Methodological proposal for the emergence of touristic projects of the local community

Propuesta metodológica para la generación de productos turísticos a partir de la comunidad local

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Abstract

The new social, economic and environmental demands make necessary to design touristic projects where the local community is considered as the foundation for their creation and development. The main objective of this article is to elaborate a methodological proposal to design touristic projects based on the participation and management of this community. In this sense, the literature review is used to develop touristic projects through the local community, since it is the local community that stands out as a forgotten part in the generation and management of touristic projects. Thus, the methodological proposal consists of eight stages: I) Sensitization of the local community, II) Contextualization of the place, III) Design of the tourism product, IV) Identification and analysis of the demand, V) Decision of the price, VI) Commercialization, VII) Market Test and VIII) Implementation of the touristic project and follow-up. Although the generation of touristic projects is a heterogeneous task, and it depends on many intrinsic and extrinsic elements, this document aims to be a general guide which helps to integrate the residents of the destination as managers of tourism activity.

Resumen

Las nuevas exigencias sociales, económicas y ambientales hacen necesario el diseño de productos turísticos donde la comunidad local sea considerada como el pilar fundamental para su creación y desarrollo. En este sentido, el objetivo central de la presente investigación es elaborar una propuesta metodológica para el diseño de productos turísticos a partir de la participación y gestión de este actor. En este sentido, la revisión de diferentes propuestas destaca la necesidad de crear una metodología para desarrollar productos turísticos a través de la comunidad local, pues es ella quien resalta como un actor olvidado en la generación y gestión de los productos turísticos. De esta forma, y cubriendo este vacío, la propuesta metodológica se compone de ocho etapas: I) Sensibilización de la comunidad local, II) Contextualización del lugar, III) Diseño del producto turístico, IV) Identificación y análisis de la demanda, V) Decisión del precio, VI) Comercialización, VII) Prueba de Mercado y VIII) Puesta en marcha del producto turístico y seguimiento. Si bien, la generación de productos turísticos es una labor heterogénea, y depende de muchos elementos intrínsecos y extrínsecos; este documento pretende ser una guía general que ayude a la integración de los residentes del destino como gestores de la actividad turística.

Keywords | palabras clave
Planning, methodology, tourism products, local community, actor, participation.
Planificación, metodología, productos turísticos, comunidad local, actor, participación.


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1. Introduction

Tourism is one of the most important economic activities worldwide. Therefore, the creation of tourist products is important, because it would diversify the offer of attractions in the destinations and, therefore, satisfy the needs of the tourists. Thus, authors such as Bote (1990), Boullón (1994), Acerenza (1998), Godfrey and Clarke (2000), Gunn (2002), Zamorano (2002), Ivars (2003) and even the World Tourism Organization (1999), have been generating tourism planning models.

Despite the foregoing, the planning and creation of tourism products applied to developing countries continue to manage resources in a “traditional” way, in which macroeconomic coverage prevails, leaving social and environmental aspects (Ivars, 2003). Also, even though sustainability became the guiding principle of tourist planning, only the perspective towards an economic-environmental aspect has changed (Osorio, 2006).

Thus, few tourist destinations are addressed to integrate the local community, although this is one of the actors that can detonate local development (Aref, Gill, & Farshid, 2010; Sebele, 2010). Therefore, the term “community based tourism” has emerged, which generally refers to the generation and management of tourism as a result of the same community or local actors in the destinations.

Thus, Beeton (2006) proposes to generate planning models and more inclusive and effective management proposals from community-based tourism. For this reason, the objective of this work is to propose a methodology that integrates the local community in the generation of tourism products, not only as attractive for the natural and cultural resources that it has, but as a participatory actor who propose, develop and carry out such products.

For this reason, this article conducts a review of different methodologies or proposals for planning tourism products, retaking some information of the academia, consultancies and government agencies, among which are an incipient participation and integration of the local community as a principal actor. Thus, this work is organized in six parts: 1) Community tourism, II) local community and its integration in the generation of tourism products, III) tourist product, IV) methodology used, V) analysis of the different ways of making a tourism product, and finally, VI) the methodological proposal.

