yurts compared to a nomadic lifestyle that involves more than 40% of Mongolian population.

However, for Mongolia to retain its competitive advantage as the primary Asian destination for experiencing a living nomadic herder lifestyle, it will need to ensure that it develops its cultural and community tourism experience in a way that secures the sustainability of the nomadic lifestyle and develops a tourism sector that is structured to support this approach. Sections 2.8 and Section 5 below, consider some of the actions required to achieve this.
2.8 Summary and Recommendations

Developing Cultural Tourism to Meet Market Demand

“A good experience with local people is an essential part of the Mongolian experience, especially in a country where there is limited infrastructure”.
Japanese tour operator

Mongolia is a people-centred travel destination due to its still large and important pastoralist way of life. Delivering high quality experiences with local people is an intrinsic part of the Mongolian experience. However, even amongst the most proactive inbound tour operators, the proportion of dedicated cultural tours is relatively low compared to other, primarily adventure tours.

Good quality experiences and interaction with local people, delivered through building close relationships with nomadic communities and telling the story of their traditional lifestyles can also be incorporated into adventure and nature tours.

The basis of the relationship between local communities and inbound tour operators underpins the quality of the experience. Providing information about this relationship is important for outbound tour operators and visitors, who are interested in being informed about the communities they visit.

Examples of best practice are evident amongst the inbound tour operators studied for this report in relation to developing:

- Long term relationships with local communities
- Local festivals that create positive interaction between guests and local communities
- Tours that focus on one geographical area
- Off season tours
- Specialist tours for niche interests
- Understanding clients’ expectations including creating ‘luxury comfort’ tours
- Balancing the material needs of visitors with providing ‘authentic’ experiences
- Training guides in the needs of visitors and interpretation of nomadic heritage
- Environmental policies.

These examples of best practice should be supported by tourism authorities and used as guidance for other businesses in the sector.

Section 4 looks in detail at the international approach to developing a sustainable tourism sector and ways in which individual countries have developed accreditation schemes to recognise and support best practice for tourism businesses that protect, and bring value to, local community traditions. However each country and destination has different issues and therefore requires individual ‘codes of conduct’. Mongolia will need to identify its own criteria to ensure that tourism supports and not destroys the nomadic lifestyle it promotes.
3. KNOW YOUR MARKET

3.1 Introduction
This section examines the market demand for cultural tourism trips to Mongolia, what visitors are expecting from their trip and how it meets their expectations.

It starts with an explanation of the 'visitor journey' and how the visitor experience in a destination impacts on future trips by other visitors. The expectation visitors have of an 'authentic' experience is then considered. This is followed by an overview of the size of the tourism market in Mongolia and the global cultural tourism sector, before the research findings are presented for the North American, European, Japanese and Russian markets.

3.2 The Visitor Journey: Pre-Visit Research to Post-Journey Feedback
Understanding the process that visitors undergo when they take a trip will help destination managers and inbound tour operators to understand more about their customers and plan the information and marketing that will attract them. It will also help the tourism sector to deliver the experience visitors want by identifying the gaps in what is offered and recognizing opportunities. The aim is to create loyal visitors who want to make a return visit and will recommend visiting your destination.

The aim is to be able to manage your customers’ experience and exceed their expectations.

This section addresses some of the issues involved in the pre-journey planning process and how it is impacted by post-journey recollections of a destination.

Searching for the information about a destination on the Internet prior to taking a holiday is one of the key elements of pre-departure preparation of most travellers. Often, travellers tend to trust the personal experience of other tourists who have already visited the destination and have expressed their opinion online.
Therefore, tourist reviews, reports and comments can make a strong impact on the decision of potential tourists. For this reason it is crucial to analyse reviews published in social media in order to identify the characteristics of tourist demand and to improve existing tourism products or create new ones to fully meet tourists’ needs and expectations.

To be able to meet a visitor’s expectations it is necessary to understand what their expectations are. Providing visitors with the ‘authentic’ Mongolian cultural experience that they expect requires an understanding of what ‘authenticity’ means to individual visitors.

3.3 Visitor Expectations of Authenticity

A tourists’ expectation of ‘authenticity’ varies based on several factors. Contributing factors include:

- Nationality and their own cultural experience
- Individual travel experience, the variety of cultures they have experienced
- Demographic profile: age and social economic background
- Budget for their trip
- Time available for their visit

In addition, the expectation and desire of an individual tourist for ‘authentic experiences’ can vary between their own holidays. Within one year a well travelled, well off tourist could take a city break, a relaxing beach holiday, a domestic break or a more adventurous holiday to experience a new culture.

Therefore different types of ‘authentic experiences’ will be required within Mongolia to meet the need and expectations of different visitors. North American and European visitors are more likely to be visiting Mongolia to experience a new culture, where as the Japanese might be wanting a short active adventure trip and a Russian living across the border may be looking for short city and shopping break.

Some tourist destinations within Mongolia need to focus on delivering a ‘taste of Mongolia’ presented in a way that is acceptable to the majority of ‘western’ or northeast Asian visitors and meets their own cultural expectations in terms of material comfort, facilities and services.

Further away from the more developed centres such as Ulaanbaatar and tourist ‘honeypots’ the expectation of encountering more authentic cultural experiences increases, and the need for their own cultural comforts may diminish.
3.4 Market Size

3.4.1 Visitor Markets To Mongolia

In 2013, Mongolia received 418,000 overnight visitor arrivals for all purposes, 12% less than in 2012. Between 2009, when global visitor arrivals declined due to the economic crisis, and 2012, Mongolia saw a steady increase in the number of arrivals.

From 2008 to 2010 the number of leisure visitors accounted for around 100,000 visitor arrivals\(^2\) (more recent data by purpose of visit was not available for this study).

**Figure 5: Number of Overnight Tourists to Mongolia 2009-13**

![Bar chart showing number of overnight tourists to Mongolia 2009-2013](image)

Source: UNWTO

Russia is by far the largest source market of the five markets studied for this report, accounting for nearly 18% of market share in 2013. However, unlike Japan and Germany, Russian visitors decreased by 11% in 2013 compared to 2012. During this period, arrivals from the USA also declined by nearly 6% and from France by 2%.

Figure 6 below clearly illustrates the size of the Russian market (18%) compared to the number of arrivals from France (1.8%), Germany (2.3%), Japan (4.4%) and the USA (3.5%).

\(^2\) UNWTO data by purpose of visit for 2011-2013 was not available.
China is by far the largest source market for Mongolia, accounting for 178,000 visitors in 2013, nearly 43% of the market. The other significant market in the region is Korea which, after China and Russia, is the third largest source market generating more than 45,000 visitors in 2013, nearly 11% of the market.

3.4.2 Global Cultural Tourism

Cultural, community and heritage tourism (CCH) is reported as being the largest tourism segment by some margin. An OECD report in 2009 noted that CCH tourism accounted for almost 360 million trips in 2007, or 40% of global tourism. In value terms, the contribution of CCH tourism is even greater as it is estimated that CCH tourists spend as much as one third more than other visitors.

From a consumer perspective, the desire to gain knowledge and educate oneself when on holiday is pushing demand for cultural and heritage tourism. There is an increasing demand for ‘experiences’ and a move away from mass tourism, generating an increase in independent travel and a desire to move ‘off the beaten track’ and truly immerse oneself in new cultures. Consequently the intangible elements of cultural and heritage tourism are becoming more important.

The major source markets for cultural and heritage travel are in the developed countries where travellers tend to be more affluent and North America and western Europe drive the market. In Asia and the Pacific region the main source markets are Australia, New Zealand and Japan.

---

3 Cultural and Heritage Tourism – International, Travel & Tourism Analyst, Mintel, May 2010
3.5 Consumer Expectations – Research Findings

Independent visitors, who book directly with inbound tour operators or local service providers, and those visitors booking through outbound tour operators can be segmented into the approximate grouping of Independents and Traditionals:

**Independents:**
Still in the backpacking mind-set, travel independently, free spirit adventure, recognise that some pre-organisation is useful in places with poor infrastructure. Mainly under 40, includes some older people but they are in the minority, usually with specialist interest e.g. photography, science, anthropology.

**Traditionals:**
Seek a level of comfort and organisation; generally 50+; welcome the opportunity for adventure but in small bites only.

The next sections present the findings from the social media research into visitor expectations of Mongolia’s cultural tourism offer, for visitors from North America and Europe, Japan and Russia.

The findings are primarily based on an analysis of the Independent visitors reviews and blogs on social media networks. They evaluate the views of independent visitors from North America, western European markets, in particular France, Germany and the UK, and from Japan and Russia.

The expectations of Traditionalists, who primarily book their trips through outbound tour operators, were researched in depth for the Mongolian Tourism Tailored Intelligence study in 2013 when outbound tour operators in seven markets were interviewed. Relevant findings from these interviews are used in this report support the social media analysis.

3.6 North American and European Visitors

3.6.1 Who is travelling independently to Mongolia?

The profile of independent travellers to Mongolia is broadly similar across these markets. They are most likely to be couples and singles, with a typical age range of 20 to late 30s; young children travelling with their parents are not uncommon. They are fairly evenly mixed, male and female.

3.6.2 Why do they visit Mongolia?

The prime motivation for visiting Mongolia is to discover the Mongolian culture, the nomadic way of life and the nature. These visitors are looking for authentic experiences (living with local people, crossing the country by horse). On average they are going to Mongolia for a minimum of 3 weeks to discover as much of the country as possible.

A core group are very experienced travellers who have been to Mongolia multiple times – some six or more times, and return time after time attracted largely by the nomadic lifestyle, culture and extraordinary landscapes.

Their interests include outdoor nature and adventure activities: trekking, horseback riding, hiking, photography and culture.

The French are particularly interested in adventure.

The Germans, who are interested in adventure, culture and sport, would like to travel around Mongolia by bike, motorbike or van.

The Americans are interested in the overall experience of Mongolia, they have a keen interest in the local lifestyle and interacting with local people.

3.6.3 Where are they going?

Independent visitors are visiting the main attractions of Ulaanbaatar with a particular interest in the museums and monuments.

They also like to experience national parks where they can meet the nomadic people and share their day-to-day life. They visit specific areas: shorter trips focus on one area such as Gobi, or Khustain National Park or central Mongolia; they take extended trips to the west, centre and south.
Independent visitors comments’ recommend focussing on one area rather than trying to cover too much of the country in one trip.

This snapshot of typical itineraries, taken from online posts published in 2013 and 2014, indicates that travellers from the main western markets are undertaking similar types of tours and activities, depending on their personal interest, time constraints and budget.

**Travellers from USA/UK/Australia**
- Golden Eagle Festival and Altai Mountains
- ‘Classic Route’ of the Gobi and the north
- Gobi trip – Baga Bazruun Chuluu (National Park, Dundgobi aimag); Tsagaan Suvarga (White Mountain); Dalanzadgad town; Yolun Am; Ongi Temple ruin; Zorgol mountain Gobi tour
- Trekking in Altai Mountains
- Adventuring in Altai Tavan Bogd - ‘mountains is very challenging’
- Nadaam Festival
- Horse Trekking, Nadaam, meet locals, live in gers, hiking Khogno Khan, Erdene Zuu Arkhangai – Tsenkher Hot Springs and White Lake; Gobi;
- Ulaanbaatar (museums and monasteries);
- Gobi; Tsetserleg; trek to Terkhin-Tsagaan Nuur; Lake Khovsgol (fishing, trekking, horse trekking, reindeer herders)
- Climbing Tavan Bogd, Altai
- Eagle Festival
- Music Festival, Ulaanbaatar
- Bekbolat – a highlight; most remote point feels like a different country
- Nature-based tourism – Khustai National Park, White Lake, staying in gers, camel and horse riding

**Travellers from France/Belgium**
- Gobi desert, central and north Mongolian trip – Tsagaan Suvarga (White Stupa); Yol Valley; Khongor Sand Dune; Camel Riding, Arvaikhheer City; Orkhon waterfall; Kharkhorin village; Erdene Zuu Monastery; Terkh White Lake; horse riding; Khorgo Volcano; Moron City; Khatgal Village; Khovsgol Lake; Ger camp; Khutag Ondor; Amarbayasgalant monastery
- Altai, Olgii
- Horse Trekking
- Jeep safari

**Travellers from Germany/Switzerland**
- The Amarbayasgalant Monastery; Khovsgol Lake and region; Lake Terkhiin Tasagaan, Khorgo Volcano; South Gobi and desert
- More nature, less cities; hiking; sleeping in tents and ger camps; food from the tour provider
- Travel by horseback and jeep; train on to Beijing

### 3.6.4 What types of cultural tourism are they participating in?

In Ulaanbaatar they are interested in the main museums and monuments of the country. The Germans commented more on this heritage element of their visit than the Americans or British.

