This Handbook offers an up-to-date and comprehensive overview of core themes and concepts in community-based tourism management. Providing interdisciplinary insights from leading international scholars, this is the first book to critically examine the current status of community-based tourism.

Organised into five parts, the Handbook provides cutting-edge perspectives on issues such as Indigenous communities, tourism and the environment, sustainability, and the impact of digital communities. Part 1 introduces core concepts and methodologies, and distinguishes community products from other tourism and hospitality goods. Part 2 explores communities’ attitudes towards tourism development and their engagement with and ownership of the process. It also delves into the role of community-based tourism, under the influence of governmental policies, in the economic and social development of a region. In Part 3 various management, marketing, and branding initiatives are identified as a means of expanding the tourism business. Part 4 examines the negative impacts of mass tourism and its threats to culture, tradition, identity, the built environment, and natural heritage. In the final and fifth part, future challenges and opportunities for community-based tourism initiatives are considered, and research-based sustainable solutions are proposed. Overall, the book considers engaging local populations in tourism development as a way of building stronger and more resilient communities.

This Handbook fills a void in the current research and thus will appeal to scholars, students, and practitioners interested in tourism management, tourism geography, business studies, development policy and practice, regional development, conservation, and sustainability.

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Dedicated to my Parents; my better half Anna; and my little daughter, Aadhaya who has just arrived in our life and made us complete.
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I have learned that ‘academic research’ cannot be accomplished alone. Thanks to all of you who made this Handbook come true.

Dr Sandeep Kumar Walia
Like any other business, tourism has to manage its supply side, which is largely represented by communities. Tourism is an international economic segment dominated by service organizations that supply products and services to patrons. The contribution of the tourism and travel sector to strengthening and empowering communities as pillars of sustainable development has been the subject of debate and research for many decades now. Tourism is a great social tool that reduces inequalities and helps communities progress. Researchers and practitioners have long since advocated for the ability of tourism to fully empower people. The more positive view is that engaging local populations in tourism development will help build stronger and more resilient communities. Within the peripheries of tourism, sustainable tourism has been identified as a one of a kind model that has very low negative impacts on society and the environment. In other words, sustainable tourism has been acknowledged as being responsible for the development of tourism, particularly in developing countries.

To this end, ‘Community-based tourism’ (CBT) has emerged as a buzzword in the arena of academic research and in the global tourism industry over the last few decades. It seeks to support local people in administering tourism development and attaining aspirations associated with improving their well-being at all levels, including social, economic, and environmental. This concept has emerged as a successful practice for promoting the development of sustainable tourism, which, in return, results in significant growth in all aspects of the community. CBT protects the prolonged existence of the tourism product and encourages the cultural as well as the environmental conservation of the area.

CBT fosters understanding between people, creating employment opportunities and bringing about socio-economic benefits for the community, particularly in interior and remote areas; striving towards balanced and sustainable development; and preserving, enriching, and promoting a region’s cultural heritage. It can preserve and help in the protection of natural resources and environments in order to achieve sustainable development in the community itself. Thus, CBT is not only about the association between tourism organizations and the community for delivering benefits but also about extending community support to small hospitality endeavours, which extend further support for community development and cooperative well-being.

Beyond this, CBT generates employment, reflecting the multiple effects of tourism services and the low level of exploitation of tourism potential. It seeks to expand foreign tourist
arrivals and facilitate domestic tourism in a manner that is sustainable by ensuring that possible adverse effects, such as cultural pollution and degradation of the environment, are minimized, and the benefits of host-guest interaction are maximized.

As a service sector, tourism helps people develop a variety of skills; with its cross-cutting impact on various industries, like agriculture, construction, and handicrafts, it creates millions of business and employment opportunities. CBT can help develop positive change in communities around the world by protecting the environment and promoting gender empowerment as it has the capacity to lift people from poverty. There can be no real development if the tourism damages the values and culture of the host communities or if the socio-economic benefits created by tourism do not trickle down to the community level.

With the growth of internet and mobile technology, the reach of tourism products can be maximized, and tourists can be provided with relevant information about the existence of such initiatives in the tourism business. On the one hand, due to technological advancements, communities can showcase their initiatives directly and have a wider reach for promoting their intangible and cultural heritage, and their uniqueness. On the other hand, the decision-making process to visit and experience such initiatives is assisted by the information about other tourists' experiences, which can be readily available online as reviews or on social media.

To reflect upon the various aspects of CBT, the present Handbook is drafted upon issues concerning marketing to community-based tourism initiatives through different methods which are directly and indirectly influencing the overall tourism community and of course tourism development. The contributions cover the themes of conceptual overviews of CBT; its inception, growth, and development over the years; CBT initiatives and community engagement; marketing and branding strategies for CBT and its initiatives; entrepreneurial opportunities and the role of community initiatives in economic development; and issues pertaining to opportunities and challenges in the future for CBT initiatives. In order to have the most up-to-date inputs, contributors were invited from diverse subject areas, in which they were working on analogous fields of study. Hence, in the present Handbook, an effort was made to update the existing body of knowledge on CBT management by consolidating scattered know-how in one place.

This Handbook introduces CBT and its role in tourism development in the regional, local, and international arenas. Divided into five parts, it highlights critical dimensions and mechanisms, profiles, and key lessons through various destination cases and supporting practices for CBT. The five parts cover theoretical as well as practical aspects from communities that have successfully harnessed tourism as a source for sustained, long-term development and that have attained market improvement in spite of obstacles. This Handbook provides an exhaustive source of information and seeks to inspire readers, including academicians, practitioners, researchers, and students at the graduate and post-graduate levels, equipping them with both theoretical and practical knowledge on the present scenarios of CBT, analyzed at various destinations and at the situational level, thereby supporting the existing body of knowledge about CBT, not only in tourism and hospitality but in other allied disciplines as well.