1.1. Community tourism

According to Goodwin & Santilli (2009) and Beeton (2006), the “community based tourism” begins to be used at the end of the XX century, and arises from the need to manage alternative tourism through a sustainable way. In this way, this management takes from sustainability its three main dimensions: environmental, economic and social (García, Figueiró, & Silva, 2013).

Although it has delved into the approach of Community tourism, the literature concludes that this is polysemic and often refers to projects related to local communities (Rodrigues, Corbari, Cioce, & Jureemma, 2014). There have also been other terms that hinder their conceptualization, such as ‘Community Management’ (Ávila, 2002; Mehedi, Mohammed, Nassani, & Nurul, 2017) “community-based enterprises”
(Monyara & Jones, 2007; Senyana & Moren, 2011) or “community rural tourism” (Montoya, 2013). However, these terms do not clarify their scope, implications or theoretical sustenance, causing difficulties to define it (Ernawati, Sudarmini, & Sukmawati, 2018).

Nevertheless, some proposals have emerged from the academy to define ‘community tourism’. One of them is elaborated by Dernoi (1988, quoted in Pearce, 1992), who mentions that it is a set of services offered by the local community, with the aim of establishing a direct interaction with visitors, emerging a mutual understanding between hosts and guests. It should be emphasized that this definition generates some gaps; however, the author points out a core element, which is that the local community is the one that has to generate the offer of services (accommodation, food, recreational activities, among others). This agrees with what was mentioned by Torres (2015, p. 70) by saying “it must be the same community who manages the resources that it has. They give meaning to these in a permanent process in which they are involved”.

It is also possible to find some other definitions that mention specific elements, visualizing community tourism as a strategy to value historical elements (Sampaio, Alves, & Falk, 2008; Hiwasaki, 2006); While others make emphasis on local-visitor interaction and their experiences (Jamal & Getz, 1995; Nyaupane, Morais, & Dowler, 2006; Sampaio, Alves, & Falk, 2008). Some others focus more on the form of participation (active and passive) of the local community in the management of natural and cultural resources (v.g.r. Hiwasaki, 2006; Okazaki, 2008; López-Guzmán & Sánchez, 2009; Sebele, 2010).

Although it is possible to find different definitions of “community tourism”, features can be identified as single one:

- There is direct interaction between local community and visitors.
- Cultural and economic exchange between local community and visitors.
- “Authentic” experiences from the daily life of the locals.
- The local community is the main beneficiary.
- Conservation and preservation of cultural and natural heritage.
- The community is in charge of the management of the resources and tourist services.
- Community tourism is possible “only” at the local level.
- The local community is influenced by the tourist activity in its social, environmental and cultural dimension.

These aforementioned characteristics contextualize community tourism, which has been used to legitimize the tourism industry, given empowerment to communities (Blackstock, 2005). Fernandez (2011) argues that the way to promote the process of collective empowerment in tourism is the community participation of

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1 While community tourism is intended to be a new position for addressing social problems (poverty, inequality, development, among others); its action is linked to the local scope (Cfr. Blackstock, 2005; Beeton, 2006).
the people who live in the area. This is the situation that distinguishes community tourism, in which the participation of the local community is essential to carry out the tourist activity.

In this sense, community tourism is not established as a new type of tourism, but a way of planning and managing the tourism activity through the actors related to it, giving priority to the local community.

1.2. The community and its participation in tourism products

According to Singh, Timothy & Dowling (2003) and Monterrubio (2009), it is possible to recognize two clear tendencies to define the community. The first is the geographical perspective, which refers to the space where a group of individuals converge, delimiting their forms of lives and economic activities. The second trend is social and anthropological, where the community goes beyond the geographical space and the inhabitants, taking into account relationships, customs, traditions, values, among others.

In this context, it should be mentioned that the term ‘community’ includes elements such as geographic space, traditions, customs, beliefs, language, among others. It is also recognized the capacity of the members of the community to interact in the different social, economic and cultural processes, and therefore in tourism (Boyd & Singh, 2003). However, many of the models of tourism development predispose the economic benefit to the social, causing that the participation of the communities to be almost null (Blackstock, 2005; Sánchez, 2009).

