

Paths to the Market: analysing Tourism Distribution Channels for Community-Based Tourism

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Abstract

This research investigates distribution channels as a critical business mechanism for community-based tourism (CBT) by connecting CBT enterprises to the market. Specifically, the paper is guided by the research question of how the paths to the market can be improved for a culture & heritage focused CBT enterprise in Cambodia. In addressing this question the paper explores both the distribution channels structure and the key influencing factors behind the observed structure. The paper is informed by 21 interviews which were conducted with respondents from Banteay Chhmar CBT, key intermediaries, NGOs, local and central government, and CBT experts. The examination of the distribution channel structure reveals considerable channel diversity which sees both direct and a variety of indirect channels included in the distribution mix. Due to the community-guided nature of the CBT project, intermediaries had a very strong presence in the distribution structure and maintained both direct and multi-layered indirect channels with consumers. Five factors were identified to underlie the observed distribution structure: commissionable product, product characteristics and market access, information and communication technology, partnership issues, and community capacity. Based on these findings a range of recommendations are proposed that seek to improve the distribution channels-related economic sustainability of the CBT project.

Keywords: CBT, Cambodia, distribution channels, factors, economic sustainability

Introduction

Many countries in South East Asia have been experiencing a rapid increase in tourist arrivals over the last five to ten years. For instance between 2011 and 2015 Thailand reported an increase from 19.2m to 29.9m, while Viet Nam has seen arrivals increase from 6.8m to 10m between 2012 and 2016. Cambodia mirrors this rapid increase with arrivals increasing from 3.5m in 2012 to 5m in 2016 (UNWTO, 2017). While many parts of South East Asia are reaping significant economic benefits from this growing tourism market the rural areas are mostly ignored by the hordes of international tourists. In response there has been a significant interest in the concept of Community-based Tourism (CBT) to diversify the economic benefits of tourism into the peripheral regions of these countries. For instance Cambodia has 13 CBT projects located throughout the country (Tourism Cambodia, 2017), of which many include more than one village in seeking to spread the economic benefits across many households. Although economic sustainability, defined as the level of economic gain from an activity sufficient either to cover the cost of any special measures taken to cater for the tourist and mitigate the effects of the tourist presence or to offer an income appropriate to the inconvenience caused to the local community visited (Mowforth & Munt, 2015), is a strong component of the CBT concept it is the most challenging to achieve. The economic sustainability is most commonly challenged by community members' limited business knowledge and skills (Spenceley, 2008) as well as limited connections between communities trying to sell its CBT product and the market (Zapata, Hall, Lindo & Vanderschaeghe, 2011) The latter point is effectively articulated by Mitchell & Ashley (2009):

“developing countries are littered with well-intentioned community-based tourism projects...developed in isolation from commercial distribution channels, they lack the client volumes needed for commercial sustainability” (p.1)

This challenge is well documented in the literature and there is vast anecdotal evidence that this issue is plaguing CBT projects in Cambodia, including the culture & heritage focused Banteay Chhmar CBT project in the country's North-West; Banteay Chhmar CBT (BCCBT) will be introduced in detail after the literature review section. Inspired by Mitchell & Ashley (2009)'s observation about the lack of effective distribution channels in CBT projects, the paper's overarching research question is "how can CBT product's path to the market be improved?". The paper initially analyses BCCBT's distribution channels structure before proceeding to an examination of the important influencing and contextual factors that shape the distribution structure. Informed by the findings a set of recommendations for improved distribution channels for CBT will be formulated.