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The handbook opens with Part 1, which introduces the reader to community-based tourism (CBT) and its initiatives. This part contains nine chapters and illustrates the conceptual, methodological and applied base of community-based tourism and its associated initiatives from tourism perspectives. It further elaborates on the different conceptual models and theoretical backgrounds of community-based tourism, and differentiates community products from other tourism and hospitality goods/products. The behavioural intentions and their implications are also dealt with, along with the ethical and cross-cultural issues of community-based tourism. This part also explains the changing dimensions of community-based tourism and its relationship with policy, the planning of tourism in communities and community well-being. Various authors/researchers contribute papers that focus not only on drafting the role of the community but also on highlighting the numerous concepts and trends associated with it. The objective of this part is to provide readers with insights into the issues and concerns of communities which are involved in tourism, either indirectly or directly, thereby providing or analyzing various theories, philosophies, policies and frameworks.

The first chapter, titled “Community-Based Tourism: A Preamble from Literature” written by Dr Sandeep Kumar Walia, tries to lay down the foundation of community-based tourism. It focusses on various associated concepts of local communities in tourism and their role in tourism development. The chapter begins with an intense review of various approaches and theories as applied by researchers to investigate the topic. Despite the fact that the outcomes of available studies about residents and their role in the development of tourism have mostly been convincing, further research into the community perspective with respect to the travel industry’s growth under various settings and types of development is suggested.

Considering the complex systems and insights of planning theory in tourism planning and local community development, Chapter 2, entitled “Harmonic Tourism Methodology: A Proposal for Tourism Planning in Rural Communities,” written by Yanelli Daniela Palmas Castrejón, Rocío del Carmen Serrano-Barquín and Alberto Amore, presents and applies the Harmonic Tourism Methodology as an alternative to community-based and community-led tourism planning, thus offering a viable approach to community-based tourism that may further help in generating more resilient and sustainable tourism development.

Similarly, Chapter 3, “Overview of Community-Based Tourism: From History to Evaluation Framework,” by Yusuke Ishihara serves as a source to revive and review the concept of
Community-Based Tourism, along with critical issues, such as its history, definition, central idea, implementation and the evaluative framework attached to it. In view of current trends in the fields of tourism and international development, the author has also discussed and provided a knowledge-based platform for broader perspectives of CBT.

Moving ahead to other aspects, in Chapter 4, another two authors, Aruditya Jasrotia and Amit Gangotia, have drafted and analyzed factors that act as facilitators and inhibitors to community-based tourism. The authors, in their study “Understanding the Facilitators and Inhibitors of Community-Based Tourism: A Case Study of Dharamshala,” take a dimensional look at the concept, supporting the theory that community-based tourism can have a vivacious role in encouraging community participation in the unprejudiced development of the local community. The study integrates the concepts of poverty mitigation, CBT and tourism development to explain the successful establishment of community-based tourism in Dharamshala, which can further be taken up by authorities in other destinations to follow up the necessary practices for sustained tourism development.

However any research cannot be said to be completed without the analyzing the of previous literature and researches conducted in the targeted field, to which the Chapter 5 by Luciana Aparecida Barbieri da Rosa et al. (“A Longitudinal Study of Articles Published on Community-Based Tourism and Sustainable Development: Reflections and their Applicabilities in the Scope and on Web of Science Databases for the Period from 1998 to 2018”) is endorsed with the literature and the characteristics of publications related to the theme, community-based tourism and sustainable development in the Scopus and Web of Science database from 1998 to 2018, at the theoretical and empirical debates.

CBT has gained prominence over the last 20 years because it is considered one pathway to sustainable tourism development. It assumes that community participation in tourism is desirable; empowering community members to engage in the development and management of this kind of tourism fosters sustainability both in cultural and in economic terms. In contrast to this, Chapter 7, written by Carla Guerrón Montero, Laura Santos and Daniele Santos, and entitled “Ethno-Ecological Community-Based Tourism from Within: Quilombo Tourism and the Quest for Sustainability in Brazil,” proposes that the model developed at Campinho, defined as ethno-ecological community-based tourism by quilombola members, provides an exemplified outlook on CBT.

Further considering the societal aspects of tourism, Verónica Mora-Jácome, Christian Viñán-Merecí and Alex-Paúl Ludeña-Reyes, in their chapter “Local Culture, Society and Resources as Products for Tourism Development at ‘El Cisne’ Parish,” analyze the current situation of the “El Cisne” parish, based on local culture, society and resources as well as the type of tourism that can be developed here, looking at the consequences of tourism on the basis of sustainable development by conducting the bibliographic review with respect to state of tourism the criteria for integration and sustainability was analyzed that can be assumed by the host communities.

Similarly, Sónia Moreira Cabeça’s research in Chapter 9, “Community-Based Tourism, a Means Toward Cultural Heritage Preservation: The Case Of Cante Alentejano (Alentejo, Portugal),” explains intangible cultural heritage and safeguarding requirements through community involvement and, from the tourism point of view, of community-based tourism. Lastly, Octavio Barrientos, Glen Croy, Jagjit Plahe and Peter Holland’s chapter “Social Movements and Community-Based Tourism: The Case of Pichilemu” profiles the targeted area in comparison to the theorised understanding of social movements and over-tourism, and demonstrates the emergence of the CBT enterprise.