Ruhanen (2009) reaffirms that the local community has not been taken into account in the planning of tourist destinations, despite the fact that the literature suggests its effective participation for the development of tourism. In fact, when the community is integrated into the decision-making, its intervention is many times limited, because only opinions regarding tourism are taken into account, or only know the possible economic benefits and some costs that this economic activity causes (Blackstock, 2005). For this reason, Sánchez (2009) emphasizes that despite the generation of jobs, there are no other social benefits for the local community.

Therefore, it recognizes the importance of incorporating the local community in the management and development of the tourist activity, in order to avoid situations of inconformity, dissatisfaction or indifference of the residents. Thus, Boonratana (2010), through the analysis of literature, recognizes the advantages of taking into account the local community for the development and management of tourism products:

- Communities preserve a traditional way of life and culture;
- Tourism in communities is planned, developed and managed with their consent;
- Communities are actively involved in the planning, development and management of tourism activities;
- The process of planning, development and management of tourism helps to unify, empower and instill pride in communities;
- Communities are empowered to plan, develop and manage tourism complementary to their lifestyle;
• All residents of the communities have the same opportunities to obtain benefits;
• Income generated is an additional or alternative source, or it is used to alleviate poverty;
• Part of the tourist income is reserved for projects that collectively benefit the communities;
• Tourism fosters the preservation/conservation of the cultural and natural heritage of communities;
• Tourism stakeholders are aware of the negative impacts of tourism and have measures to mitigate them;
• Visitors are informed of the social and cultural norms of the communities before or after their arrival, thus encouraging responsible behavior;
• Exchanges between visitors and communities foster tolerance, the understanding and the intercultural learning; and
• The actors of tourism are obliged to avoid the commodification of rituals and ceremonies (especially sacred and/or religious).

Despite the advantages of involving the local community in planning and developing tourism, the literature recognizes that the local population is commonly a forgotten actor (v.gr. Noia, Avila, & Cartibani, 2009; Waligo, Clarke, & Hawkins, 2013; Jovicic, 2014; Luna, 2014); because in most of the destinations they participate in an incipient or null way as far as the decision making on the tourist development. It is also recognized their difficult incorporation, either by political obstacles (Jaime, Casas, & Soler, 2011; Palomino, Gasca, & López, 2016), indifference towards activity (Ibañez, Ivanova, & Amador, 2010; Teye, Sönmez, & Sirakaya, 2002), as well as the lack of ability of tourism managers to raise awareness and make them participate (Ruiz, Hernández, Coca, Cantero, & Del Campo, 2008).

1.3. The tourist product and its characteristics

The tourist product is defined from several perspectives. From the economic point of view, it is conceived as the cash flow present in the sale of leaders to facilitate travel (De Borja, Casanovas, & Bosch, 2002). However, other authors generate definitions that try to understand the whole of the tourist product. Crespi & Planells (2006) argue that the tourist product is determined by the goods and services offered for tourists.

Although there are endless number of definitions on tourist products in the literature, Ugarte (2007) delves into its characteristics, which are listed below:

• **Tangible and intangible:** tourism products have tangible components; for example: a hotel bed, amenities, etc. The intangible part, are all those characteristics based on expectations such as motivation, use or experience.
• **Expiration:** It is not possible to store these for their later enjoyment.
• **Addition and substitutability:** No component of the product is indispensable, so one can be replaced or added.
• **Heterogeneity:** No product is equal to another.
• **Subjectivity:** The customer’s opinion will be different at the time of consumption.
• **Individuality:** The experiences they produce are individual.
• **Immediacy:** Its consumption is simultaneous to its actual manufacture.
• **Simultaneity of production and consumption:** The product is created, produced and consumed at the same time.

According to the latter, the qualities of tourism products differentiate them from others that originate in other economic sectors. Thus, the product is also composed of elements of sociological and psychological order, because their creation satisfy the human needs or desires. Therefore, Villalva (2011) lists some of these:

1. **Attractions:** Are the things or places that motivate the visit of the tourist.
2. **Access and facilities:** They are the means to obtain the tourist product.
3. **Cultural heritage of people:** It is all related to the culture of a particular social group; which can also become the main motivation for visitors.