All nationalities, particularly the French and German travellers, are looking for an authentic experience with local people. They like the idea of participating in the local life, being part of a community and enjoy staying with local families both in Ulaanbaatar and in the nomad camps. Some are happy to stay in ger camps while others feel these are too commercial and prefer staying in smaller ‘homestays’ with nomadic communities. They also like to take part in festivities and folklore. However the Naadam Festival is considered to have become too commercialised.

Participating in, and experiencing, the nomadic way of life is central meeting the expectations of the North American and Europeans visitors. They do not want ‘pseudo activities’, to see the local culture on display, eg Mongolian performers staged in hotels or at private ger camps but want to participate and interact with local communities and their daily life where possible.
3.6.6 How do Europeans interact with Mongolians?

Inbound tour operators report differences between some European markets in the way they interact with Mongolians:

- UK visitors are respectful but slightly detached; they are happy to stay in gers and tents
- French want authentic experiences and are not interested in pseudo activities. They are more cost sensitive than the British
- Dutch adapt more easily to the Mongolian culture and lifestyle, are happy to stay in tents, they are also very cost sensitive
- Germans and Austrians like to experience the culture through ‘experiential activities’ eg, riding, walking, hiking.
- Germans prefer to stay in German speaking groups and stay together. They are less adventurous and like their comfort
- Austrians like to trek, are happy to stay in tents and be in groups with other nationalities and speak English.

Overall the North American and European visitors have similar motivations for visiting Mongolia however there are subtle differences in their preferences and requirements. Understanding the requirements of specific markets is an important element of delivering a good service. To achieve this, regular visitor research needs to be undertaken and inbound tour operators and service providers need to collect feedback from their clients and guests.

3.6.7 Are they concerned about how tourism impacts on local communities?

There was no commentary on social media about how their visit may impact on local people.

Only the Germans discussed the problems of recycling and disposing of rubbish. There was some concern about the impact on the environment and nomadic population as tourism expanded and more travellers move from camp to camp.

North Americans are not necessarily searching for a ‘responsible, sustainable or eco-tourist’ company however the biggest attraction for this market is Mongolia’s nomadic culture and its natural beauty and they are concerned about activities threatening them.

Feedback from European tour operators shows that although sustainability is not an official requirement for western European consumers, it is an informal one; they do want an authentic experience and outbound operators rely on local agents to supply it. Therefore there can be a preference to work with local suppliers that exhibit best practice in responsible tourism, environmental policy and in their relationships with local communities.

Consumers want to feel that their tourism expenditure is reaching local communities. Therefore outbound tour operators will look for local agents and inbound operators who use ger camps and other suppliers with responsible credentials. Western consumers are becoming increasingly aware of the negative impacts of tourism and although sustainability certification is not currently a requirement for outbound tour operator suppliers in Mongolia, certification does provide buyers with the security of knowing they can sell their tour as a ‘responsible tourism’ product. Section 4 addresses the issue of sustainability certification in more detail.

3.6.8 What practical issues are they talking about?

The main issues that are being discussed by independent travellers online are:

- **Travel arrangements:** 60% want to meet up with other travellers on specific dates, on specific routes
- **Transport queries:** 20% are concerned with internal flights, buses, taxis, hire vehicles
- **Recommendations, reviews and warnings:** 10% comment on tour companies
- **Other issues:** 10%, for example food and water; travelling by motorbike; visa issues; border issues

Overwhelmingly, independent travellers are keen to meet up with other like-minded travellers and create travelling groups so they can reduce the cost of the travel itinerary. Single travellers are keen to meet a travelling friend so they can reduce costs and lessen the perceived risk of travelling alone.

- **Budget** is a key motivating factor for independent travellers - there is a significant focus on the costs involved in hiring guides and vehicles, accommodation costs and options
- There is considerable debate about whether to book tours in advance or once in Mongolia, versus travelling totally independently. The real benefit of booking tours in advance is largely believed to be that it is cheaper as you can join in with tours already planned. However, it is widely accepted that it is not necessary as there are plenty of tours to join at short notice.
- **Local transport** is known to be unreliable, sparse and time-consuming, but hardcore adventurers with time on their hands often choose to travel this way. Internal flights, routes, prices and timetables are a common topic while significant numbers talk about train routes and timetables.

- **Food and sustenance** is another common topic. Vegetarians and vegans are concerned about the high meat diet in Mongolia, while bottled water is an ongoing issue as vendors have been known to refill and reseal mineral/spring bottled water for sale.

- Seasoned travellers are more adventurous in their **experiences with local people**, for example those who have been to Mongolia up to six times before recommend homestays, and some independent travellers are exploring the remote border areas between Mongolia and Russia and China.

- There is notable concern among travellers about ‘protecting themselves’ from **unscrupulous independent operators, guides and taxi drivers**.

- **Safety** is a concern but a less common topic.

- **Reviews** range from good and bad tour operators, state of the roads, quality of the food, and recommendations for guesthouses, internal flights and internal travel options, weather. Travellers freely pass on information about both good and bad operators, and willingly contribute to ongoing threads ie, online conversations.

### 3.6.9 What are their comments on their cultural experiences?

**What do they like?**

The cultural and educational experience of learning about the traditional way of life impacts profoundly on many travellers.

The experience of living in a nomad camp is considered, particular visitors from France, to be a life changing experience and allows these travellers to discover the meaning of taking the time to live and living in harmony with the environment.

Some, particularly the French, are surprised by the contrast between the traditional way of living and the use of modern technology such as solar panel or satellite dish.

- "As their life style is so different, it is a great life changing experience."
- "The nomadic lifestyle looks very hard but it helps people to stay true to themselves."

German travellers

The traditional way of life, the natural landscape and the festivals generate most comment.

- "During my trip to Mongolia I’ve learned a lot. About the country, its people and about myself. Mongolia is a fascinating country. Different. Wider. Diverse."

German traveller

Many travellers comment that the Nadaam Festival is best in the smaller towns and villages rather than Ulaanbaatar, which is huge, difficult to orientate and means that you miss a lot. The Eagle festival and Ice Festival at Lake Khovsgol are popular, as is Tsaagan Sar, the Mongolian New Year, being a significant cultural holiday.

Finding accommodation that provides unexpected comfort while retaining an authentic atmosphere, such as at the Three Camels Lodge in Gobi, is very popular and generates a high volume of positive reviews.

---

"An amazing experience"

Reviewed 1 September 2014

This is an amazing property where you stay in Mongolian style "Ger" while enjoying the luxury of a boutique property. The food is outstanding, the service staff pays attention to every detail and very customer oriented. Our guide "Eggy" and the drivers were very friendly. It is a beautiful country with an amazing landscape and very friendly people.

Stayed August 2014, travelled with family
What don’t they like?

After one or two days in Ulaanbaatar, travellers tend to leave the capital because they find it very unattractive and chaotic.

Independent travellers would like to discover the country by themselves but feel uncomfortable doing so because of the language and the transport. They feel the need to rent a 4x4 with a guide or rent horses with a guide.

They are concerned about the cost and quality of local tours and whether or not to travel completely independently.

"Shop around on price as there are many companies doing same trips and prices vary considerably. Confirm vehicle as cheap price may mean a Russian van."
American traveller

We spent two weeks traveling around Mongolia without an agency, it worked out fine.
Nationality not known

Security concerns are limited but even one bad review can impact negatively on future visitors. For example there are reports about the dangers of kayaking alone, after one traveller was attacked by a group of young Mongolians. Other reviews are very positive.

I have travelled to Mongolia twice on my own and have never felt safer in any other country. Mongolians are beautiful and respectful people and I felt safe at all times.
Australian female traveller

The quality of the guides can be very mixed and has a considerable impact on the overall visitor experience.

"Many people we encountered were not happy with the quality of their guides"
Californiaan traveller

Feedback from French tour operators highlighted the issues of poor interaction with nomadic communities and the challenge of meeting the material needs of visitors while still providing an authentic community experience.

"The interactions with local people, particularly the Naadam Festival, have become too commercial. The quality of the human experience is disappointing, not meeting true nomads – every tour meets the same people. Camps need to create comfort and create ways to share the values of the locals”.
French tour operator

Summary: North American and European Visitors

- Key Points
  - Independent travellers are mostly age 20 – 40 years
  - Mostly couples and some young families and single travellers
  - Average length of stay is 3 weeks
  - Repeat visits are by people attracted by the culture and traditional lifestyle
- Tangible culture – most commented on by the Germans
  - Museums and monasteries in Ulaanbaatar; other monasteries
- Intangible culture is the main motivation for visiting:
  - Meeting nomadic people and participating in their way of life, staying with local families
  - Festivals – Nadaam – though too commercial in UB; Eagle, Music, Ice; Tsaagan Sar (Mongolian New Year)
- Main issues for travellers
  - Budget – main concern especially Dutch and French
  - Inbound tour operators and travel agencies in Ulaanbaatar shapes their opinions of Mongolia
  - Quality and value of tours generates positive, and negative, feedback online and by word of mouth recommendations
  - Guides: the experience of meeting local people is dependent on the guide they have on their tour, for many people travelling to Mongolia for the first time

More confident travellers, who have visited before, organise direct contact with local communities, for example by arranging to stay in homestays or visiting communities in more remote areas.
3.7 Japanese Visitors

3.7.1 Introduction

The use of social media for travel reviews is much less common in Japan than in North America and Europe. TripAdvisor is used in Japan however at the time of writing this report there were no reviews about Mongolia. Two sites that did have some reviews were Tabisuke and 4travel.

Due to the lack of online reviews, other sources were used to research the Japanese market including some interviews with tour operators, online travel trade news and academic studies; these are listed under Sources at the end of this report.

3.7.2 Who is travelling to Mongolia?

Traditionally most Japanese visitors have been over 45 years, with the over 55 year olds accounting for around a third of all visitors. The 25-34 year olds accounted for around 20%, one fifth of visitors and it is now this younger age group that the focus for increasing Japanese tourism to Mongolia, particularly for independent travel. The older segment remains the main market for package tours.

The average length of stay for a Japanese tourist is around 8 or 9 days, considerably shorter than western tourists who tend to stay for an average of 3 weeks.

These travellers are well educated; usually to college level and the vast majority are employed professionals. They have disposable income and expect a good quality experience.

3.7.3 Why do they visit Mongolia?

The Mongolian landscape and the both the tangible and intangible cultural experience are the major attraction for Japanese tourists. In particular:

- The beautiful grassland landscape
- The nomadic culture - staying in gers or homestays with local people
- Activities in the natural environment – particularly horse riding
- Visiting world heritages sites and the Chinggis Khan story.

Most of the travel groups tend to be categorised as ‘adventurous’, ‘off-the-beaten-track. Mongolia is regarded as a special interest tour (SIT) destination for pursuits such as hunting and fossil digging, which appeal to a small niche market.

3.7.4 Where are they going?

The most popular sites for Japanese tourists were:

- Arkhangai
- Underdov

Followed by:

- Terelj
- Gobi
- Khid

The least popular attractions were

- Khangai
- Khentii
- Overhangai

3.7.5 What types of cultural tourism are they participating in?

The Japanese are participating in both tangible and intangible cultural activities. They are visiting historic sites, the museums and monasteries and are interested in Mongolia’s greatest historical personality and the Chinggis Khan heritage. However they also place emphasis on experiencing the intangible culture of Mongolia, and are looking for interaction and authentic experiences through experiences with nomadic communities and enjoying the activities in the natural environment such as horse riding, star gazing or visiting the desert.

3.7.6 Are they concerned about how tourism impacts on local communities?

Japanese tour operators tend to consider ‘responsible tourism’ to be important to their business. This is particularly important in Mongolia where the core tourism product is based around Mongolia’s pristine nature and preservation of the
landscape is important to sustainability of the tourism industry. Some tour operators also try to contribute to the nomadic families and rural communities by using homestays.

There is no online commentary about the impact of tourism on local communities or the environment but positive experiences with local people are also an essential part of the Mongolian experience.

3.7.7 What comments are Japanese travellers making on their cultural experience?

What do they like?

Nature, the nomadic lifestyle, ger camps and homestays were well regarded, followed by Mongolia’s history and culture. The relaxation of visa regulations, since 2011, has also encouraged more Japanese to visit.

“Priceless experience!!”

“The travel got much easier with no visa request”

“Life without TV and internet. Mongolians are living a happy life even if they do not have any modern amenities”

“It felt special to see the star-filled night sky”

“Our ger was very modern and we had a comfortable stay as it had shower facilities such as toilet and shower room inside”

“It was an amazing experience watching the sunset while bathing in the hot spring.”

“Dressing up in Mongolian traditional clothes was so much fun!!”

“There were groups of old temples. They must be a nice attraction for those who like history.”

“Terelj was a good contrast with Ulan Bator for the nature that most people are expecting from this country.”

“I love Hustai Park. Observing the wild takhi horses there was the best experience. It is a must see!!”

(Reviews from Tabisuke and 4 (For) travel)

What don’t they like?