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1
COMMUNITY-BASED TOURISM
A preamble from literature

Sandeep Kumar Walia

1.1 Introduction

The tourism industry is drafting out a role for itself as a major part of economic development in the world, particularly to the developing nations. Organizers and planners who have considered the economy solely on the basis of “brick and mortar” stores have begun to consider the travel industry a sensible framework with conventional ventures. At the same time, residents in various regions are encountering the consequences of the travel industry establishing itself in their home regions. To attain support for travel industry ventures and activities, various organizers and planners have attempted to understand how the general public reacts to the influence that tourism can have on development. It can bloom when the local population of a community is inclined towards it and when its members have positive perceptions towards tourists and the development of this industry. This positivism in the community also depends on whether its members see themselves taking part in the development process of tourism. This is where the concept of community-based tourism (CBT) comes in: where tourism activities are owned and managed by the community, and all the benefits are delivered to and focussed on them (Goodwin & Santilli, 2009). When a particular destination is introduced, the life quality of the local community goes through some transformations in attitudes towards tourism. CBT is actually a multi-ethnic framework used to grow economies, both urban and rural, thus providing communities with prospects for enhanced livelihood (Anuar & Sood, 2017).

There is wide accord in the literature concerning the need to understand the host community’s disposition toward travel industry development (Gursoy & Rutherford, 2004; Chen & Chen, 2010; Choi & Murray, 2010; Wang & Chen, 2015). Communities, especially in developing nations, are considered generally unacquainted with the costs and complexity associated with rapid tourism development in their areas (Rosenow & Pulsipher, 1979). While this is a prominent part of the literature (for instance Oviedo-Garcia et al., 2008; Chen & Chen, 2010; Nunkoo & Gursoy, 2012; Woosnam, 2012; Vargas-Sánchez et al., 2015; Wang & Chen, 2015; Almeida-Garcia et al., 2016), there is still some uncertainty around this matter; more analysis is needed, in more diverse places, particularly with respect to local communities and using new research methodologies (Gursoy & Rutherford, 2004; Vargas-Sánchez et al., 2011; Nunkoo et al., 2013; Sharpley, 2014).
1.2 Finding space for community in tourism: community-based tourism

Tourism is always viewed as a source of financial development by the local populations of a community as it incorporates different components that enhance their personal satisfaction as well as the development process of natural and cultural resources (Kandampully, 2000; Andercck et al., 2005). Despite these benefits, it has also led to negative consequences on local populations’ personal satisfaction, e.g., a rising cost of basic items, wrongdoings, changes in local peoples’ ways of life, transportation and parking issues, etc. (Brunt & Courtney, 1999; Brunt & Hambly, 1999; Tosun, 2002). Because of the outgoing influence of tourism, destinations representations have significant influences on the local community (Salazar, 2012).

For organizers and planners who have little knowledge of the tourism industry, other than being travellers themselves, the desire to retain information about this industry and host communities’ dispositions towards the tourism business can signify fear or nervousness. Regardless of the interest, only a few studies on organizing and developing in tourism have made their way into renowned journals (Inskeep, 1988; Loannides, 1995; Marcouiller, 1995, 1997; Harrill & Potts, 2003), and books on tourism business administration are rare (Gunn, 1997; Bosselman et al., 1999; Judd & Fainstein, 1999; Hall, 2003).

1.2.1 Community as a support system for tourism development

Tourism development is perceived by a local community as beneficial and as creating favourable circumstances that increase the chances of effectiveness in various ways, including via economic benefits, improving the quality of life of the local population, socio-cultural benefits, and improvements in tourist infrastructure and the host-tourist relationship (Niezgoda, 2011). The findings of some research studies (Hanafiah et al., 2013; Wang & Chen, 2015) indicate that most locals have positive feelings towards tourism development and are in support of it.

Contact between local people and visitors is a focal point for a positive experience in tourism (Luo et al., 2015), and it also emphatically influences satisfaction among travellers and residents when it comes to tourism (Pizam & Fleischer, 2002; Andercck et al., 2005; Eusébio & Carneiro, 2012; Kastenholz et al., 2013; Kastenholz et al., 2018). Visitor contact is also an unpredictable concept that has been conceptualized in different ways. Reisinger and Turner (2008) describe social contact in the travel industry as “the individual experience that happens between a tourist and a host” (p. 37).

Contact among tourists and residents is a continuous area of research with a nonappearance of both theoretical principle and practical examination (Eusébio & Carneiro, 2012; Eusébio et al., 2016). The repetition of contact in different settings and the satisfaction with this contact are the generally used measures (for instance Turner & Reisinger, 2003; Eusébio & Carneiro, 2012; Kastenholz et al., 2013; Eusébio et al., 2016). In most destinations, the social contact between hosts and guests is short, temporary and unequal to the extent reflected for both the characters (De Kadt, 1979; Turner & Reisinger, 2003; Eusébio & Carneiro, 2012; Kastenholz et al., 2015). In any case, if circumstances for interaction emerge, contact among tourists and inhabitants may occur (Eusébio & Carneiro, 2012), and, if these interactions are satisfying, apparently ethnic bias and generalizations will decrease, social improvements will be enhanced and pressure between the tourists and hosts while they learn more about each other will be reduced (Turner & Reisinger, 2003; Luo et al., 2015).

According to Akis et al. (1996) and Weaver and Lawton (2001) well-behaved locals and occupants who are frequently in contact with tourists have progressively more positive
attitudes towards tourism development. The analysis carried out by Weaver and Lawton (2001) found that communities that have thorough interactions with visitors seem to articulate more affirmative attitudes towards tourists and, of course, tourism development. Andereck et al. (2005) analyzed whether residents who have more contact with travellers see larger amounts of positive tourism influences and inferred that residents who have moderate contact with tourists see increasingly distinct outcomes (for instance in community life and in the economy) and exhibit no differentiation concerning the negative impacts of tourism (for instance in the community and in regard to ecological issues).