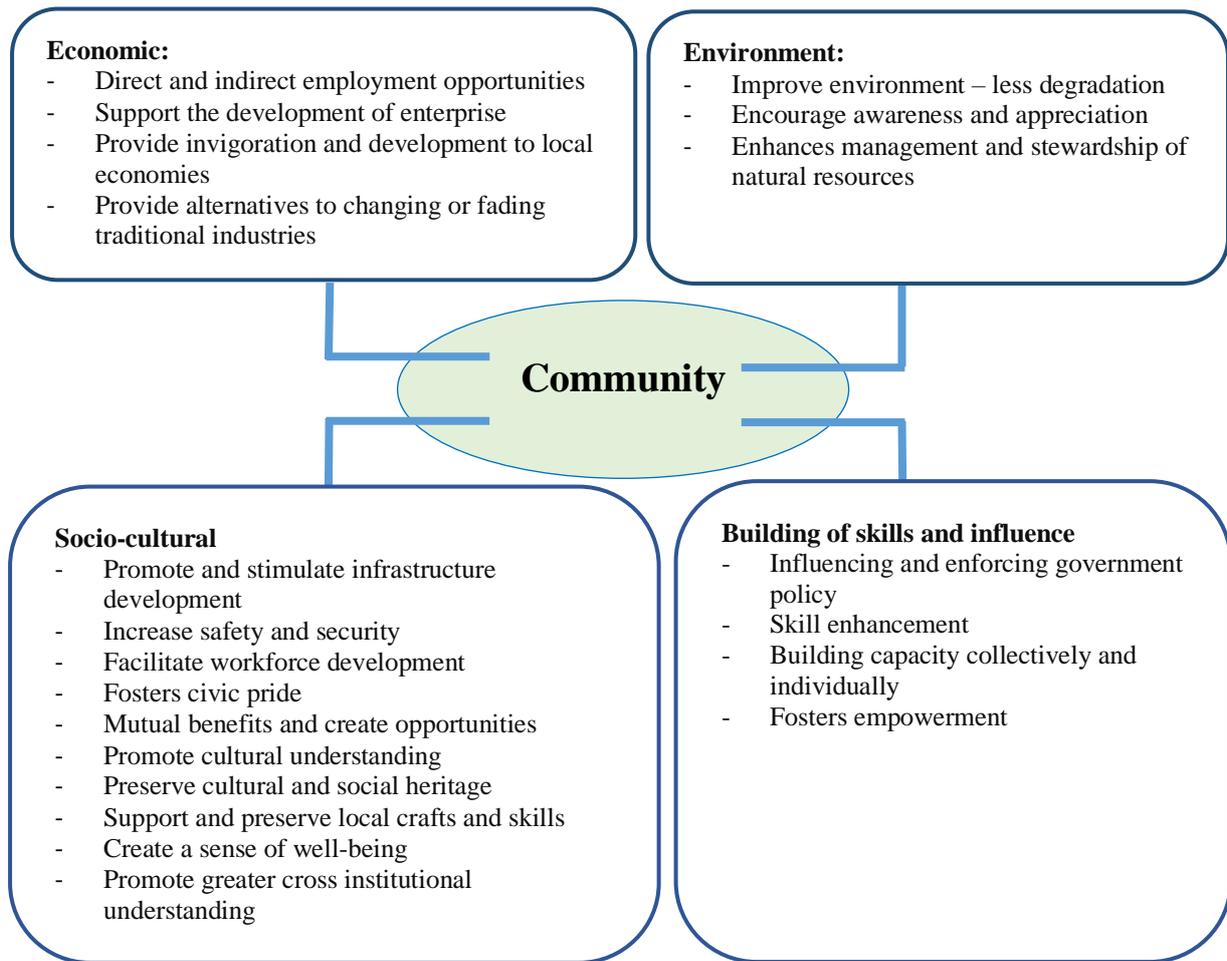
Literature Review

According to Salazar (2012) CBT is a vague term and an elusive concept. Although several authors including Mowforth and Munt (2009), Salazar (2012), and Goodwin and Santilli (2009) have contributed definitions since the concept's first appearance in 1985 (Murphy, 1985) there is no single way to conceptualize CBT (Ndlovu & Nyakunu, 2011). Despite this lack of consensus several commonalities are nevertheless evident across definitions of CBT; these include the following features: local ownership of development projects, strong and meaningful participation by locals in all stages of decision-making, transparent benefit-sharing mechanisms among community members, and meaningful host-guest interaction. CBT then is an alternative form of tourism development that concentrates on community participation in all processes from idea formulation to planning, implementation, management, monitoring, evaluation, and benefit sharing. Akin to sustainable tourism CBT encompasses socio-cultural, environmental and economic dimensions (Dangi & Jamal, 2016). Although the economic

sustainability and business-focused dimension are critical to CBT (Spenceley & Meyer, 2012), this area of research is neglected despite increasing efforts by researchers.

CBT involves a range of stakeholders (Dangi & Jamal, 2016) which results in many direct and indirect interrelationships. Stakeholders in CBT generally include the community, local and national governments, private sector and Non-governmental Organisations (NGOs) (Simpson, 2008). Tolkach and King (2015) summarise the key community-based benefits of CBT to include active community participation in tourism planning, tourism management, and profit distribution. Figure 1 displays an adaptation of Simpson's (2008) key benefits of CBT. These benefits are based on the community's perspective and cover four dimensions: socio-cultural, economic, environment, and skill and influence building. CBT development goals tend to be rather ambitious because they embrace broad issues associated with political, socio-cultural, environmental and economic dimensions (Kontogeorgopoulos, 2005). From an economic perspective, CBT should improve local living standards through local job creation (Manyara & Jones, 2007; López-Guzmán, Borges, & Castillo-Canalejo, 2011). Similarly, Lapeyre (2010) posits that CBT helps to enhance rural livelihoods and offers better economic connections locally, while minimizing economic leakages.