Tour operators report that although upmarket Japanese tourists respect the authentic side of Mongol such as staying in a ger or homestay experience, they consider those experiences are enough for half or one day and place more value on a comfortable stay at luxury hotels. The balance between ‘comfortable and convenience stay’ and ‘authentic stay’ seems to be difficult for upmarket Japanese tourists.

In addition, the lack of adequate transport infrastructure in Mongolia constrains tourism activity.

The attractions are long distances apart but the infrastructure of domestic airlines is still poor, especially during the off-peak season. If they are driving, most tourists will travel on the unpaved roads for around 7-8 hours a day. In addition, the sewage system is not well maintained, and rest stops during the journey are inadequate.

Poor accessibility to remote areas, lack of roads, uncontrolled flow of local people to areas of tourism development, insufficient tourism infrastructure and facilities have been identified as the cause of dissatisfaction for Japanese tourists.

Internal flights are also considered problematic, being expensive and unreliable.

The cost of tours and transportation are considered expensive.

The level of satisfaction with Mongolian food for Japanese tourists is also low compared with other foreign tourists because menus are not geared toward Japanese.

Previous studies have also raised the need for adequate standards for hygiene and sanitation that must be established and strictly followed up by quality inspections in tourism operations.4

4 Yu and Goulden, 2005
"We have had so much culture shock during our stay!"

"Too many meat dishes! I have got a bit tired of it".
"It was difficult to travel around Mongol freely by using the public transportation as an individual. We needed to order a guide and a car, but it was expensive and it was not a flexible style of travel."

"My guide said that it is not safe as there were a lot of thieves in the market."
(Reviews from Tabisuke and 4 (For) travel)

Summary: Japanese Visitors

Key Points
- Independent travellers tend to be between 25 and 34 years old and are attracted by the landscape, nature and adventurous outdoor activities, particularly horse riding. They are interested in the nomadic culture and staying in gers and with local people
- Older visitors are more likely to book a package. Reasonable to high levels of comfort and good quality experience with local people are expected
- The story of Chinggis Khan holds appeal for Japanese visitors
- Average length of stay is 8-9 days, shorter than Western visitors

Responsible tourism is important for outbound tour operators and older clients.

3.8 Russian Visitors

3.8.1 Overview

The information collected for this study is from interviews with Moscow based tour operators and from an analysis of the most visited travel forums where Russian tourists post their reviews and comments, express their opinions and views regarding their trips to Mongolia, share their experience and impressions.

To get an up-to-date insight about the consumers’ preferences only the reviews about the trips organized in 2013 and 2014 were considered for this analysis. As a result 33 reviews retrieved from seven websites were analysed.

This difference in volume of the number of posts by Russians compared to the number found in the USA and the UK forums illustrates the importance social media now has in the North American and European markets, while being a growing influence in Russia.

Visitor numbers from the Russian market are growing and feedback from travellers on social media is positive. However Mongolia has low visibility in the Russian media, which means that there is a lack of consumer awareness about the diversity of the travel experiences offered. Generally, the appeal of Mongolia for the Russian market is its nature and outdoor experiences rather than the cultural experience.

3.8.2 Who is travelling to Mongolia?

Most Russians who spend their holidays in Mongolia:
- Travel in small groups or as a family or couple
- Come from the emerging middle and upper-middle class and have disposable income
- Travel independently, organising their own itinerary, rather than using a travel company
- Make repeat visits.

The percentage of repeat Russian travellers to Mongolia is between 25-30% from central Russia, but it is higher from the Western Siberian areas and Novosibirsk.

The majority of independent travellers from Russia to Mongolia are from cities near the Mongolian border and they tend to drive to Mongolia. Around half of the tourists came from the nearby cities of Irkutsk, Ulan-Ude, Chita, Barnaul and Novosibirsk.

The visitors that arrive by air tend to come from Moscow.

There are three types of tour operators that are organising Russian tours to Mongolia:
I. Those that are Western orientated and based in the Moscow area;
II. Those in the east from Siberia where the culture is similar to Mongolia and
III. Adventure orientated trips such as tailor made hunting programmes.
Five main categories of Russian travellers are identified as the highest potential segments for Mongolia to target in its promotional activities in Russia. They include:

I. Empty Nesters and Families
II. Experience Seekers and Adventure lovers
III. Active Sports and Niche interest followers (fishing, hunting, wrestling etc)
IV. Buddhism religious explorers
V. MICE groups are also a segment with long-term potential due to affordability, accessibility and novelty of the destination.

3.8.3 Which sites are they visiting?
The most popular sites for independent visitors that were being discussed online are listed in the table below.

<table>
<thead>
<tr>
<th>Top Cultural Sites</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Genghis Khan Square, Ulaanbaatar</td>
<td>33%</td>
</tr>
<tr>
<td>Zaisan Memorial</td>
<td>21%</td>
</tr>
<tr>
<td>Buddha Statue</td>
<td>21%</td>
</tr>
<tr>
<td>Gandantegchinlen Monastery</td>
<td>18%</td>
</tr>
<tr>
<td>Ancient Karakorum</td>
<td>12%</td>
</tr>
<tr>
<td>Choijin Lama Temple</td>
<td>9%</td>
</tr>
<tr>
<td>Genghis Khan Statue Complex</td>
<td>9%</td>
</tr>
<tr>
<td>The National Museum of Mongolia</td>
<td>9%</td>
</tr>
<tr>
<td>Beatles Monument</td>
<td>9%</td>
</tr>
<tr>
<td>Khamar Monastery</td>
<td>9%</td>
</tr>
</tbody>
</table>

One in three Russian tourists analysed visited Genghis Khan Square in Ulaanbaatar and one in five went to the Zaisan Memorial, Buddha Statue and Gandantegchinlen Monastery. Based on the top 10 top cultural sites, the majority is concentrated in Ulaanbaatar and only two are located outside the capital, namely Ancient Karakorum and Khamar Monastery.

Out of all 37 cultural sites visited, 17 are located outside the capital. Despite being less popular, they are still amongst the tourist attractions visited by Russian. These are mainly monasteries both acting and ruined (Demchigiin Khid, Ongiin Khid, Erdene Zuu Monastery, Tuvhun Monastery, Manjusri Monastery), burial places and memorials spread around the steppe, and rock carvings (petroglyphs in the Mongolian Altai), the majority of which are not planned to be visited but rather found by chance while traveling through the country.

Natural sites, particularly lakes and the desert and dunes, were very popular. Lakes were particularly popular; they are mostly located in national parks or reserves (Altai Tavan Bogd National Park, Hovsgol National Park, Uvs Nuur Nature Reserve, Khyargas Lake National Park). Altai Tavan Bogd is the most popular national park visited by a third of the Russian tourists surveyed. Amongst the Gobi desert sites Russian travelers are most attracted by Khermen Tsav canyon.

3.8.4 Nature and Adventure tourism predominate
Russian travellers tend to combine eco and cultural tourism itineraries when visiting Mongolia. First timers are motivated to discover the authentic nomadic lifestyle and simplicity of local people, as well as enjoy the serenity of natural landscapes and explore the cultural realities of Mongolia.

The main motivation for visiting Mongolia is for adventure tourism and enjoying the landscape. Wild camping is popular, while yurts and guesthouses are also used, although less frequently.

Independent Russian visitors are not particularly interested in traditional festivals, the nomadic lifestyle or interacting with local communities. The natural landscape holds more appeal for them than the traditional way of life.

Adventure travel and trekking or fishing and hunting trips do usually include a "cultural" component including a stop-over in the capital of Mongolia for shopping and sightseeing.
There is a growing segment of travellers going to Mongolia who are interested in Buddhist culture and are interested to take part in religious rituals. They also appreciate the nature and trekking but will focus on monasteries and temples, rather than lakes and canyons. Those who travel only for Buddhist temples and religious rituals are ‘culture vultures’ and are only a small niche.

Most Russian’s seek a combined adventure, cultural experience or prefer to go to Mongolia exclusively for its natural sites and landscapes. As a result, tour operators tend to follow this trend and offer a standard itinerary that offers a general sightseeing program with trekking option.

A sightseeing program of the capital city is included in all tour operators offers, and is also important for independent travellers. The most popular itinerary in mid-2014 was the historic tour ‘In the Steps of Genghis Khan’ and ‘Naadam’ Festival.

Sightseeing and shopping in Ulaanbaatar are also very popular, primarily for cashmere, camel hair, fur and leather. Newly introduced wellness and detox tours to Mongolia are also proving popular both with travel trade partners and end-consumers.

3.8.5 What types of cultural tourism are they participating in?

Russians, particular those from the regions near the Mongolian border are most interested in the tangible cultural heritage, the sites in Ulaanbaatar and the ancient monasteries.

Mongolian intangible culture, based around its traditional lifestyle, is of less interest to the Russians who live near the border as the nomadic lifestyle is not so unique and different for them, as it is for western visitors.

However the Buryatia Russians, the 28 million Mongolians living in southern Russia, are interested in the culture of the ‘Motherland’ and may visit festivals such as the Altargana Festival.

The Russians and Chinese are looking for cultural projects that have some relationship with their own culture. The Silk Road and the Tea Road appeal to these markets.

Summary: Russian Visitors

Key Points
- Adventure and nature tourism are the main motivation for most Russians visiting Mongolia.
- Cultural tourism is focussed on tangible culture – the museums, memorials and monasteries of Ulaanbaatar, together with its shopping. Outside the capital the Chenngis Khan heritage and Buddhist monasteries and temples are of most interest.
- First time visitors, primarily from Moscow, have an interest in experiencing the nomadic lifestyle. Mongolia’s intangible culture appeals through the landscape and associated adventure activities. To a lesser extent the festivals are of interest, however the traditional lifestyle and experiencing the nomadic lifestyle are of lesser interest.

3.9 Summary and Recommendations

3.9.1 Summary

North American and European Visitors
- Independent travellers are mostly age 20 – 40 years
- Mostly couples and some young families and single travellers
- Average length of stay is 3 weeks
- Repeat visits are by people attracted by the culture and traditional lifestyle
- Tangible culture – Museums and monasteries in Ulaanbaatar; other monasteries
- Intangible culture is the main motivation for visiting:
  - Meeting nomadic people, participating in the herders way of life, staying with local families
  - Festivals - Nadaam - though too commercial in UB; Eagle, Music, Ice; Tsaagan Sar (Mongolian New Year)
- Main issues for travellers
  - Budget – main concern especially Dutch and French
  - Experience of inbound tour operators and travel agencies in Ulaanbaatar shapes independent travellers opinions of Mongolia
  - Quality and value of tours generates both positive and negative feedback online and by word of mouth recommendations
  - Guides: for many people travelling to Mongolia for the first time the experience of meeting local people is dependent on their guide
More confident travellers, who have visited before, organise direct contact with local communities, for example by arranging to stay in homestays or visiting communities in more remote areas.

**Japanese Visitors**
- Independent travellers tend to be between 25 and 34 years old and are attracted by the landscape, nature and adventurous outdoor activities, particularly horse riding. They are interested in the nomadic culture and staying in gers and homestays with local people.
- Older visitors are more likely to book a package. Reasonable to high levels of comfort and good quality experience with local people are expected.
- The story of Chinggis Khan holds appeal for Japanese visitors.
- Average length of stay is 8-9 days, shorter than Western visitors.
- Responsible tourism is important for outbound tour operators and older clients.

**Russian Visitors**
- Adventure and nature tourism: the main motivation for most Russian visitors.
- Cultural tourism is focussed on tangible culture – the museums, memorials and monasteries of Ulaanbaatar, together with shopping. Chenngis Khan heritage and Buddhist monasteries and temples are of most interest outside the capital.
- First time visitors, primarily from Moscow, have an interest in experiencing the nomadic lifestyle.
- Mongolia’s intangible culture appeals through the landscape and associated adventure activities. To a lesser extent the festivals are of interest, the traditional lifestyle and experiencing the nomadic lifestyle are of lesser interest.

### 3.9.2 Recommendations

**North American and European Visitors**
- The relationship with the local people is a central element of these visitors experience of the country. Therefore the quality of the interaction between visitors and local communities needs to be central to the organisation of any tour.
- High quality guide training is a key factor in delivering the type of cultural tourism experiences that visitors expect: this involves understanding the consumer and having an in-depth knowledge of the region visited and local nomadic traditions.
- Tours should focus on one region rather than covering too much of the country.
- Offer value for money and transparency – even budget conscious backpackers are prepared to pay for what is considered to be a high quality and good value.
- The long-term impact of reviews on social media sites means that inbound tour operators need to regularly monitor online conversations and respond to issues and concerns raised.
- Provide ‘expert’ advice to travellers online questions about Mongolia, rather than self promotion of your services.
- Provide realistic accounts of the experience in order to manage expectations of tourists.
- Create partnerships between public and private sector to create and circulate market intelligence about key source markets.
- Put tour operator environmental policies and details of relationships with nomadic communities on the website for use by travellers and outbound operators.