The first and last points give an opportunity to recognize the local community as an important factor in the generation of tourism products (Monterrubio, 2009), because the attractions and the cultural heritage belong to this community. In this sense, tourism products should be considered as an opportunity for development and growth, not only economic but also social, so there is a need to involve the local community in the processes of creation and development of tourist products.

2. **Materials and method**

The main objective of this research is to make a proposal methodology for the planning of a tourist product from the local community as principal actor. To achieve this goal, this work was carried out in two major phases: the first included the search, comparison and analysis of different methods for the creation of tourism products, which were designed by academics, public and private sector; while the second phase consisted in the elaboration of a new methodological proposal.

The first phase consisted of two stages: the first, focused on the search for scientific literature in repositories, databases and indexes such as Redalyc, SciELO, Sage Journals, Sciencedirect, among others. While the second explored the web to access other works that proposed methodologies for the elaboration of tourism products.

To study the proposals, investigations of Machado and Hernández (2007) were used, since they carried out an analysis of the procedures for a tourist product, which must meet certain requirements, such as: objectives, customer needs, ideas generation, product concept, marketing strategies, business analysis, product development, market testing and product launch. In this regard, the following elements were postulated for this research:

• **Objectives:** aim of the creation of the tourist product.
• **Market study:** analysis of the demand for the product.
• **Offer study:** evaluation of the attractions that the local community has.
- **Product development**: generation of ideas and creation of the “main idea” of the tourism product.
- **Marketing strategies**: actions for the promotion and sale of the product.
- **Market test**: a pilot test is carried out before launching the tourist product to the market.
- **Launching of the product**: activities to launch the tourist product to the market.
- **Follow-up**: activities to follow up on behalf of the managers.
- **Sensitization of the local community**: to make known the community in general, and specially the positive and negative elements that it has with the tourism.
- **Stakeholder mapping**: stakeholder identification for the product management.
- **Type of participation of the local community**: type of participation of the local community, which may be passive, active or null.

In this way, a study of different planning models for tourist products was carried out, in which it was identified if the proposals had the elements that were previously mentioned. It should be said that although many proposals did not have the specific name of the item to be analyzed, they did have a similar section. The methodological proposal was made from the identified weaknesses.

### 2.1. Review of methodological proposals

The design of tourist products is an artistic and original work that involves the search for economic, social and environmental benefits (Machado & Hernández, 2007). In this way, the procedures are varied and have different stages, elements, factors and objectives; This is due to the different contexts that people, institutions or organizations that created them.

From the critical analysis of the literature, 15 proposals were found to develop tourism products, in which it was possible to find methodologies based only on supply and demand (v. gr. Machado & Hernández, 2007; Luna & Polo, 2009; Consejo Nacional de Cultura y las Artes y Patrimonio Consultores, 2011; Machado, 2013; Fondo Nacional de Turismo, 2014; Programa de Cooperación al Desarrollo Económico. Secretaría de Estado para Asuntos Económicos SECO. Embajada Suiza en Perú, 2014; Servicio Nacional de Turismo, 2015; Castillo, 2015; Cardet, Palao, & González, 2018), meanwhile, there are proposals that believe in the inclusion of the members to promote the development (v. gr. Fundación CODESPA, 2011; Gómez, 2014; Saravia & Muro, 2016; Paul, 2016; Reyes, Ortega, & Machado, 2017).

Generally, most of the proposals contemplate a null or passive participation of the local community, since being based on the supply and demand (economic approach), the local actors are only limited to provide services and do not participate in the planning of the products, a situation that is not beneficial for the local development (Reyes, Ortega, & Machado, 2017). Additionally, Saravia & Muro (2016) mention that tourism products must be validated by the community.
### Table 1. Methodologies analysis

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### Elements

1. Objectives
2. Market study
3. Offer study
4. Product development
5. Marketing strategies
6. Market test
7. Launching of the product.
8. Follow-up
9. Sensitization of the local community
10. Stakeholder mapping
11. Type of participation of the local community

Source: own elaboration based on the analysis of the authors cited
Additionally, Mikery & Pérez-Vázquez (2014, p. 1739) mention that “it is necessary to generate more robust and inclusive methods that would promote the management of touristic; i.e., integrative, participatory approaches and in a multifunctional use process”. Thus, it emphasizes the inclusion in the elaboration of touristic products through the active participation, where the locals generate the ideas and accompany the management, the development, the products and programs (ob. cit).