Figure 1: Benefits of Community-Based Tourism



Source: Adapted from Simpson (2008)

CBT is also credited with encouraging local participation, empowerment and decision-making concerning a community’s future direction (Duffy, 2002) and as such promoting democratic processes through consensus agreement. Socio-culturally CBTs can be an important catalyst to revitalize local tradition (Tolkach & King, 2015) and helping to promote local pride and self-esteem. Additionally, it encourages culture and knowledge exchange between host and guests (Kibicho, 2008) while also improving local infrastructure such as health care, transportation and communication which also benefits the community (Manyara & Jones, 2007). From an environmental perspective, CBT can be an effective tool to generate environmental and cultural awareness and conservation (Duffy, 2002; Hall, 2010).

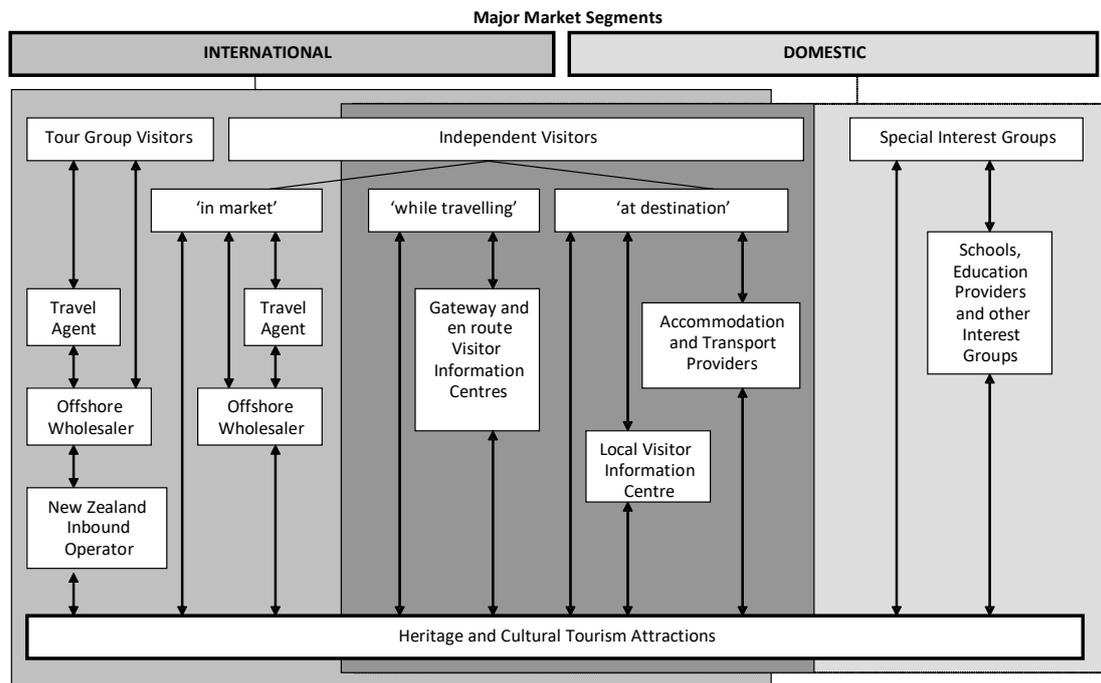
However, Matarrita-Cascante (2010), argues that such initiatives present utopian ideals which make it almost impossible for the CBT project to achieve the goals originally stated. Further criticisms of CBT include that the key processes are often beyond community control (Blackstock, 2005); indeed, some challenge the very concept of community (Salazar, 2012; Tosun, 2000). Another noticeable challenge is that CBT products have been observed to have very limited connection with the private sector or other main stream tourism products, thus limiting CBT's ambition to relieve local poverty through tourism (Mitchell & Muckosy, 2008).

Heated debates about implementation and management challenges are found in the CBT literature (Vignati & Laumans, 2010; Scheyvens, 2007). Mohamad & Hamzah (2013) suggest that many of these challenges originate from the community's limited capacity to apply sound commercial development approaches which are critical to ensure economic sustainability. Freeman (2000) argues that in order to attain cultural goals and community outcomes, business practices should be prioritized and since distribution channels are an important element in business operation they are critical for CBT success (Mitchell & Ashley, 2009).

Although the concept and practice of CBT was originally implemented in developed countries it has become more popular in developing countries, from where the majority of the literature has emerged in recent times (Vajirakachorn, 2011). The key challenge for developing countries lies in the fact that the benefits gained from CBT initiatives need to be shared widely amongst its members while safeguarding overall business sustainability (Ellis, 2011). In response Rogerson (2007) recommends that community capacity building should be prioritized while maintaining a transparent and accountable benefit sharing mechanism.