**Japanese Visitors**
- Inbound tour operators that are targeting the Japanese market need to ensure they can offer Japanese speaking guides and provide suitable menus.
- The shorter length of stay, than for American and European visitors, means that specific regional tours should be offered, rather than a full country tour.
- Develop good relationships with nomadic communities that can host for Japanese guests and could develop a homestay programme.
- Look for comfortable options for outbound tour operators and shorter 1-2 days nomadic experiences.
- Identify outdoor adventurous activities for younger independent travellers.
- Develop an environmental policy and make outbound tour operators aware of it.

**Russian Visitors**
- Inbound tour operators targeting the Russian market should focus on delivering tangible cultural heritage tours combined with nature and outdoor activity experiences.
- Develop further market intelligence about Russian market segments and their interests. For example, promote festivals such as Naadam for visitors from Moscow and the Altargana festival to Buryatia Russians.
- Tour operator websites should be designed for the Russian market to tap into the large independent traveller market and growing use of Internet and social media.
3.9.3 Conclusions: National Tourism Board to lead on Market Intelligence

Inbound tour operators need to have an in depth knowledge of the cultural and community tourism product that is available in Mongolia. In addition they require a good understanding of the expectations of the tourist markets they are selling to so they are able to match the most appropriate type of cultural experience to the relevant clients.

To develop an understanding of the expectations and needs of the visitors on-going market research is required, ideally based on visitor satisfaction surveys. It also requires communicating this market information to the tourism sector (local communities, NGOs, inbound tour operators, business support organisations) by the national tourism authorities.

This is a function that should be led by a National Tourism Board. In countries such as Great Britain and Australia regular market research is undertaken into their core markets and made available to tourism business on their website eg. VisitBritain (www.visitbritain.org/insightsandstatistics) and Tourism Research Australia (www.tra.gov.au).

It is also very valuable to draw on the market knowledge of the tourism sector itself, which usually has a good understanding of the visitor markets they are working with. In collaboration with the public sector, this information should be collected to produce market profiles of specific markets and distributed widely across to the sector.
4. SUSTAINABLE DEVELOPMENT

4.1 Introduction

The further development of Mongolia’s cultural tourism product needs to be done in a sustainable way that contributes to spreading the benefits of tourism to remote rural areas, while minimising its negative impacts.

If it is not carefully managed, tourism may cause the change or loss of the local nomadic identity and values through commodification of the local culture and adaptation of local values systems to meet tourist demands.

This is particularly relevant to nomadic communities that are not cash communities and where the benefits of community based tourism need to be carefully managed to ensure they add value to the community, rather than providing cash input that disrupts the community’s existing value system and may undermine the balance of the herder way of life.

To provide guidance for a sustainable cultural tourism development strategy, this study has reviewed relevant international sustainability guidance to identify those most appropriate for Mongolia. However many of the sustainability guidelines are quite general, focusing in environmental issues rather than specifically community based tourism.

Therefore case studies of relevant sustainable cultural tourism products have been included as examples of how a relevant approach to developing cultural tourism has been achieved elsewhere.

The importance of tour guides in ensuring a high quality visitor experience was highlighted through the consumer research. This section includes guidance on how a professional culture tour guide sector could be developed.

The importance of establishing realistic visitor expectations was also raised by the market research and tips on educating visitors are provided, together with general guidance on establishing a community based tourism business.

4.2 Sustainable Certification Schemes

“There is no blueprint, no internationally valid prescription for how tourism should be made more sustainable. The salience and importance of issues varies from place to place, affected by the cultural and natural environment, and solutions vary too.”

Prof. Harold Goodwin, International Centre for Responsible Tourism

There are numerous sustainability schemes that have been developed worldwide. Many schemes have been developed for specific countries or destinations; others have a more global application.

This section reviews some of the international standards that provide a framework for sustainable tourism development and references examples of national guidelines that have relevance to Mongolia.

For further information on sustainable tourism guidelines the DestiNet Portal for Sustainable Tourism (http://destinet.eu) provides a wide range of resources. It describes and provides links to the websites of over 60 eco labels for sustainable tourism worldwide, as well as examples of best practice and awards for excellent sustainability, environmental, or social performance or innovation.

In considering the most appropriate approach to developing sustainable cultural tourism in Mongolia it is important to be aware that there is no one model that will be suitable to all destinations and Mongolia’s individual conditions will need to be taken into consideration.

4.3 Why Is Certification Important?5

Certification sets standards and helps distinguish genuine ecotourism and sustainable tourism businesses from others that make empty claims. It is one of a number of tools for motivating businesses and others to improve their environmental, social, and economic performance, while rewarding them for doing so. These rewards are sometimes tangible and sometimes not.

Benefits for certified businesses
- Certification helps businesses to improve themselves: going through a certification process is educational. Many certified businesses have stated that one of the greatest benefits of the certification process was to teach them the elements of sustainability in their operations and focus their attention on the changes they needed to make in their businesses. A better-operating business tends to be more efficient and to attract more clients.

5 A Simple User’s Guide to Certification for Sustainable Tourism and Ecotourism, TIES, Rainforest Alliance and the Centre on Ecotourism and Sustainable Development
Benefits for consumers

- Certification provides tourists with environmentally and socially responsible choices – it helps consumers to know which businesses are truly socially and environmentally responsible and to make choices on this basis. As certification programs become better known, this may produce tangible benefits in a business’s reputation and popularity.
- Certification can alert tourists to the environmental and social issues in an area, allowing them to act more respectfully or contribute to solutions.
- Certified businesses tend to offer better quality service.
- Benefits for governments
- Certification helps governments protect their market niches as ecotourism or sustainable tourism destinations, especially when the credibility of the destination is threatened by green washing.
- Certification raises industry standards in health, safety, environment, and social stability.
- It lowers the regulatory costs of environmental protection.
- By requiring economic benefits to communities, certification can help reduce poverty, especially in rural areas.

Benefits for the environment and local communities

- Certification of sustainable and ecotourism protects both the environment and the social and economic structure of local communities near the certified businesses.
- Certification requires the businesses to protect the environment and do little or no damage to it.
- It requires businesses to respect local culture and provide real economic and social benefits for it.

4.4 International Sustainability Guidelines

International sustainability guidelines provide a framework from which a destination can develop more detailed sustainability strategies or certification schemes. Three sets of guidelines are summarised below.

4.4.1 Global Sustainable Tourism Criteria [www.gstcouncil.org/sustainable-tourism-gstc-criteria]

The Global Sustainable Tourism Council (GSTC [www.gstcouncil.org]) was established in 2010. It is a global initiative to promote sustainable tourism practices around the world. Membership includes UN agencies (UNWTO, UNEP, UN Foundation), leading travel companies, hotels, tourism boards and tour operators.

The Council fosters sustainable tourism through the adoption of universal sustainable tourism principles and has produced a set of Global Sustainable Tourism Criteria.

The Criteria are the minimum requirements that any tourism business or destination should aspire to reach in order to protect and sustain the world’s natural and cultural resources while ensuring tourism meets its potential as a tool for conservation and poverty alleviation.

There are 37 criteria organized around four main themes: effective sustainability planning, maximizing social and economic benefits for the local community, enhancing cultural heritage, and reducing negative impacts to the environment. Although the criteria are initially intended for use by the accommodation and tour operation sectors, they have applicability to the entire tourism industry and have been developed to apply to tourism destinations.

The Criteria indicate what should be done. Performance indicators, associated educational materials, and access to tools for implementation from public, NGO and private sector providers explain how to deliver the criteria and to assess whether the goal has been achieved.

The Council has an Accreditation Panel that recognizes standards and certification programmes that are considered credible, transparent, and impartial and comply with the GSTC Criteria for sustainable tourism.

Summary
These international guidelines for hotels, tour operators and destinations provide a framework for sustainable tourism development.

Relevance to Mongolia
The GSTC is a good starting point. Its Global Sustainable Tourism Criteria aim to be applicable to destinations and tourism businesses worldwide. The Council provides a wide range of resources and training programmes for destinations and tourism businesses which can be found on their website [www.gstcouncil.org]. It also provides accreditation for other tourism sustainability and certification programmes, which may have more specific relevance to individual Mongolian businesses.

4.4.2 ISO 26000 SR - Social Responsibility
This International Standard provides guidance rather than criteria on how businesses can operate in a socially responsible way. It is international and aims to be relevant to organisations of all sizes and types.

The Seven Core Subjects, which every user of ISO 26000 should consider, are:
- Organizational governance
- Human rights
- Labor practices
- Environment
- Fair operating practices
- Consumer issues
- Community involvement and development

Summary
These are general international standards that provide a good framework for sustainable development and includes tips for how SME’s can apply the standards.

Relevance to Mongolia
Meeting ISO 26000 SR is a good objective for all businesses, however the generic nature of the standard could be onerous for small Mongolian tourism businesses unless there is support from government agencies on how to apply the standard. However elements of the International Standard can provide appropriate guidance for businesses of all sizes. For example producing a Business Code of Ethics that communicates the key business values and communicates ethical behaviour of a business to its suppliers and customers.

4.4.3 The Geotourism Charter, National Geographic

Geotourism is defined as tourism that sustains or enhances the geographical character of a place - its environment, culture, aesthetics, heritage, and the well-being of its residents.

Geotourism incorporates the concept of sustainable tourism that destinations should remain unspoiled for future generations while allowing for ways to protect a place's character. Geotourism also takes a principle from its ecotourism cousin, that tourism revenue should promote conservation and extends it to culture and history as well, that is, all distinctive assets of a place.

The National Geographic Society has drawn up a ‘Geotourism Charter’ based on 13 principles, Governments and allied organizations that sign this statement of principles take a first step in adopting a geotourism strategy. After committing to a geotourism strategy, signatories then work with local communities to determine their geotourism goals. The Geotourism Charter is provided in Annex 2.

Summary
The Geotourism Charter provides a framework for destinations to develop a Geotourism Strategy that incorporates 13 core principles to develop tourism that sustains or enhances the environment, culture, aesthetics, heritage and the well-being of communities and residents.

Relevance to Mongolia
The Geotourism Charter sets a framework for tourism development that addresses many of the issues to be addressed in developing Mongolia’s cultural tourism offer. The principles include enhancing geographical character by developing and improving it in ways distinctive to the locale, reflective of its natural and cultural heritage, so as to encourage marketing differentiation and cultural pride. Community involvement and community benefit are also central to the Charter’s principles.

4.5 International Certification Schemes

There are various certification schemes that can be applied to any destination and follow the principles set out in international sustainability guidelines. Four of the more widely known schemes are assessed below for their relevance to Mongolia.
4.5.1  Biosphere Responsible Tourism  www.biospheretourism.com

Biosphere Responsible Tourism certification has been established by ITR, an independent organization that implements actions and sustainable development programmes in the tourist industry following UN and UNWTO guidelines. The requirements demanded by BIOSPHERE standards cover:

- The preservation of natural, cultural and landscaping heritage
- The economic and social development of the local community
- The contribution of the entity to the quality of life of the employees
- The conservation of the environment.

Accredited businesses incorporate hotels, parks and destinations. Currently the majority of Biosphere accredited businesses are hotels in North and South America and Europe. None are currently listed in Asia.

Summary
The scheme provides tourism businesses with an individual sustainability policy and action plan based on the World Charter for Sustainable Tourism.

Relevance to Mongolia
The scheme is currently not operational in Asia. A strong commitment would be needed from government bodies and the tourism sector to establish the scheme in Mongolia.

4.5.2  Green Globe  www.greenglobe.com

The Green Globe Standard is a structured assessment of the sustainability performance of travel and tourism businesses and their supply chain partners. Businesses can monitor improvements and document achievements leading to certification of their enterprises’ sustainable operation and management.

Summary
Green Globe is used globally including 12 destinations in Asia. Accommodation providers including hotel and resort chains are the main users.

Relevance to Mongolia
Criteria include social, economic and cultural heritage, which have some relevance to the sustainable development of Mongolia’s intangible culture, however overall the certification may not be of particular relevance to Mongolia’s inbound tour operators. Details of the most relevant criteria on Respecting Local Communities are provided in Annex 2.
4.5.3 The Rainforest Alliance [www.rainforest-alliance.org](http://www.rainforest-alliance.org)

The Rainforest Alliance has a family of trademarks including Rainforest Alliance Certified, Forest Stewardship Council Logo and for tourism companies, Rainforest Alliance Verified.

The Rainforest Alliance Verified mark is given to tourism companies that demonstrate progress toward minimizing their environmental footprint and supporting workers, local cultures and surrounding communities.

The Rainforest Alliance does not run its own certification scheme. However it works with hotels, inbound and outbound tour operators and other tourism businesses to help them improve their environmental, social and economic practices.

Through training and technical assistance, the Rainforest Alliance teaches businesses how to operate sustainably and verifies their progress toward this goal. Those enterprises that meet the requirements are eligible to receive promotional benefits, including the use of the Rainforest Alliance Verified™ mark.