3. Methodological proposal for the generation of tourism products from the local community

There is now a growing responsibility to create tourist products that will benefit the different tourism stakeholders, mainly the local community. In this way, the following methodology is proposed, divided into eight stages for the creation of the tourist product (see Figure 1).

According to previous figure, the following stages are presented: 1) Sensitization of the local community, 2) Contextualization of the place, 3) Design of the tourist product, 4) Identification and analysis of the demand, 5) Price Decision, 6) Marketing, 7) Market Test and 8) Startup and follow-up of the tourism product; Also, it is necessary to fulfil a series of phases and steps to carry out some of these.

![Figure 1. Methodology for the elaboration of the product](source: Own elaboration.)
3.1. Previous phases

3.1.1. Stage 1: Awareness of the local community
At this stage, awareness-raising sessions are held with the local community, which aim to evaluate the acceptance of the creation of the tourism product, presenting the benefits and costs that tourism can bring to its community. In case of not being favorable, it is dispensed of the associated tourist product.

If the proposal is accepted, a working group shall be created. This group must contain members of each one of the actors found in the tourist destinations (social, cultural, economic, public and private). According to Saravia & Muro (2016), these actors will depend on the characteristics of the destination. It is also important to mention that incorporating the participation and collaboration of each tourism-related actor will allow them to feel empowered with the project (Sebele, 2010).

3.1.2. Stage 2: Contextualization of the area
The characterization of the area is done where the new tourist product will be found.

3.1.3. Stage 3: Tourism Product Design
The product design process comprises two phases: elaboration of the tourist inventory and the creation of the main idea, described below. In this sense, it is important that the working group and the local community evaluate the attractiveness equally, as some authors (v. gr. Cardenas, 2006; Hernández, 2001; Machado & Hernández, 2007; Villalva, 2011; Waligo, Clarke, & Hawkins, 2013) believe that tourist resources must be a tourist attraction through a technical process and different points of view.

To follow these steps, it is advisable to use the focus groups research technique, which is an interview with more than one person, where they address a predetermined subject in the presence of a moderator (Peterson & Barron, 2007; Bryman, 2012). In this way, the local community will participate in the definition of the tourism product and the enterprises shall be the intellectual property of the community.

3.2. Planning phases

3.2.1. Phase 1: Development of the tourism inventory and evaluation
This phase will be subdivided into two: the first comprises the elaboration of the tourist inventory, while the second refers to the evaluation of the different resources that are on the area for their subsequent use.

The tourist inventory
A tourist inventory allows the selection of the available attractions of a territory and identifies the places of tourist interest in order to choose those considered priority, in which projects should concentrate (Bote, 1990). In this way, it is suggested to use the criterion of Hernández (2001), who classifies them in two in order to identify the tourist attractions:
• **Natural Attractions**: These are elements created by the nature.
• **Cultural Attractions**: Human manifestations that relate to culture (traditions, customs, handicrafts, among others).

*Valuation and evaluation of the resources/tourist attractions*

For the tourist product, it is necessary to qualify the attractions which must be made from its characteristics, and must respond to four basic elements:

• **Quality**: It is the intangible and subjective value inherent in itself, centered on the originality of the attractions, and generating interest in the visit.
• **Accessibility**: It refers to the physical conditions to reach the attractions or places of interest.
• **Security**: Are those operating characteristics that make the attractive functional.
• **Use for tourist activities**: It is the viability of the attraction to assist the tourists.