The larger proportion of research focuses on understanding host-resident attitudes toward the development of tourism in developed countries (for instance Dyer et al., 2007; Gu & Ryan, 2008; Kaltenborn et al., 2008; Oviedo-Garcia et al., 2008; Byrd et al., 2009; Nunkoo & Ramkissoon, 2012; Látková & Vogt, 2012; Woosnam, 2012; Sharpley, 2014). However, past research studies present a nonappearance of acceptance as far as the components affecting the host community’s attitudes toward tourism development are concerned (Chen & Chen, 2010). Additionally, there are numerous studies examining the undeviating and indirect influences of destination association and the guest-host relationship on inhabitant attitudes toward tourism development.

The travel industry is considered by development authorities to be among the most crucial financial activities that support the economic advancement of nations, especially developing ones. A number of researchers have conducted studies in such nations (for instance Akis et al., 1996; Sirivongs & Tsuchiya, 2012; Simão & Mósso, 2013; Ribeiro et al., 2013; Sharpley, 2014; Sánchez et al., 2016) and have done so even more unequivocally in island tourism destinations. Accordingly, these destinations customarily stand up to monetary and social obstructions that restrain their organized development, and the populations are frequently dispensed from the tourism industry’s basic process of management and planning (Dyer et al., 2007). Likewise, Wang and Chen (2015) note, “In developing visitor destinations, the tendency and interests of travelers are normally placed before the people who live and work in these regions” (p. 17). This adds to the requirement of community-based tourism research and its role in the development of nations, which may highlight widely different consequences in developing nations from those seen in developed ones (Gursoy & Rutherford, 2004; Rasoolimanesh et al., 2017).

1.3 Community: a dividend to social exchange practices

While attempting to address the host community’s issues and elucidate their viewpoint and role in supporting the development of tourism, researchers have proposed numerous theories. Although many have been put forward, Social Exchange Theory has been the most widely used and discussed by researchers (Byrd et al., 2009). Ap (1992, p. 668) defines this as “a general sociological theory attributed in understanding the trading of assets among individuals and groups in a trade situation.” Researchers consider Social Exchange Theory to have made the most fundamental theoretical contribution to the understanding of local residents’ attitudes towards tourism development (Fredline & Faulkner, 2000). Regardless of the wide utilization of this theory by researchers, fundamental constructs such as power and trust, which are critical to the trade relationship between residents of a tourist destination and the travel industry, have been considered and examined less often. While a couple of studies have looked at the construct of power in explaining residents’ attitudes toward tourism development (for instance Madrigal, 1993; Kayat, 2002a), aside from some examinations – in Nunkoo and Ramkissoon (2011); Nunkoo et al. (2012); Nunkoo and
Sandeep Kumar Walia

Table 1.1 Timeline of studies in linkage with resident and tourism development

<table>
<thead>
<tr>
<th>Authors and year of publication</th>
<th>Focus areas</th>
</tr>
</thead>
<tbody>
<tr>
<td>McCool and Martin (1994)</td>
<td>Community attachment; development of tourism; attitude; length of being a domicile</td>
</tr>
<tr>
<td>Robert Madrigal (1995)</td>
<td>Resident’s perception; tourism development; role of government</td>
</tr>
<tr>
<td>Lindberg and Johnson (1997)</td>
<td>Demographic variables; economic gain; minimal disruption of daily local facilities; environment; tourist interaction; community/culture disposition; decisions process; community attitudes</td>
</tr>
<tr>
<td>Yoon et al. (2001)</td>
<td>Tourism impact (economic, social, cultural and environmental); support for tourism development</td>
</tr>
<tr>
<td>Gursoy et al. (2002)</td>
<td>Community attachment; eco-centric attitude; resources utilization by residents; perceived benefits; perceived costs; support for tourism</td>
</tr>
<tr>
<td>Ko and Stewart (2002)</td>
<td>Perceived tourism benefits, impacts of tourism; satisfaction; support for tourism development by local community</td>
</tr>
<tr>
<td>Jurowski and Gursoy (2004);</td>
<td>Community concern; eco-centric attitude; utilization of the tourism resources by the residents; state of the local economy; perceived benefits; perceived costs; support for tourism development</td>
</tr>
<tr>
<td>Gursoy and Rutherford (2004)</td>
<td></td>
</tr>
<tr>
<td>Gursoy and Kendall (2006)</td>
<td>Resource utilization by Residents; State of the Local Economy; Perceived benefits of tourism; Perceived Social and Socio-economic Costs; Attitudes towards Tourism Development</td>
</tr>
<tr>
<td>Dyer et al. (2007)</td>
<td>Threat; Social Exchange; Contact; Attitudes; Stereotypes</td>
</tr>
<tr>
<td>Gursoy et al. (2002)</td>
<td>Destination image among residents; Support for Tourism</td>
</tr>
<tr>
<td>Ward and Berno (2011)</td>
<td>Development; Tourism Impacts; Sustainable Development</td>
</tr>
<tr>
<td>Styliadis et al. (2014)</td>
<td>Power; Trust; Guest Host Interactions</td>
</tr>
<tr>
<td>Nunkoo and So (2016); and Eusébio et al. (2018)</td>
<td>Host Tourist Interactions; Place Attachment; Residents’ Perceptions of Tourism Impacts; Residents’ Attitudes</td>
</tr>
</tbody>
</table>

Source: Author’s own analysis.

Smith (2013), etc. – the construct of trust has stayed mostly uninvestigated in tourism literature. Nunkoo and Ramkissoon (2011) contend that “The study of power and trust that incorporate the Social Exchange Theory eventually can’t be sufficiently composed in a solitary framework in research on host community residents’ attitudes toward tourism” (p. 966).