The standards used for tourism operations has been recognized by the Global Sustainable Tourism Council (GSTC), see Section 4.4. The standards incorporate three key areas: Business Management; Sociocultural and Environmental Fields.

Details of the relevant criteria, Principle SC3 to Respect Local Cultures and People are provided in Annex 2.

**Summary**
The Rainforest Alliance Verified mark is not based on a certification scheme but recognises the efforts of tourism businesses to work towards internationally recognised sustainable tourism practices. It also provides training to support businesses in achieving these goals and provide marketing support to verified businesses. The verification process includes principles based on respecting local cultures and people.

**Relevance to Mongolia**
The principles which Rainforest Alliance use to support sustainable tourism could be applied to Mongolia. However they are currently primarily focused on communities based in rainforests and concentrate their resources in Latin America and the Caribbean. However the approach taken by the Rainforest Alliance could provide useful guidance if a verification scheme were to be taken forward in Mongolia.

4.5.4 Travelife [www.travelife.org](http://www.travelife.org)

Travelife Sustainability System works with accommodation providers, destinations, tour operators and travel agents. It focuses its activities on tour operators because their position, between suppliers and buyers, enables them to influence consumer demand, procurement policies and the development of destinations. Travelife offers two sustainability systems, one aimed at travel companies and the other designed for accommodations.

Travelife provides training management and certification for tourism companies to help them manage and improve their social and environmental impacts by complying with sustainability criteria. The sustainability themes include Community Relations, Cultural Impacts, Excursions and Activities, which promote the support of handicrafts, community development projects, local food production and social projects.
Summary
The system encompasses hotels and accommodations but is targeted primarily at tour operators. Members include TUI Travel, Thomas Cook, Kuoni, Cosmos and Virgin Holidays as well as smaller operators. The purchasing power of these large operators and the scheme's requirement that they need to use accredited suppliers increases pressure on accommodation and other suppliers to become accredited.

The scheme is internationally recognised with accredited businesses in Africa, Asia, the Americas and Europe.

Relevance to Mongolia
The large international tour operators with Travelife accreditation require sustainability credentials from their suppliers and prefer to contract with accredited accommodation providers. If Mongolian businesses want to supply these companies they will need to ensure they take the necessary action on sustainability. Travelife is a scheme that is well recognised globally and incorporates training and capacity building tools for guides and group leaders however it would be necessary to see if the scheme could be adapted to be appropriate for smaller community-based Mongolian suppliers.

4.6 Country Based Ecotourism Certification and Accreditation Programmes

Ecotourism certification schemes are mostly developed on a national or regional basis so they can address relevant local issues. A number of countries lead the way in terms of certification programmes for eco businesses including tourism businesses. Some of these programmes are useful examples of good practice. The three examples detailed below are in Australia, South African and Sweden. They have been chosen because they incorporate the management of cultural and community-based tourism as well as environmental sustainability, which is the main focus of many sustainability programmes.

4.6.1 Ecotourism Australia www.ecotourism.org.au

Ecotourism Australia (EA) is a not for profit organisation that is focused on inspiring environmentally sustainable and culturally responsible tourism. To achieve this, it works closely with their members who deliver quality experiences that follow ecotourism principles. Their core function is the design and delivery of certification programs bringing quality through ecotourism best practice and reassurance to travellers.

Ecotourism Australia works with ecotourism operators (accommodation, attractions and tour operators), protected area managers and other government agencies (State & Federal), local and regional tourism associations and tourism planners.

The certification programmes they operate include:

- Eco Certification
- Respect Our Culture (ROC) Certification
- EcoGuide Certification


To be eligible for ROC Certification a business needs to show:

- 75% of time is spent directly experiencing cultural areas or receiving cultural interpretation
- The majority of each customer’s activity time is spent within a cultural area or with a cultural focus
- The prime focus of the product is a presentation of the cultural values of the local area
- The product helps customers to directly and personally experience culture and do so without causing damage.

The EcoGuide program covers both generic guiding skills and EcoGuide specific minimal impact skills.

Generic Guiding skills:

- Knowledge of the tourism industry
- Knowledge of the roles and responsibilities of a guide and in particular an EcoGuide
- Communication skills
Safety, OH&S and risk management
Group management
Developing and delivering tour activities
Knowledge of subject matter

EcoGuide Specific Skills:
- Planning and implementing minimal impact principle
- Commitment to ongoing professional development
- Ensuring activities respect Aboriginal culture and follow appropriate protocols regarding sharing of information on Aboriginal culture

Summary
No detailed information on the criteria was available, however both the ROC and EcoGuide programmes could provide guidance for developing programmes in Mongolia.

Relevance to Mongolia
Nation specific guidelines that relate directly to respecting an indigenous culture and to guides in protected landscapes and which are designed for tour operators and other tourism businesses, as well as accommodation providers.

4.6.2 South Africa: Fair Trade Tourism (FIT) www.fairtrade.travel

FTT is a non-profit organisation in South Africa that promotes sustainable tourism development through awareness raising, research and advocacy, capacity building and by facilitating the world’s first tourism Fair Trade certification programme.

FTT operates the world’s first and only Fair Trade Tourism certification programme. The programme was developed 10 years ago and became the first tourism certification programme in Africa to be recognised by the Global Sustainable Tourism Council in December 2011.

FTT awards the use of special label to qualifying businesses as a way of signifying their commitment to Fair Trade criteria including fair wages and working conditions, fair purchasing, fair operations, equitable distribution of benefits and respect for human rights, culture and environment. By electing to stay at or use the services of an FTT-certified establishment, tourists are assured that their travel benefits local communities and economies, and that the business is operated ethically and in a socially and environmentally responsible manner. www.fairtrade.travel

Summary
A national certification scheme for South Africa built on the principles of fair trade.

Relevance to Mongolia
The emphasis on the equitable distribution of tourism benefits to local communities could be relevant to developing a Mongolian Fair Trade Tourism scheme.
4.6.3 Sweden: Nature’s Best www.naturesbestsweden.com

Nature’s Best was the first national quality label for ecotourism in the northern hemisphere. It was launched during the UN International Year of Ecotourism in 2002. Nature’s Best certifies and promotes the best Swedish tour operators and is a guide to the best nature tours in Sweden. It lists the operators who “go the extra mile for their landscape, local people, the environment and most importantly for you as a customer.”

The basic principles which Nature’s Best ensure are fulfilled by certified tour operators are:
- Respect the limitations of the destination – minimise negative impact on nature and culture.
- Support the local economy.
- Make all the company’s operations environmentally sustainable.
- Contribute actively to conservation.
- Promote the joy of discovery, knowledge and respect.
- Quality and safety all the way through.

The Swedish Ecotourism Society and VisitSweden back the Nature’s Best quality label.

Summary
A Swedish ecotourism certification scheme that operates with the national tourism authority and promotes ecotourism businesses as well as undertaking the certification.

Relevance to Mongolia
The strong nature based product has similarities to Mongolia’s offer e.g., dog sledding, bird watching, horse riding, hunting kayaking, Sami adventures. It is a good example of a scheme that is promoting the businesses it certifies.

4.7 Organisations and Associations

There are various international organisations that provide resources, guidance and case studies on sustainable certification; some of the most widely recognised ones are listed below.

The International Ecotourism Society (TIES) www.ecotourism.org

TIES is a non-profit association with a global network of ecotourism professionals that spans more than 120 countries. It is committed to promoting responsible tourism practices that make tourism a viable tool for conservation, protection of biocultural diversity, and sustainable community development. It does not run a certification scheme but is a good resource for guidelines and standards, training, technical assistance, and educational resources.

TIES, together with the Rainforest Alliance and the Centre on Ecotourism and Sustainable Development have developed a series of four handbooks on using, funding, marketing and financing certification. Handbook 1, the User’s Guide, is designed for those who have heard about certifying sustainable tourism and ecotourism and want to understand how it works or how to begin the process.

Tourism Concern www.tourismconcern.org.uk

Tourism Concern campaigns for more ethical tourism through campaign, informing and supporting communities in destination countries. Its website includes resources and case studies.

International Council on Monuments and Sites www.icomos.org

ICOMOS is a non-governmental international organisation dedicated to the conservation of the world’s monuments and sites. It has an International Committee on Intangible Cultural Heritage (ICICH). The objectives of ICICH are to promote international cooperation in the identification, study and solution of issues related to the ethical identification, protection, interpretation, and management of the intangible cultural associations attributed to monuments and sites.

Centre for Responsible Travel (CREST) www.responsibletravel.org
CREST employs policy-orientated 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.

CREST operates Travelers’ Philanthropy (www.travelersphilanthropy.com) to develop better connections between travellers who want to give back to their destinations and tour operators with close ties to communities and an understanding of what a region needs most from its visitors. It has produced a guide, Tips for Travelers, to highlight some of the Do’s and Don’ts of responsible giving.

4.8 International Best Practice Case Studies

The three case studies below highlight issues that are important for Mongolia to consider as it develops a cultural tourism strategy.

- a) The importance of government support for developing a sustainable destination
- b) Lapland’s quality mark for Sami heritage tourism
- c) Tourism Australia’s approach to promoting indigenous Aboriginal tourism.

4.8.1 Costa Rica: Government Led Sustainability Accreditation Scheme

The benefits of a destination achieving widespread sustainability accreditation by its tourism businesses are reflected in Costa Rica’s market position as the foremost ecotourism destination in the Central American region.

Most countries in Central America have the natural assets and cultural and community heritage to offer a nature and community based holiday. However, Costa Rica has built up its reputation as the leading ecotourism destinations in the region.

The key to offering an ‘ecotourism’ holiday, rather than just a nature based activity holiday, depends on the sustainable management and operation of accommodation and activity providers and their relationship with local communities.

Costa Rica has the most established sustainability certification in the Central America, which underpins quality and promotion of its ecotourism product.

The Costa Rican Institute of Tourism (ICT) has established a Certification for Sustainable Tourism (CST) programme www.turismo-sostenible.co.cr that provides tourism businesses with sustainability accreditation. CST is regulated by the Costa Rican National Accreditation Commission and consists of a scale of 5 “levels” of sustainable tourism achievement.

To encourage businesses to participate in the programme ICT supports the organisations that deliver the accreditation scheme training. The training is therefore provided free of charge to businesses.

In addition to supporting the cost of certification, businesses are incentivised to achieve sustainability accreditation by being rewarded with discounts on the cost of attending trade fairs. The amount discounted is based on the level of accreditation achieved. Businesses that attain Level 5 are fully subsidised to attend international trade fairs.

The businesses themselves believe that accreditation adds value to a business and helps buyers to positively differentiate businesses holding the certificate from those that don’t have accreditation.

In addition to driving improved sustainability practices across the country, this well-established and coordinated approach to sustainability accreditation means that the majority of businesses that attend international trade fairs are accredited; Costa Rica presents itself to the international trade as a well-coordinated ecotourism destination.
As new nature and adventure destinations in the region, such as Nicaragua and Belize, start to enter the marketplace, Costa Rica’s strong position with an accredited tourism sector enables it to continue to proactively market itself as an ecotourism destination to new markets such as China.

A nationally supported accreditation scheme in Mongolia could provide its cultural tourism product with a strong market position for quality compared to neighbouring destinations that offer similar products.

4.8.2 Lapland: Sápmi Experience Quality Label

Sápmi (or Lapland) has long attracted visitors from all over the world, and today it is visited by millions of tourists every year. In spite of this bustling tourist activity, and even though Sámi traditions are frequently portrayed through various media, there are very few successful Sámi tourism companies. The Sámi community wants to become more involved with decision making in the Swedish tourism industry.

Visit Sápmi’s (www.visitsapmi.com [https://www.facebook.com/visitsapmi]) is owned by the Swedish Sámi Association. Visit Sápmi’s vision is to develop tourism that gives money back to Sámi communities, developed in a more respectful and sustainable way than is currently happening, and to collaborate with partners that share the same belief that sustainability is the right path for the future for the Sámi people. Together with Gaaltije South Sámi Information Centre, Sápmi Experience has been developed to promote responsible and sustainable Sámi tourism.

Sámi tourism must be sustainable over the long term. This means that tourism must be accepted and established, culturally and socially, in Sámi society, and the host must be able to communicate Sámi values and way of life.

Launched by Visit Sápmi, the Sápmi Experience program promotes responsible practices and unique encounters that "bring joy, pleasure and excitement." Tourism activities under the Sápmi Experience Quality Label are based on the common heritage of the Sámi.

Companies that have been awarded with this mark demonstrate a holistic approach to the Sápmi living environment, are knowledgeable about this region and its residents, and can offer professional arrangements to people visiting Sápmi.

Visitors can be sure that companies bearing the Sápmi Experience Quality Mark offer genuine Sámi experiences and coordinate activities with local hosts. Tourism activities recognized by the Sápmi Experience Quality Mark are based on the common heritage of the Sámi living environment. Sápmi Experience approved companies include:

- **Renbiten**: A small Sámi-owned and operated tourism company featuring exclusive Sámi crafts, art and many fine gift ideas, and sharing the stories of Sámi, “the people of eight seasons”. Renbiten specializes in offering travellers "the silence, calm and opportunity for the soul to find peace.”