### 3.2.2. Phase 2: Creation of the main idea

In this phase, the aim is to conceptualize the idea of what is wanted in the product. It is divided into seven steps:

1. **Generation of ideas**: the local community contributes to ideas about the tourist activities that can be developed.
2. **Selection of ideas**: to choose ideas that meet the viability criteria (social, environmental, cultural and economic).
3. **Definition of the concept**: the local community conceptualizes the activities to be developed for the product, to define its type.
4. **Determine the competitive advantage**: The community contributes to ideas in order to distinguish the product from similar ones.
5. **Selection of services and equipment of the activities**: identify what elements are necessary for the development of the product, among them the human capital, the material resources, economic, normative, among others.

### 3.3. Implementation phases

#### 3.3.1. Phase 4: Identification and Analysis of demand

The objective of this stage is to identify and analyze the possible demand that the tourist product can consume. To undertake a project, it is necessary to verify if there is a market opportunity (Go & Govers, 2000). From this, it is necessary to carry out an analysis of the information related to the current trends of the main issuing markets, their behavior, motivations, among others (Gómez, 2014).

#### 3.3.2. Phase 5: Price Decision

The price will be fixed by the profit range wanted to obtain, taking into account the production cost and the amount that the consumers could pay.
3.3.3. **Phase 6: Marketing**

In this phase, the distribution channels of the product are chosen based on the result obtained in stage four (3.3.1). In addition, it is proposed the creation of a “brand” that distinguishes the product offered in the place, since it can help to consolidate a tourist product (Kotler, Haider, & Rein, 1993).

3.3.4. **Phase 7: Market Test**

The objective of this stage is to test the product “with a group of tourists belonging to the selected market segment” (Gómez, 2014, p. 165), which consists on adjusting the itineraries, being able to reconsider the processes of the activities.

3.3.5. **Phase 8: Start-up and follow-up of the tourism product**

This phase is the end of the elaboration and management of the tourist product, which will have a solid proposal of activities, services and benefits from a complete tourist experience, which carries a tourist product (Machado & Hernández, 2007). In addition, there should be a gradual follow-up to the actions carried out, since it is possible to implement a continuous improvement from the review of the processes, in order to consolidate, integrate and diversify the supply of services.

4. **Discussion and conclusions**

Currently, tourism activity is viewed as a development tool for people living in the destinations. However, it has tried to include the participation of the local community in tourism with little success (Ruhanen, 2009; Sebele, 2010). Therefore, it is essential to generate an integrative planning process, where the local community is recognized as a fundamental element for the creation and management of tourism products. In this sense, community tourism has its origin, not as a new typology of tourism, but as a way of planning and managing tourism, based on the sustainability paradigm.

Although, there are proposals for the planning and generation of tourism products (v. gr. Bote, 1990; Boullón, 1994; Acerenza, 1998; Godfrey & Clarke, 2000; Ivars, 2003; Saravia & Muro, 2016), scientific literature stands out the exclusion of the local community in the planning process local (v. gr. Ruhanen, 2009; Sebele, 2010; Waligo, Clarke, & Hawkins, 2013; Saravia & Muro, 2016), particularly because of the political situations, indifference towards the activity or the little sensitization work carried out by the tourist managers. Therefore, this research made a proposal of an integrative methodology for the creation of a tourist product, in such a way that it integrates the local community in a participatory way.

Despite generating this proposal, there are two main constraints envisioned in its application: the first, focused on the refusal or resistance to participation by the local community with the creation of tourism product or tourist in general. It is worth mentioning that this depends on the skills of the managers, because in many of the times they do not have the power to interact with the local community (Mair, 2012), representing a challenge to study and discuss in future researches.
The second constraint is that this methodology is not used for planning ‘macro’ tourism projects, because it is focused on small groups. Therefore, Monterrubio (2009, p. 107) mentions that:

[...] Local-level planning allows greater opportunities for successful tourism development; in addition to ensuring better living conditions in the social, cultural, economic and ecological areas of the receiving community. It is precisely at this level that the incorporation of the local community plays an important role in the planning and successful management of tourism development.

On the other hand, the advantage and difference of this proposal with other methodologies is in the sensitizing process of the local community, because in many cases this actor has little knowledge about what tourism means and the costs and benefits that this provokes (Aref, Gill, & Farshid, 2010). Thus, the members of the community are the ones who propose and define the type of tourist product to be implemented, based on the knowledge they have on the geographic space and of their natural and cultural resources.

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