Using the idea of power as a segment of Social Exchange Theory, a few researchers have studied residents’ attitudes toward tourism development (Table 1.1). Madrigal’s (1993) study on two Arizona community groups demonstrates that occupants’ opinions of the prospect of tourism were strongly related to their individual control over tourism development. Contrarily, some opinions were related to the control of businesses over tourism. Kayat’s (1992b) study on the island of Langkawi, Malaysia, found that residents had positive attitudes and were strong supporters of the future development of tourism. Nunkoo and Ramkissoon’s (2011) study on Grand-Baie, Mauritius, similarly recommends that residents were emphatically disposed toward tourism as compared to less disposed ones.

Nunkoo and Ramkissoon (2011) affirm that low trust in tourism institutions may reduce residents’ valuation of and appreciation for tourism development in any particular region. Using the Social Exchange Theory as the theoretical base of their investigation of the residents of Grand-Baie, Mauritius, they found that residents with a lot of trust in tourism planning and decision-making organizations see tourism development positively, while those with lower levels of trust are less predisposed towards the tourism business. The outcomes of
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their examination emphasize the necessity of trust in the social exchange between residents and tourism institutions.

1.4 Conclusion

Although the tourism business has variously benefitted local communities, it has also led to some negative social, cultural and environmental impacts. It has been less welcomed due to its ability to disrupt and harm local systems, undermine social principles, spoil social structures and strip systems of their uniqueness. There are a number of studies investigating community association and host-guest contact in tourism development. Despite of the way in which the eventual outcomes of existing literature about power and residents’ attitudes toward tourism development have by and large been inducing, further studies concerning this under varied settings and structures need to be carried out. Consequently, the construct of trust is a promising one and needs further assessment and research by scholars in this field. The majority of research in this area has been undertaken in developed nations; hence, researchers and scholars need to further study the views of developing nations toward tourism. Moreover, there are a predetermined number of studies investigating communities and their roles in tourism, their attachment with the place, the role of interaction between them and tourists, and their role in tourism development. Tourism can never be considered just from the tourists’ perspective as the role of the community, as a host, a source or a service provider, merits significant discussion. Despite the fact that the outcomes of the available studies about residents and their role in the development of tourism have, further research into communities’ power with respect to travel industry development under various settings and types of development need to be carried out.

The involvement of the community in various forms and their participation in CBT, its assessment and planning processes, situations and reactions in terms of attitude, participation etc. requires the potential for the members of the local community to enhance their skills, networks, and buoyancy that further enhance tourism development and its benefits. Accordingly, this volume compiles numerous ideas and studies in tourism development that have been conducted by researchers and scholars. The majority of the studies reviewed in this book use a theoretical approach; however, the authors also apply theories and concepts from other fields, such as sociology and psychology, to understand and examine local communities’ roles in tourism development in various destinations and in various forms and practices.

References


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2
HARMONIC TOURISM METHODOLOGY

A proposal for tourism planning in rural communities

Yanelli Daniela Palmas Castrejón, Alberto Amore and Rocío del Carmen Serrano-Barquín

2.1 Introduction

Tourism nowadays represents one of the most important and fastest-growing economic sectors worldwide (UNWTO, 2019a), with developing countries showing a significant upward trend both in terms of travel and revenues (UNWTO, 2011; WTTC, 2018; Yeoman, 2012). Estimates from the United Nations World Tourism Organization (UNWTO) for the year 2018 suggested that tourism accounted for nearly USD$145 trillion in revenues (UNWTO, 2019a), with around 10% of jobs worldwide being connected to travel and tourism (UNWTO, 2019b). In the coming years, the direct economic contribution of tourism to the world’s GDP is expected to grow around 3.9% annually (WTTC, 2018 2019a, 2019b). Overall, tourism is a globalizing phenomenon that encompasses urban as well as rural communities and provides a wide range of skilled and unskilled job opportunities. The geographical reach and the economic diversification of tourism relies heavily upon the use of and access to natural and socio-cultural resources. The latter need to be efficiently managed in order to enhance benefits whilst mitigating negative impacts (Hall & Lew, 2009). Ideally, well-planned tourism development projects should encompass income generation, job creation, regional development, urban revitalization, resource management, cultural identity and protection of endangered flora and fauna through a holistic approach (CNET, 2019). However, the complexity of tourism planning comes with the identification of shortcomings, including the negative externalities of tourism on the natural environment (Acerenza, 2006; Jimenez, 1986) and the socio-cultural impacts it has on a host community (Monterrubio Cordero, 2011, 2018).

More recently, global institutions like the World Bank, the United Nations (UN), the United Nations Educational Scientific and Cultural Organization (UNESCO) and the UNWTO have promoted tourism as a flywheel for poverty reduction in remote and least-developed contexts (UN, 2017; UNESCO, 2010; UNWTO, 2017; World Bank, 2019). Tourism development well suits the Sustainable Development Goals (SDGs) and Agenda 2030. According to the UNWTO (2017, p. 27), “tourism is a key sector for achieving the SDGs and can be a powerful vehicle to promote and reach the milestones of the ambitious agenda”. In particular, sound tourism development policies in rural areas and communities
can foster “inclusive and sustainable economic growth” (SDG #8) (UN, 2019a, n.p.), reduce poverty and inequalities (SDGs #1 and #10) and promote climate action (SDG #13) (UN, 2019b). To achieve these goals, tourism planners should reconsider the “potential for partnerships that recognise local development strategies, develop community capabilities and build sustainable outcomes based on a locally led agenda” (Hughes & Scheyvens, 2018, p. 532). The vision for 2030 is to “implement policies to promote sustainable tourism that creates jobs and promotes local culture and products” (UNWTO, 2017, p. 10).