- **Njarka Sami Camp**: Situated in the Lake Häggsjön region, Åre Municipality, Jämtland, Njarka Sami Camp features a peaceful and harmonious natural setting where reindeer wander freely among the traditional Sámi huts and in the sparse forest. The owners Maud and Mattias Mattsson welcome travellers to experience their land, not by showing them the traditional Sami national clothing, but by showing today’s Sámi lifestyle.

- **Åjtte - Svenskt Fjäll och Samemuseum** (Åjtte Museum in Jokkmokk – the Sami centre): The museum tells the story of Sápmi, the land and the people, of life and survival in a demanding climate and environment. It is a story set in the wetlands, forests and mountains. A modern and tasteful approach to the Sámi story, the museum offers a great opportunity for travelers to gain knowledge and to explore the culture, history and heritage of the Sámi people.
4.8.3 Aboriginal Tourism Australia


Tourism Australia includes information on Aboriginal tourism through its promotional activities with the aim of encouraging the trade to include a distinctive Aboriginal experience in their Australian itineraries.

These experiences are built around having knowledgeable Aboriginal guides to show visitors a side of Australia they wouldn’t otherwise experience. The Indigenous Tourism Champions Program (ITCP), a collaborative national programme instigated by Tourism Australia and Indigenous Business Australia with significant involvement and support from the State and Territory Tourism Organisations, supports indigenous guides and tourism businesses.

The programme aims to build a reputation of reliability and consistent quality in service delivery. The ITCP is achieving this through only marketing products that have met stringent criteria, ensuring that the businesses being promoted are able to meet the needs and expectations of trade and the international market.

Tourism Australia’s approach to developing Aboriginal tourism is built on developing indigenous guiding skills and quality services to ensure it can meet the expectations of domestic and international visitors.

4.9 Tour Guides

4.9.1 The Importance of Tour Guides

The professionalism of the guides is key to giving the visitor a good experience. They are the mediator between the communities they work with and the tourists.

The experience the visitor has of Mongolia’s living heritage is heavily dependent on tour guides who act as the interface between the visitor and the natural and cultural experiences they encounter. Guides are:

- The principle providers of visitors’ education about the natural and cultural resources – through telling cultural rich stories, narratives and myths
- Key to conservation and protection of resources
- Enforcers of policies that protect host cultures and people
- Often the principle recipients of financial benefits to the local area
- Largely responsible for the visitor having an enjoyable and fun trip.

Despite the importance of the guide to the success of a visit, the tourist usually knows very little about their potential guide before making a decision to book with an organisation. This lack of information can stem from:

- Ignorance about the important role the guide will play
- Not knowing where to find relevant information about the guide that will accompany a tour.

The social media analysis undertaken for this report clearly highlighted the demand from independent travellers for information and recommendations for good guides.

However requests on TripAdvisor for recommendations for good guides generated self-promotion by guides, which is not permitted on TripAdvisor forums. These posts were therefore removed from the forum leaving visitors with no further information on how to find a well-recommended guide.

Creating a professional well-regulated tour guide sector in Mongolia is a priority to ensuring consistently high quality visitor experience particular of Mongolia’s living cultural heritage.
This area needs further research and development with participation from the relevant stakeholders in Mongolia to establish a national tour guide association to regulate the sector. The World Federation of Tourist Guide Associations (www.wftga.org) aims to provide impartial advice to tour guide associations.

Some initial issues relating to guide licensing and general standards for ecotourism guiding are outlined in the next two sections.

Guides need to bring people who don't know each other together - so they need to be skilled with people. Also the guides have to be competent, to be able to rescue situations such as finding alternative accommodation when internal flights are cancelled, and need to have hands-on practicality.

Niche Tour Operator working with American and European clients

4.9.2 Guide licensing and permitting

Licensing can be an effective way to set standards and provide assurance of reasonable guide quality. However this depends on rigorous standards being set that incorporate different levels of guiding experience and knowledge, and that licences are revoked for poor performance. Lack of enforcement or relevant standards undermine licencing as an indicator of quality.

Rigorous licensing can make it extremely difficult for indigenous people to qualify for a licence and can favour more formally educated foreign or metropolitan residents. This can lead to a poor experience for the visitor and limits the tourism benefits to local communities.

Independent travellers and tour operators comment that guides in Mongolia are often from the metropolitan areas and may be students with little knowledge of the lifestyle and traditions of the nomadic communities visited.

In Mongolia, the Tourism Law (enacted in 2000 and under review) includes tour guide regulations: "Regulation of the Classification and Grading of Tour Guides"6.

This regulation relates primarily to guides to cultural heritage sites and stipulates that tour guides have to be classified and graded according to their experience, knowledge and skills, including their knowledge of Mongolian culture and art. There is no specific classification for intangible cultural tour guides.

If the Government does not support regulation, alternatives could be:
   i) To establish a non-profit, industry group or company that recommends standards and practices for guides. This can be effective if there are strong guidelines and good cooperation with local tour operators. However it will not be effective if guides or local tour operators chose to ignore the guidelines and there are not direct penalties.
   ii) Individual companies follow internal or external guidelines to minimize impacts on local cultures and biophysical resources.

A working group could be established to discuss appropriate options for developing a professional guiding sector. The issues to be addressed by a working group are outlined in the next section and in Appendix 3.

4.9.3 General standards for guiding

General performance standards should be considered for eco-cultural tour guides and tour operators.

The guidelines in Annex 3 are based on the Ecotourism Society guidelines for nature tour operators. These guidelines are general and need to be reviewed and revised to make them more relevant to guides of Mongolia's living heritage. However they are a useful starting point for creating a set of guidelines that are relevant.

In developing tour guide standards, particular consideration should be given to guides from rural areas and local communities who can provide high quality experience but lack financial resources or promotional expertise.

Guides need to understand the expectations of the visitor as well as being knowledgeable about the region and local communities visited.

---

6 Enacted by the order No. 149, 15 May. 2002
Tour operators could put profiles of their guides on their websites highlighting their interests and experience, the regions they are most knowledgeable about, the languages they speak, with a facility for clients to post reviews about their guide.

An online guide portal could:
- Generate a useful resource for both independent travellers and outbound tour operators
- Use peer-to-peer reviews to drive up standards
- Encourage improved training
- Generate pride amongst guides in their profession

There are a growing number of online 'Find a Guide' portals but there are very few listings for Mongolian guides. In future, it will be important that any guide listed on online portals is well qualified and can provide visitors with a high quality experience.

4.10 Educating Visitors

Attracting the 'right kind' of visitors, the market segments that will enjoy and appreciate the authentic Mongolian way of life, is a key element to being able to meet visitor expectations and delivering a good experience for them.

It is important to ensure visitors are well informed about what to expect from their trip before they book their holiday. It is also important that they understand how their behaviour impacts on local communities and the environment.

Providing this information on tourist board and business websites will help potential visitors to decide if Mongolia is a destination that will appeal to them and the type of holiday they are looking for. As the independent traveller market grows, there is a growing need for these visitors to take responsibility for their actions.

Some destinations have developed their own Visitor Code of Ethics and there are some general guidelines for visitors. The General Sustainable Tourism Council has produced Travel Tips for visitors, which are provided in Annex 4.7

CREST’s Traveller’s Philanthropy project has also produced a set of Travel Tips for Travellers8 and The Dos and Don’ts of Travel Giving.

“We seek travelers who are willing to share this unique Mongolian experience with us and help provide ideas for our local partners - often herdsmen themselves - to develop a kind of ecotourism adapted to the Mongolian situation.”

Nomadic Journeys website

4.11 Guidance for Establishing Community-Based Tourism Businesses

Key elements to setting up a successful community-based tourism business include: participation, empowerment, cultural revitalization, natural resource management, commercial profitability and patience; expect it to be a long-term process. Each business will have different issues and have different problems to solve.

Annex 5 provides an overview of the some of the issues to address is setting up a community-based business including: Product Development, Marketing, Community and Private Sector Partnership, Fair Trade in Tourism, Financing Community Based Tourism.

4.12 Summary and Recommendations

Specific recommendations for developing sustainable accreditation for cultural tourism are to:
- Use relevant sustainability guidelines eg, the Geotourism Charter, to establish a framework for developing a certification programme in Mongolia.
- Set up partnerships with the public and private sector to establish how a sustainability accreditation and other programmes could be developed.
- Contact sustainability organisations and other destinations that have relevant schemes to get advice and discuss the pros and cons of each scheme and its applicability to Mongolia. In particular assess how applicable Travelife would be to Mongolia’s cultural and community businesses.

7 www.gstcouncil.org/resource-center/responsible-travel-tips.html
8 www.travelersphilanthropy.org/travel-tips/for-travelers.shtml
Establish a working party of tourism sector stakeholders to address how a professional well-regulated eco-cultural tour guide sector could be established and how cultural guides could be accredited in a way that is inclusive of nomadic community expertise.

Develop a set of Travellers Tips or Code of Ethics to inform people about Mongolia’s nomadic lifestyle and how they can better understand the local community lifestyle and heritage.

Distribute the Traveller Tips widely amongst the sector and ensure they are on business websites and tourist board’s website, so they can be used by the travel trade and independent travellers.

Overarching actions required to develop a sustainable tourism sector in Mongolia:

- A well-defined institutional structure is required with the Ministry responsible for policy and a National Tourism Board established to regulate, develop, promote and monitor the sector, working closely with the private sector.

- The production and delivery of a Sustainable Tourism Master Plan for Mongolia to provide co-ordination and guidance across the sector, including defining the appropriate institutional roles for existing tourism organisations and sector associations (eg, the Sustainable Tourism Development Centre, a tour guide association, ecotourism accreditation system); the legal framework and the development of standards and regulations; research and statistics; spatial planning and product development; culture and heritage; human resources and marketing.
5. **RECOMMENDATIONS FOR DEVELOPING CULTURAL TOURISM**

5.1 **Cultural and Community Tourism Product Development**

The quality of engagement with local communities is at the heart of a good visitor experience for the vast majority of North American and western European visitors, as well as for most visitors from Japan and some first time or high-end visitors from Russia.

For the majority of regional visitors from northeast Asia, the nomadic experience is of interest but of lesser importance than the natural environment, the adventure activities and visiting Mongolia’s tangible cultural sites.

Mongolia already has some very good examples of community-based tourism products built on pastoral skills and nomadic heritage. The governance and regulatory environment needs to be structured to enable the development of these examples of best practice.

Land use and spatial planning, for example, needs to be developed in each region to identify which areas should be protected, allowing only small scale development in conjunction with local communities; and where larger scale developments can be accommodated with causing detriment to the environment or visitor experience.

Developing the industry along sustainable tourism principles will not only help to preserve what is special and unique about Mongolia’s landscape and pastoral traditions, it will also help to drive quality across the tourism sector.

The perceived threats of neighbouring destinations offering similar nomadic experience could also be addressed by building on best practice and ensuring quality throughout the sector. If Mongolia can offer a better quality, better value nomadic experience than Kyrgyzstan for example, it will receive positive feedback and reviews from visitors and enhance its position as the nomadic destination of choice. An well informed and well co-ordinated marketing campaign will also be required, led by a National Tourism Board.

Marketing strategy should be informed by robust market intelligence and should be focused on attracting the market segments that are most likely to appreciate and respect what is distinctive and unique about Mongolia.

The risks of not developing Mongolia’s cultural tourism along sustainable principles will lead to increasing destruction of Mongolia’s social cohesion and nomadic traditions, extinguishing the country’s USP and the main reason visitors coming to Mongolia.

The following section suggests actions that could help develop a sustainable destination to support a high quality cultural tourism product and spread the benefits of tourism more widely.

5.2 **Recommendations for Action**

**Build Partnerships**

- Collaboration in tourism is central to developing a sustainable destination.
- Work together: Public and Private Sector, Community groups and NGO collaboration
  - Public-private
  - Public-public – all organisations involved in tourism need to work together
  - Private-private – between outbound and inbound tour operators, hoteliers, activity providers, and communities
- Local people ‘ambassadors’ need to be included in the decision making process.

**Public Sector to Lead**

- Establish a governance model that brings all industry stakeholders together
- Establish a professional National Tourism Board for the overall management, research, development, promotion and marketing of the destination.
- Build sustainability into government policy: a tourism master plan or development strategy, marketing strategy etc.
- Land Use Management
  - Spatial development planning in each region needs to identify key destinations and protect them. Control of lodge and ger camp development is required so tourism benefits can be spread and the visitor experience improved.
• Produce clear guidance for tourism sector on how to improve benefit to local communities
  o Recommendations should provide small, specific projects that tour operators and businesses should focus on eg, training and tour operator co-operation.