The inclusion of socio-ecological features within the framework of the SDGs can have important positive impacts for sound tourism planning. In particular, it can help support communities in vulnerable contexts, enhance their proactive participation in knowledge creation and reduce their exposure to natural hazards and climate change in the Anthropocene (Hall, Baird, James & Ram, 2016; Saarinen, 2019). Risk reduction of natural hazards and community-driven sustainable development are key to the Sendai Framework (UNISDR, 2015). The framework stresses the role national and local authorities should play in defining and implementing integrated actions to reduce vulnerability and, in turn, enhance resilience (UNISDR, 2015). Tourism easily fits the purpose of resilience building, particularly in remote rural regions prone to short- and long-term environmental vulnerabilities (Lew, 2014). Under such an emerging paradigm, market-driven tourism growth strategies targeting traditional forms of mass tourism are put into question and replaced with ‘alternative’ modes of development that enable socially and economically marginalized local stakeholders to be at the forefront of community-driven resilient practices of natural and cultural resource management (Ruiz-Ballesteros, 2011). However, many of these initiatives are stand-alone and short-lived cases at the micro-level (Hall, Dayal, et al., 2016), with the majority of tourism development projects conceiving development from a Western-minded perspective with little-to-no acknowledgment of Indigenous communities (Moscardo, 2011a, 2011b; Mowforth & Munt, 2015).

In practice, much remains to be done. To date, most tourism development projects do not consider the complexity of societies and the interrelations between ecological, political and socio-cultural dimensions. In this context, this chapter introduces and applies the Harmonic Tourism Methodology (HTM) (Palmas, Serrano-Barquín & Gutierrez, 2017) as a way to include the aforementioned dimensions in the study and to implement the community-driven and resilient practices of holistic tourism planning. The underpinnings of this methodology are that tourism destinations are complex systems consisting of interdependent and inter-definable elements (Serrano-Barquín, 2008) and that the correlation between vernacular and rational knowledge enables inclusive and proactive modes of destination governance and decision-making among relevant tourism stakeholders and the local community.

This chapter consists of three sections. The first provides the theoretical and conceptual foundations of the HTM, with an emphasis on the notions of vulnerability and resilience within the tourism planning discourse. The second section introduces the HTM and its features, with a focus on the findings from rural contexts in Mexico and Colombia where it was applied. Finally, the conclusions section provides a summary of the content addressed in the chapter and outlines a range of key recommendations for practitioners to consider in relation to the HTM in resilient and inclusive destination planning.

2.2 Vulnerability and resilience in tourism planning: a complex systems approach

Complexity is the essence that allows science to push aside simplistic, reductionist and mechanistic thinking, and enhance knowledge creation in a dialectic, recursive and hologrammatic
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way (Morin, 2005). Tourism as a research subject is rather complex to be streamlined under predefined disciplinary boundaries, with scholars advocating for transdisciplinary and post-disciplinary forms of knowledge creation (Coles, Hall & Duval, 2016) that acknowledge the complexities of tourism and its multiple overlapping perspectives. Complex Systems Theory conceives planning as “self-organizing, with diverse agents, many interactions and non-linear dynamics” (Innes & Booher, 2018, p. 34) that ultimately culminate in adaptive practices of decision-making “that reflect the diversity of the environment” (Innes & Booher, 2018, p. 34). The Theory of Complex Systems has been applied in the field of tourism (Farrell & Twining-Ward, 2005; Mill & Morrison, 1985; Rivas, 2009; Serrano-Barquín, 2008; Serrano-Barquín, Ramírez, Campos & Melgarejo, 2010) and challenges the notion of cause-effect linear systems that dominate mainstream tourism policy-making and destination management (Clarke & Godfrey, 2002; Ejarque, 2003; Mason, 2015). Arguably, the inclusion of Complex Systems Theory can be defined as a problem-centred knowledge (or Mode 2) in the tourism knowledge system (Tribe, 2004; Tribe & Liburd, 2016) as it stretches beyond the domain of business and management studies.

In ecology and environmental studies, Complex Systems Theory can help explain the impact of triggering events and environmental jolts (Linnenluecke & Griffiths, 2013) in relation to socio-environmental systems. In particular, the alterations of one specific trigger can propagate in multiple ways and forms that, particularly in context of high vulnerability, can lead to episodes of drastic adaptation and reorganization at the landscape, network, actor and personal levels (García, 2006; Geels, 2005; Gössling, Scott, Hall, Ceron, & Dubois, 2012). According to García (2006), Complex Systems Theory enables the appraisal of the relationship between nature and anthropic activities through a multiscalar perspective (local to global) that considers embedded historical and structural constraints and their relevance in the framing of conceptual, epistemological and ontological realities. Table 2.1 provides an overview of the items and concepts central to complex system thinking in relation to community-based development. The shift towards reflexive thinking and research positionality addressed in the table underpins the third and fourth stage of qualitative tourism research (Riley & Love, 2000).