• Market Intelligence and Business Support
  o Existing research and tourism sector market expertise can be collated to provide resources for businesses wanting to target new markets.

• Regulate and train guides and drivers
  o Professionalism of the guides is key to a good visitor experience
  o Drivers are also an important element of the visitor experience, requiring good language skills, organisational skills and efficiency
  o Establish a national tour guide association.

• Enforce regulations to drive quality service and improve the visitor experience

Private Sector to Lead

• Differentiate product
  o Build product on nomadic skills eg, archery, hunting, fishing, riding, trekking

• Be an Expert
  o Local tour operators need to focus on specific destinations in Mongolia, rather than offering a full range of geographical tours.

• Build local community partnerships
  o In-depth knowledge of a region enables operators to build up relationships with local suppliers and work more closely with local people.

• Aim to attract the ‘right type of visitor’
  o Target market niche segments

• Understand and match visitor expectation
  o Explain services and facilities visitor should expect
  o Don’t oversell, good reviews will be generated by visitors whose expectations have been exceeded - "Under sell and over deliver"

• Train tour operator staff
  o Ensure staff have a good understanding of local and regional cultural tourism products. Often their knowledge is limited and they are not able to advise international tour operators or independent travellers of the most appropriate community tourism projects to visit.

• Include guide profiles and details on website

• Identify niche outbound tour operator partners in target markets
  o Specialist outbound operators are more likely to attract appropriate clients and repeat business than mainstream operators.
# ANNEX 1 | TOURS OFFERED BY INBOUND TOUR OPERATORS EXHIBITING AT WTM 2014

<table>
<thead>
<tr>
<th>Tour Operator</th>
<th>Types of Tours</th>
<th>Cultural tourism</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Active Adventure Tours/ Tour Mongolia</strong>&lt;br&gt;www.tourmongolia.com</td>
<td>Trekking x 2&lt;br&gt;Discovery x 2&lt;br&gt;Horse Riding x 3&lt;br&gt;Cultural x 3&lt;br&gt;Community Based Tours x 3&lt;br&gt;Special x 7&lt;br&gt;Event x 8&lt;br&gt;Short x 3</td>
<td>11 specific intangible cultural event and CBT trips.&lt;br&gt;Interaction with nomadic people also central to riding tours and short trips.&lt;br&gt;Brochure includes full details of collaborations with nomadic communities and type of experience to expect.</td>
</tr>
<tr>
<td><strong>Great Genghis Tours and Expeditions</strong>&lt;br&gt;www.greatgenghis.com</td>
<td>Adventure, Culture and Festival tours:&lt;br&gt;Ancient Cultures of Western Mongolia&lt;br&gt;Camel festival and Lunar New Year&lt;br&gt;Camels and Monasteries&lt;br&gt;Classic Mongolia&lt;br&gt;Driving Through Land of Genghis Khan&lt;br&gt;Gobi Tours x 3&lt;br&gt;Highlights of Mongolia&lt;br&gt;Naadam Festival&lt;br&gt;National Park Tour&lt;br&gt;Experiencing Nomad Life&lt;br&gt;The Beauties of the Gobi Lake and Mountains</td>
<td>Five specific ‘tangible’ cultural tours; three ‘intangible’ culture tours. Although over tours incorporate visits to nomad families.&lt;br&gt;Experiencing Nomad Life includes 2 days staying with a nomad family in Terelj but limited additional information on website.</td>
</tr>
<tr>
<td><strong>Juulchin Tourism Corporation of Mongolia</strong>&lt;br&gt;www.juulchin.com</td>
<td>Group&lt;br&gt;Classic&lt;br&gt;Comfort x 4&lt;br&gt;Cultural&lt;br&gt;Back to the 13th Century&lt;br&gt;Diverse Cultures of Western Mongolia&lt;br&gt;Mountains and Monasteries&lt;br&gt;Naadam and Nomadic Life&lt;br&gt;Nomad’s Cultural Legacy&lt;br&gt;Adventure&lt;br&gt;Photos and Drama&lt;br&gt;Special Interest x 6&lt;br&gt;Nomadic Life in Photos&lt;br&gt;Shaman and Tsaatan&lt;br&gt;Bird watching, Climbing Fishing, Mountain Biking, Photography, Riding, Day and Short trips&lt;br&gt;Festivals and Events: Eagle, Ice, Naadam, Tsaatan</td>
<td>Tangible and intangible culture features strongly in most tours.&lt;br&gt;Detailed information about activities with nomadic families included on itineraries.&lt;br&gt;Prominent quality statements on website about company commitment to quality of guides, interpreters and drivers. Aim to meet client expectations.</td>
</tr>
<tr>
<td><strong>Selena Travel</strong>&lt;br&gt;www.selenatravel.com;&lt;br&gt;www.mongoliatours.com</td>
<td>Mongolia Discovery x 3&lt;br&gt;Cultural and Festival x 3&lt;br&gt;Community-based tours&lt;br&gt;Mongolia Adventure Tours x 3&lt;br&gt;Horse Trekking, Wildlife Safari, Trekking Nature and Wildlife x 3&lt;br&gt;Special Interest x 2&lt;br&gt;Honeymoon and wedding photography&lt;br&gt;Short and Winter x 3&lt;br&gt;Nomad family stay&lt;br&gt;Tailor Made and Private</td>
<td>Specific tangible and intangible culture tours. Elements incorporated in other tours.&lt;br&gt;Information on Responsible Travel and commitment of company to supporting and involving nomadic communities.&lt;br&gt;Brochure includes CBT tours and information on supporting the local community</td>
</tr>
<tr>
<td><strong>Tsolmon Travel</strong>&lt;br&gt;www.tsolmontravel.com</td>
<td>Adventure x 12&lt;br&gt;Round trips x 3&lt;br&gt;Trekking tours x 3&lt;br&gt;Camel Trekking&lt;br&gt;Riding x 5&lt;br&gt;Special x 7&lt;br&gt;Fishing, Monastery, Bird watching; Climbing Tour, Rock climbing, Mountain Bike Tour, Botanical Tour Classic&lt;br&gt;1Short tours from UB x 3&lt;br&gt;Packages x 6&lt;br&gt;Tours to Central, South, North&lt;br&gt;Events x 5</td>
<td>Predominately nature, adventure and special interest tours.&lt;br&gt;One tangible culture Monastery tour plus Festival tours.&lt;br&gt;No specific information about is provided about guides or type of nomadic experience or community involvement</td>
</tr>
<tr>
<td>Naadam x 3 tours</td>
<td></td>
<td></td>
</tr>
<tr>
<td>------------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lunar and Mongolian New Year tours</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Key**

- **Intangible culture tours are listed in red**
- **Tangible culture tours are listed in blue**
ANNEX 2  SUSTAINABILITY CERTIFICATION CRITERIA FOR COMMUNITY TOURISM

1. **Green Globe** [www.greenglobe.com](http://www.greenglobe.com)

The certification covers four areas:
- **A. Sustainable Management**;
- **B. Social/ Economic**;
- **C. Cultural Heritage and**
- **D. Environmental**.

Section B, Social and Economic, identifies the criteria for 9 areas for action: Community Development; Local Employment; Fair Trade; Support Local Entrepreneurs: Respect Local Communities; Exploitation; Equitable Hiring; Employee Protection and Basic Services.

The criteria that has particular relevance to developing Mongolia’s living heritage includes:

**B.5 Respect Local Communities**
- **Criteria**: A code of conduct for activities in local communities has been developed, with the consent of and in collaboration with the community.
- Respecting and preserving the traditions and property of local populations is an important aspect in terms of today’s globalization. Codes of conduct for tourism activities that are developed in concert with local communities, respecting the principle of prior informed consent and the right of communities to say “no” to tourism activities is key to the long term viability and sustainability of the community and its environment. Tourism businesses should develop a plan to maintain regular and open communication with community officials to create a cooperative agreement that accounts for tourist interaction with the peoples and passage through the local communities.

Under Section C. Cultural Heritage, there is reference to the need for tourism businesses to develop a Code of Behaviour that respects local cultures and provides advice on how to incorporate culture into the visitor experience:

**C1. Code of Behaviour**
- Respect for local cultures and historic locations must be observed. Businesses must also understand and actively seek to minimize the impact on built and natural environments caused by increased visitor activity.
- Education about local people’s cultural customs, mores, and beliefs as well as appropriate verbal and non-verbal behavior will contribute to overall appreciation of the site and local community pride.

**C.4 Incorporation of Culture**
- The business uses elements of local art, architecture, or cultural heritage in its operations, design, decoration, food, or shops; while respecting the intellectual property rights of local communities.
- **Utilizing aspects of the local culture wherever possible increases ties to the neighboring community and promoting the destination’s unique character provides an incentive to preserve unique skills that may otherwise vanish.**
- **The communication between community leaders and companies is the key point to ensure a respectful use of local culture (e.g. sacred elements) and avoid possible wrong interpretations, conflicts, and undesirable commoditization.**

2. **The Rainforest Alliance** [www.rainforest-alliance.org](http://www.rainforest-alliance.org)

The standards used for tourism operations has been recognized by the Global Sustainable Tourism Council (GSTC), see Section 4.4.1. The standards incorporate three key areas: Business Management; Sociocultural and Environmental Fields.

The Sociocultural Field includes **Principle SC.3**, to Respect Local Cultures and People:

**Principle SC.3 Respect to Local Cultures and People**

**Outcome**: Local people maintain and value their customs, cultures, and other socio-cultural manifestations.

**Criterion SC.3.1.**

(Mandatory or Critical Criteria) The business ensures respect for the customs, cultures, and other sociocultural manifestations of its community.

**Outcome**: Local people maintain and value their customs, cultures, and other sociocultural manifestations.
National Geographic Society has also drawn up a “Geotourism Charter” based on 13 principles:

- It provides clients with information regarding conduct codes that must be adhered to in public and private areas within the local culture and areas that are visited.
- Together with local and/or indigenous communities, the company defines the rules of conduct that both visitors and employees of the company, must comply with, when visiting these communities.
- The business takes steps to avoid socially damaging behavior (drug consumption, prostitution, all types of child exploitation, etc.).
- The business recognizes that its basic service needs for operation (water, energy, food, etc.) affect the supply of these to the local community(ies) and assesses the degree of satisfaction that communities have about the initiatives promoted in their favour.

3. National Geographic Geotourism Charter

National Geographic Society has also drawn up a “Geotourism Charter” based on 13 principles:

- **Integrity of place**: Enhance geographical character by developing and improving it in ways distinctive to the local, reflective of its natural and cultural heritage, so as to encourage market differentiation and cultural pride.
- **Market selectivity**: Encourage growth in tourism market segments most likely to appreciate, respect, and disseminate information about the distinctive assets of the locale.
- **Market diversity**: Encourage a full range of appropriate food and lodging facilities, so as to appeal to the entire demographic spectrum of the geotourism market and so maximize economic resiliency over both the short and long term.
- **Tourist satisfaction**: Ensure that satisfied, excited geotourists bring new vacation stories home and encourage friends to experience the same thing, thus providing continuing demand for the destination.
- **Community involvement**: Base tourism on community resources to the extent possible, encouraging local small businesses and civic groups to build partnerships to promote and provide a distinctive, honest visitor experience and market their locales effectively. Help businesses develop approaches to tourism that build on the area’s nature, history and culture, including food and drink, artisanry, performance arts, etc.
- **Community benefit**: Encourage micro- to medium-size enterprises and tourism business strategies that emphasize economic and social benefits to involved communities, especially poverty alleviation, with clear communication of the destination stewardship policies required to maintain those benefits.
- **Protection and enhancement of destination appeal**: Encourage businesses to sustain natural habitats, heritage sites, aesthetic appeal, and local culture. Prevent degradation by keeping volumes of tourists within maximum acceptable limits. Seek business models that can operate profitably within those limits. Use persuasion, incentives, and legal enforcement as needed.
- **Land use**: Anticipate development pressures and apply techniques to prevent undesired overdevelopment and degradation. Contain resort and vacation-home sprawl, especially on coasts and islands, so as to retain a diversity of natural and scenic environments and ensure continued resident access to waterfronts. Encourage major self-contained tourism attractions, such as large-scale theme parks and convention centers unrelated to character of place, to be sited in needier locations with no significant ecological, scenic, or cultural assets.
- **Conservation of resources**: Encourage businesses to minimize water pollution, solid waste, energy consumption, water usage, landscaping chemicals, and overly bright nighttime lighting. Advertise these measures in a way that attracts the large, environmentally sympathetic tourist market.
- **Planning**: Recognize and respect immediate economic needs without sacrificing long-term character and the geotourism potential of the destination. Where tourism attracts in-migration of workers, develop new communities that themselves constitute a destination enhancement. Strive to diversify the economy and limit population influx to sustainable levels. Adopt public strategies for mitigating practices that are incompatible with geotourism and damaging to the image of the destination.
- **Interactive interpretation**: Engage both visitors and hosts in learning about the place. Encourage residents to promote the natural and cultural heritage of their communities so tourists gain a richer experience and residents develop pride in their locales.
- **Evaluation**: Establish an evaluation process to be conducted on a regular basis by an independent panel representing all stakeholder interests, and publicize evaluation results.
ANNEX 3 GENERAL PERFORMANCE STANDARDS FOR ECO-CULTURAL TOUR GUIDES

PRE-DEPARTURE - The tour operator should:

- Where possible provide a written comprehensive description and/or readings list about the cultural and ecological phenomenon a visitor might see.
- Describe general travel ethics and standards for visiting an area.
- Warn against bringing disposable goods that contribute to the solid waste problem or which are hazardous and cannot be disposed of properly.
- Educate about products to avoid that are illegally traded or made from endangered flora or wildlife.
- Explain how many of their guides are from the local area. Do they purchase most trip supplies from local area? These actions help spread economic benefits to local people.
- Describe the company’s contributions to the communities and protecting areas visited eg, in-kind support; explain how any financial support is managed through the community.

AT THE TRIP ORIGIN - Guides should:

- Provide a quality orientation on local culture and natural history
- Support protected area entrance fees and describe uses of funds collected

DURING THE ORIENTATION AND/OR ON THE TRIP - Guides should:

- Be bi-cultural and bi-lingual.
- Enable opportunities for interaction with local people
- Provide an authentic impression of the country through interpretation such as telling rich cultural stories, narratives and myths
- Describe common visitor cultural practices that are insulting to host cultures
- Allow opportunities for local non-profit CBT and conservation groups to talk with visitors
- Discuss threats to the protected areas and indigenous cultures
- Alert visitors to fragile environments and wildlife, and ways to avoid impacting them.
- Brief visitors on cultural and environmental guidelines specific to the area
- Present key protected area regulations
- Discuss sustainable methods for human waste and solid waste disposal.
- Discourage (often it is prohibited) collection of souvenirs from natural areas, such as bones and feathers, unless condoned by local authorities
- Encourage catch and release of fish and other game species, unless plentiful, used for meals, and/or part of local game management plan
- Discourage feeding or baiting of fish and wildlife to facilitate observation
- Discuss local resource management activities and programmes
- Avoid bringing groups into already crowded natural areas
- Warn against drug dealers, prostitution, or black markets
- Split large groups into smaller ones when visiting fragile areas
- Use accommodations and suppliers who comply with environmental regulations

BY END OF TRIP - Guides should:

- Describe ways visitors can become involved in protecting area from threats eg: in-kind opportunities, financial contributions, political action
- Encourage writing to organizations whose policies are damaging local areas or culture
- Provide a list of local environmental and conservation groups doing work in areas visited and describe ways visitors can assist them.
ANNEX 4  GSTC RESPONSIBLE TRAVEL TIPS

BEFORE TRAVELING
- Find out as much as possible. The more you know about a destination before arriving, the more the place will come alive. Look into the destination’s history, culture, natural environment, customs, legends, advisory notices and more.
- Learn a few words in the local language. Making an effort to speak the local language allows you to interact with the people who know the site best. People appreciate your efforts and your interest in learning. Simple words like “Hello,” “Please” and “Thank you” can go a long way.
- Pack light. It is tempting to pack everything you think you might need, but remember to be smart about your necessities.
- Lodging choices. Look for hotels that have a written policy covering their environmental impact, employment and cultural policy.
- Explore transportation options. Remember that traveling affects the environment. Wherever possible, try to minimize your pollution and impact on the environment by looking to alternative transportation and off-setting your carbon emissions.

WHILE TRAVELING
- Engage in local culture. The saying, “While in Rome do as the Romans” still applies today. Your trip provides a unique opportunity to explore a new culture and to see the world through a different perspective. Remember that eating local foods, shopping in local markets, and attending local festivals are all part of experiencing the culture.
- Buy local products and services. Choosing to support locally owned businesses, community tour operators, and artisans means that you’ll have a one-of-a-kind experience and your money will go directly to the community. Before purchasing goods, ask about their origin. Avoid buying products made from threatened natural resources and report poaching and other illegal activities to the local authorities.
- Refrain from aggressive bargaining. It’s often difficult to know your limits in bargaining so if you’re not sure, ask your local hotel for tips. Remember that the purchases you make directly affect vendors’ livelihoods, so decide if you really need to hang onto that extra dollar or if it could impact the vendor more.
- Hire local guides. Enrich your experience by choosing local guides who are knowledgeable about the destination. Ask local tour operators and hotels for good recommendations.
- Tread lightly. Destinations are exceptional due to their natural or cultural splendor. Do your part to keep them that way by following designated trails, respecting caretakers, and not removing archaeological or biological treasures from sites.
- Respect the natural environment. Reduce, reuse, and recycle. Even though you are just visiting and not paying the utility bill, disposing of your garbage properly and minimizing your consumption of water and energy will benefit the overall destination.

AFTER TRAVELING
- Distribute your responsible travel tips. In addition to telling family and friends about the wonderful memories you made, also consider sharing tips on how they too can positively impact the World while having an amazing journey.
- Share your photos. Pictures can say a thousand words.
- Explore more. Traveling is just the start of learning. Once you return home continue exploring and being involved with the issues or region that captured your attention.
- Give back. Traveling often opens your eyes and heart to something new. You can continue to preserve our world’s heritage by making a donation to a local charity.
ANNEX 5 GENERAL GUIDANCE FOR ESTABLISHING COMMUNITY-BASED TOURISM BUSINESSES

Product Development

- Capacity of community to take charge of running a project.
- Suitable location for a tourism project e.g., projects that are difficult to reach may not be sustainable, as most tourists do not have time to reach them. A location should offer some form of attraction to visitors. This could be a natural or cultural landscape, cultural traditions (e.g., architecture, handicrafts, art, music) or the opportunity for specific activities such as fishing or trekking.

Marketing

- Marketing Plan – local information networking, internet promotion, media and guidebook coverage, links with other projects, promotion through national tourism campaigns.
- Without good marketing a CBT project is unlikely to succeed, as it will not attract visitors.
- Local communities may not be set up to undertake the required marketing activities and may be reliant on partnership with tour operators.
- Government / tourist board assistance to:
  - Provide good market data
  - Promote community businesses on the destination website and in printed collaterals. However, the community will need to provide up-to-date information.

Partnership: Communities and private sector

- Local community projects are unlikely to have the skills or budgets to undertake press tours, attend trade fairs, develop a fully optimized website. Therefore, developing a strong working relationship with local tour operators is essential to creating links with the national and international tourism market.
- From the outset, the private sector and community should build up structures that enable the community to benefit and have decision-making powers over the type of tourism being offered.
- The relationship needs to be adaptable to allow for adjustments as the project progresses.
- An understanding of the commercial realities by the community and transparency on both sides are essential for a strong, trusting partnership to develop.
- Expectations need to be realistic. Communities need to understand revenue, costs, and profit. They need to be aware of the operating costs and both partners need to understand the others respective costs and the amount of profit that will remain for sharing.
- Establishing a committee that involves local people, private operators, government agencies, and NGOs can help to ensure good communication, better understanding, smooth operation of agreement, and minimize potential conflicts.

Fair Trade in Tourism

- Basic principles of fair trade should be maintained throughout the partnership:
  - The people who live in the places that tourists visit should be consulted and in control of the process.
  - Tourism operation and development should create partnerships between government, investors, and communities based on mutual respect and equitable sharing of the costs and benefits of investment.
  - All parties must commit to ethical trading practices as part of corporate social and environmental responsibility and accountability.
  - Establishing a regional network of Fair Trade in Tourism would assist in delivering community-based tourism.

Financing CBT

- Successful projects tend to be those where local partners have to invest something in the project themselves, though it could be non-monetary, rather than relying on donor funding.
- Private business and the national tourist authority should also be willing to invest into the project as they will profit from developing a unique product.
- Appropriate forms of support from donors could include a soft loan/microcredit.
- A well-considered business plan should be developed.

---

9 Authors: Nicole Häusler & Wolfgang Strasdas; Addendum to “The Ecotourism Training Manual for Protected Area Managers”
ANNEX 6 SOURCES FOR SOCIAL MEDIA ANALYSIS

FRANCE

Social medias and forums:
- Trip Advisors (site and forum) http://www.tripadvisor.fr/
- Routard (forum) http://www.routard.com/
- Twitter #Mongolie

Travel Blogs:
http://www.leblogdesarah.com/
http://www.kilometres-et-megapixels.com/
http://audetourdunchemin.uniterre.com/
http://www.madame-oreille.com/

GERMANY

Social medias and forums:
- Trip Advisors (site and forum) http://www.tripadvisor.de
- Mongolie Forum (forum) http://www.mongolei-forum.info/
- Welt reise Forum (forum) http://www.mongolei-forum.info/

Travel Blogs:
http://www.justtravelous.com/
http://thrones.rtwblog.de/

JAPAN

Machida no kuma (2011) http://tabisuke.arukikata.co.jp/album/14449/

RUSSIA

LiveJournal is a social networking service where Internet users keep their blogs and publish posts on various topics including tourism and traveling. According to Rambler Top100, it ranked the 5th among 160401 websites of Runet. The 6th position is held by Drom.ru which is the most popular automobile portal among Russian Internet users. It has almost 500 thousand users and 1.2 million topics are discussed on its forum which also includes the reviews about traveling.

Vinskiy Forum (www.forum.awd.ru) is a social network of individual travelers where users can share their travel experiences in the form of reviews and photo reports. It has 28,000 users and 160,000 topics. One of its sections is devoted to traveling in Mongolia with 74 topics being discussed. According to Rambler Top100, Vinskiy Forum is ranked the 5th among 7473 Russian websites on travel and tourism topics.

My Planet Club (www.moya-planeta.ru/) is a website of the Russia’s main TV channel about travel, history and people, it is ranked the 1st among the Russian educational TV channels. It also publishes reports by independent Russian travelers. According to Rambler Top100, it ranked 18th in terms of popularity amongst Russian websites specializing in travel and tourism.

Travel.ru is one of the most popular Internet resources about tourism on Runet. Apart from daily updates of the travel-related information, it contains sections such as Photo Reports, Tourists’ Reviews and Personal Experience where visitors can publish their reviews and leave comments. Its forum has 25,500 registered users and more than 26,000 topics. It is ranked the 18th most popular among Russian travel and tourism websites.

CBI | Market Intelligence Tailored Study Cultural tourism to Mongolia 2015 | 49
Otzyv.ru is an online platform where Internet users can leave their reviews regarding destinations and tourism services provided to them during their travel. It is ranked the 19th among tourism related websites of Runet. Mongol.su is a website designed to provide information about traveling in Mongolia. According to its statistics, there are over 3000 registered users and over 1000 topics, of which 110 are specifically devoted to travel reports and reviews.

Website traffic for October 2014

<table>
<thead>
<tr>
<th>№</th>
<th>Website</th>
<th>Popularity index</th>
<th>Visitors</th>
<th>Page views</th>
<th>Home page views</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>LiveJournal.com</td>
<td>105 242</td>
<td>44 443 302</td>
<td>508 954 563</td>
<td>12 472 232</td>
</tr>
<tr>
<td>2</td>
<td>Drom.ru – automobile portal</td>
<td>104 798</td>
<td>17 110 520</td>
<td>720 984 354</td>
<td>22 711 718</td>
</tr>
<tr>
<td>3</td>
<td>Vinskiy Forum</td>
<td>83 347</td>
<td>2 062 684</td>
<td>17 777 672</td>
<td>705 226</td>
</tr>
<tr>
<td>4</td>
<td>My Planet Club</td>
<td>72 482</td>
<td>1 164 288</td>
<td>2 666 187</td>
<td>102 102</td>
</tr>
<tr>
<td>5</td>
<td>Travel.ru – tourism portal</td>
<td>72 423</td>
<td>1 352 781</td>
<td>3 157 045</td>
<td>100 105</td>
</tr>
<tr>
<td>6</td>
<td>Otzyv.ru – tourists’ reviews</td>
<td>72 102</td>
<td>108 959</td>
<td>565 517</td>
<td>533 580</td>
</tr>
<tr>
<td>7</td>
<td>Mongol.su – travel in Mongolia</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

Source: Rambler Top100

USA AND UK

TripAdvisor site and forum [www.tripadvisor.com](http://www.tripadvisor.com)
Lonely Planet and Thorn Tree forum for Mongolia and North East Asia [www.lonelyplanet.com/thorntree](http://www.lonelyplanet.com/thorntree)
Tripologist [www.tripologist.com](http://www.tripologist.com)
TravBuddy [www.travbuddy.com/forums](http://www.travbuddy.com/forums)
Virtual Tourist [www.virtualtourist.com](http://www.virtualtourist.com)
This survey was compiled for CBI by Acorn Tourism Consulting Ltd

Disclaimer CBI market information tools: http://www.cbi.eu/disclaimer

June 2015