Alongside Complex Systems Theory, two further insights rooted in ecology have recently been introduced into tourism policy and planning. The first is the notion of vulnerability, here defined as “the susceptibility of a system to disturbances determined by exposure to perturbations, sensitivity to perturbations and the capacity to adapt” (Nelson, Adger & Brown, 2007, p. 11). Vulnerability represents an important paradigm in the analysis of human-environment systems within the framework of sustainability and global environmental change science (Turner et al., 2003). According to Berkes (2007), the study of vulnerability is necessary for three reasons. First, it allows for a holistic approach in the assessment of risks that can undermine natural and social environments. Second, it helps explain the ability of systems to face, absorb and adapt to risks. Third, it allows a glimpse into the future to explore policy options as well as how to cope with uncertainty and change. In a similar fashion, studies on the vulnerability of tourism destinations predominantly focus on contexts recently affected by natural disasters (e.g., Calgaro, Lloyd & Dominey-Howes, 2014) and their exposure to short- and long-term triggers like climate change, earthquakes and weather-related hazards. Research on destination vulnerability embodies notions from the Complex Systems Theory (Calgaro, 2010; Njoroge, 2014; Orchiston, 2012), yet it is rather limited as Calgaro (2010, p. 6) observes:

Much of the published work focuses on a few select factors and, in doing so, fails to capture the complexity of vulnerability and its contextualised manifestation in a given
place. But there is a more fundamental problem with current research on destination vulnerability; there are few theoretical parameters for furthering our knowledge and guiding more comprehensive assessments.

The second insight is the concept of resilience. Studies on tourism and resilience are very recent and are gaining momentum (Hall, Prayag & Amore, 2017). To date we can identify different definitions of resilience that are relevant to destination policy and planning. While Lew (2014) recalls the concept of ecological resilience deployed by Holling (1973), Larsen, Calgaro and Thomalla (2011) adopt the definition of social resilience introduced by Pelling (2003) and link it to the “conception of governance as a negotiated and contested normative process” (Larsen et al., 2011, p. 489). Becken (2013), instead, develops a conceptual framework of destination resilience that encompasses the different perspectives of relevant tourism stakeholders, while Adie (2019) stresses the importance of the individual’s response and resilience to disaster in destination contexts. It might be argued that scholars are currently some distance from an agreed definition of destination resilience (Hall et al., 2017). Nevertheless, it should be acknowledged that such definitions vary depending on the focus of the study and the type of disaster/crisis affecting the destination. This point is further illustrated by Lew (2014), which conceives destination resilience as the ability of hospitality entrepreneurs and host communities to absorb a given disturbance caused by either slow changes or sudden shocks.

Recent advancements in the conceptualization of destination resilience tend to provide a multi-faceted notion that links to the different dimensions identified in the literature and the concepts of vulnerability and risk reduction (Amore, Prayag & Hall, 2018; Hall et al., 2017). On the one hand, destination resilience acknowledges “how, even though one element of a destination may be affected by change or disaster, other parts may be able to respond and even thrive under new conditions” (Hall et al., 2017, p. 107). On the other hand, Luthe and Wyss (2014, p. 161) conclude that “change processes and their interrelations have become

<table>
<thead>
<tr>
<th>Item</th>
<th>Concept</th>
</tr>
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<tbody>
<tr>
<td>Researcher</td>
<td>Person as individual and her/his capacity for reflection and openness during data collection and analysis. Ability to be empathic and reflexive in interacting with communities and to be willing to learn from them.</td>
</tr>
<tr>
<td>Observables</td>
<td>Refers to the data that come from the experience of the researcher, they can have two variables of an objective reality (tangible and material existence) and a subjective reality (intangible existence).</td>
</tr>
<tr>
<td>Interdefinability</td>
<td>Emphasis on the non-independency of observed elements and their relevance as constitutive parts of complex systems</td>
</tr>
<tr>
<td>Interdependency</td>
<td>Emphasis is on the connectedness between elements and their environment, from these connections there is a need to provide solutions that allow the reorganization of the system.</td>
</tr>
<tr>
<td>Limits</td>
<td>The limits are not a barrier for the system to relate to its environment. All of them have the same importance, outside the complex system. It is necessary to delimit the complex system to carry out the investigation.</td>
</tr>
<tr>
<td>Elements</td>
<td>Components of the complex system have the characteristics of being interdefinable. The elements help the structure of the system, so they may be necessary to analyze the complex system.</td>
</tr>
</tbody>
</table>
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more complex in a globalized, accelerated world, placing tourism under pressure to respond and adapt to various factors”. Ultimately, destination resilience and vulnerability reduction can be best understood through a multilevel perspective that frames landscape, regimes, niches and actors as integrated elements in the destination system (Amore et al., 2018). The interrelation between actor and structure underpins the theory of structuration (Giddens, 1984) on “how human agency simultaneously creates and responds to the objectified socio-ecological order” (Larsen et al., 2011, p. 482).

Complex Systems Theory and the notions of destination vulnerability and destination resilience are strongly linked to the sustainability paradigm (Hall et al., 2017; Ruiz-Ballesteros, 2011; Xu, Marinova & Guo, 2015). Resilience thinking and the proactive role of communities in reducing socio-ecosystem vulnerabilities are key to pursuing the long-term sustainability of destinations (Ruiz-Ballesteros, 2011). At the same time, sustainability management in tourism planning and destination resilience-building should be conceived as two sides of the same coin in order to achieve societal development and thus reduce vulnerabilities (Hall et al., 2017; Xu et al., 2015). As Hall et al. (2017, p. 151) further explain:

Resilience therefore contributes to thinking about sustainability as well as providing a basis for decision-making for sustainability, but it does not replace the concept. Instead, the concept of resilience potentially reinforces the need for better understanding of systems and the interconnections between the different dimensions or ‘pillars’ of sustainability and the central role that the environment and natural capital plays.

Building on Amore et al. (2018), Dredge and Jenkins (2011), Hall (2008) and Hall et al. (2017), we can identify six key attributes of sustainability relevant to vulnerability and resilience in tourism policy and planning. Emphasis is put on the capacity of stakeholders to be able to change, adapt and implement policies that reflect the specific socio-political and socio-cultural underpinnings of local communities at large. Ultimately, a networked community approach is key in the reframing the governance of destinations towards more participatory and deliberative metagovernance archetypes (Amore & Hall, 2016). Inclusive stakeholder networking is crucial to ensure the participation and ownership of the wider community in tourism planning and policy-making (Hall, 2011), particularly in the management of conservation and pro-poor tourism initiatives in less-developed countries (Nantongo, Byaruhanga & Mugisha, 2007; Zapata, Hall, Lindo & Vanderschaeghe, 2011).

Community-based tourism (CBT) represents a viable approach that can help reframe current tourism policy and planning discourses towards sustainability, resilience building and vulnerability reduction. The concept of CBT was first introduced in the 1980s (Murphy, 1985) to define tourism services directly activated and operated by communities to the benefit and diversification of rural economies (Piéet et al., 2012). CBT practices allow Indigenous communities in rural regions to collectively manage their resources and associated tourism services (ACS, 2019; Montoya, 2013), enhance their tourist appeal and generate sustainable practices for economic, social and environmental sustainable development (Azevedo, 2007; Kiss, 2004; Palomino, Gasca Zamora & López Pardo, 2016). The importance of CBT within the framework of resilience is acknowledged in the literature. As Ruiz-Ballesteros (2011, p. 664) observed in the study of Agua Blanca, Ecuador, a communitarian approach to tourism planning:

Encourages resilience since it helps members of the community to live with change and uncertainty in mind, nurture the diversity of the socio-ecosystem, combine different
types of knowledge and create opportunities for self-organization on the basis of equity in the access and distribution of resources.

The nexus between complex socio-ecological systems, resilience and vulnerability, a sustainable development paradigm and the key role of Indigenous communities calls for a redefinition of tourism policy and planning that blends academically rigorous rational knowledge with vernacular knowledge, the latter of which is defined as the transmission of popular knowledge from generation to generation. On the one hand, the rationalization common to planning professionals and academics facilitates “the planning and management of a hospitality network for development regulated via bottom-up consensus” (Costa, 2013, p. 2). On the other hand, traditions and folklore are priceless attributes common to rural communities that need to be preserved and enhanced to sustain socio-ecological balance in the face of short- and long-term environmental triggers (Petrini, 2013).

2.3 Harmonic Tourism Methodology (HTM) as a basis for project planning

The HTM arises from the notion of harmonic tourism proposed by Serrano-Barquín (2008). She conceives tourism as the linchpin that connects the principles of sustainability, the environmentally intuitive-rational use of natural and cultural resources and their complementarity within complex systems. Nature is the basis of life and it is the essential condition for any social activity, including tourism, to exist (Serrano-Barquín, 2008). A series of steps are needed for tourism to actually constitute the harmonic denominator for the implementation of development practices that respect both nature and society (Serrano-Barquín et al., 2010). The HTM provides the ultimate method to empirically apply the principles of harmonic tourism in destination contexts. A first application of the HTM was made in the community of San Pedro Tultepec de Quiroga (Mexico) (Palmas, 2015) and, more recently, in the communities of Acatzingo, San Juan Atzingo and Malinalco (Mexico) and Santa Fe de Antioquia (Colombia). Building from the evidence collected in these five different contexts, Figure 2.1 illustrates in detail the steps of the HTM.

As shown in Figure 2.1, the first step is the identification of the problems for the communities. It is during this phase that the HTM enables one to define those socio-ecological vulnerabilities that need to be solved or mitigated. This can help in both defining new community-based projects and reframing current projects. In the cases of Malinalco and Santa Fe de Antioquia, there were emerging vulnerabilities among local residents as result of a top-down tourism development approach. These included impacts on public services, a surge in temporary and low-paid jobs and an increase in land values.

Conversely, the communities in San Pedro Tultepec de Quiroga Acatzingo and San Juan Atzingo had to cope with high levels of pollution in the wetland, with no support or poor community-based tourism planning approach from government. In San Pedro Tultepec de Quiroga the communities sought to desiccate the wetland to quickly reverse economic decline. Other environmental vulnerabilities were observed in San Juan Atzingo, with biodiversity loss and increased deforestation and their relevant consequences, particularly among Indigenous groups. Finally, in both San Juan Atzingo and Acatzingo, immigration and lack of equal opportunities were observed among other major socio-demographic vulnerabilities. These vulnerabilities further undermined the unique mix of cultural and natural resources in the region.

The second step of the HTM is the characterization of the complex system. It is at this stage that the methodology distinguishes between two subsystems: on the one hand, the biotic elements that characterize the local natural environment and, on the other hand, the anthropic
elements that ascribe to the social, economic, political and technological dimensions of communities. The audits in Malinalco and Santa Fe de Antioquia showed similarities with regards to complex system characterization. These included historic settlement and development, local microclimate, flora and fauna and the welcoming nature of the local communities. Ultimately, these features were all considered in the framing of each of the two sites.

In the case of San Pedro Tultepec, the local complex system was framed from longitudinal and spatial perspectives. From a longitudinal perspective, emphasis was put on the desiccation of the area resulting from the water supply project for Mexico City between the 1940s and the 1970s. From a land-use perspective, the wetland is a protected natural site under the Ramsar Convention. The community living in the area is a combination of biotic and anthropic features that are reflected in the local gastronomy, music, popular culture, beliefs and arts and crafts.

A rich mix of cultural and natural resources characterizes the complex destination systems of San Juan Atzingo and the Tlahuica Indigenous community. The latter has a long tradition in the area, dating back to pre-Hispanic domination, with customs and traditions carried for generations. Unlike other communities in San Juan Atzingo, the Tlahuica community identity