Key to the economic sustainability of CBTs are distribution channels (Mitchell & Ashley, 2009) in order to connect the product to the consumers. Unfortunately the concept of distribution channels also lacks a widely-agreed definition, however, Alcazar Martinez (2002) summarises the main objectives of a distribution channel as making *“the product available to the consumer in the quantity needed at the right time, place, state and possession utility to the consumer, thereby facilitating sales”* (p.17). Pearce (2010) adds that distribution channels are important in gaining competitive advantage and that their major function is to marry demand and supply and to build strong linkages between suppliers, consumers and intermediaries. Figure 2 depicts common characteristics of cultural and heritage based-tourism distribution channels (Pearce & Tan, 2004). The diagramme illustrates how suppliers reach different consumer markets simultaneously, which include local, international, group and independent markets. Song (2012) explains that the structure of distribution channels depicts how products or services are organized and delivered to the market through various distribution functions. Figure 2 illustrates that distribution channel structures are divided into two categories – direct and indirect. A direct distribution channel, as its name infers, is a point of sale where the suppliers deal directly with the consumers or travellers without intervention or facilitation from any intermediary. The proliferation of information communication and technology (ICT) has accelerated the growth of direct channels (Song, 2012). Some suppliers tend to focus more on direct channels because they believe that they can perform better on their own in terms of cost saving, prompt responses and greater consumer satisfaction; however, Mkumbo (2010) reminds us that direct channels are not always the most cost effective due to volume considerations.

Figure 2: Distribution channels for cultural and heritage attractions in New Zealand



Source: Pearce and Tan (2004)

Indirect distribution channels refer to a point of sale where one, two or more intermediaries are involved in facilitating the sale process. The intermediaries' involvement is critical in market access, marketing and information provision, bundling and packaging, and finally booking and payment. Christopher (1992) synthesises intermediaries' roles into bridging five gaps; time, space, quantity, variety, and communication of information. Yet, introducing intermediaries into the distribution systems generally leads to commissions which in turn decreases the suppliers' per unit profit margin (Law, Leung, Lo, Leung, & Fong, 2015). Middleton, Fyall and Morgan (2009) contend that selecting the right intermediaries is critical in the context of product marketing as intermediaries are able to ensure effective communication with consumers, facilitate the purchase of products in advance of their production, and have capacity to sell distress inventory on a last-minute basis. They add that intermediaries provide a range of essential marketing and customer services such as advertising, sales promotion and

marketing research. From a customers' point of view, intermediaries provide convenient bundling of products in the form as well as at the time and place customers require. The decision whether to select direct or indirect channels is then largely dependent on the suppliers' attitude towards different channels, the incurred costs, and the needs of the target markets (Stuart, Pearce, & Weaver, 2005). Not surprisingly, Song (2012) concluded that tourism suppliers tend to use a distribution mix which included both direct and indirect distribution channels.

Pearce and Tan's (2004) research indicates that there are three major factors determining suppliers' distribution channel choices. They are breath of product appeal, capacity issues and commission-related issues. The first refers to the appeal of the products; in other words whether the product will be widely included in itineraries. The second refers to the capacity of the suppliers in dealing with the market. The last factor is associated with indirect distribution channels where commission and/or mark-up are common and play a critical role in determining the channel preference. Since that research the proliferation of ICT has had and will continue to have a significant influence on tourism distribution channels (Spencer and Buhalis, 2014); unfortunately detailed insight into cultural and heritage focused CBT enterprises are lacking in this respect.

Banteay Chhmar CBT

Banteay Chhmar CBT (BCCBT) was selected as the case study site because, while it shares core financing and structural characteristics with other CBT enterprises in Cambodia, it is one of the most geographically remote CBT enterprises; thus rendering the issue of connecting with the market particularly pertinent for BCCBT. BCCBT is situated in Banteay Chhmar commune, located in the North Western province of Cambodia. It is in a remote area

approximately 60km from the Banteay Meanchey provincial town and approximately 450 km from Phnom Penh. Not uncommonly for CBTs, it consists of five villages which are located around the Banteay Chhmar temple complex; the main attraction. Most families participate in other work alongside the CBT project, in particular farming. The creation of the CBT was originally proposed by a French organization called Agir Pour Le Cambodge (APLC) in 2007 and now offers a range of activities which include home-stay experiences, temple and village tours, dining and local food experiences, rice flattening, as well as other activities related to village life. The structure of BCCBT centers on the tourism committee, consisting of the president, vice president, assistant, accountant, the Global Heritage Fund liaison (which started work in the community in 2009), local authority, and a head of each of the activities. There are 70 other people in the community who work directly with the committee and regularly participate in providing services and facilitating activities for tourists. Because most community members do not have sufficient knowledge about implementing and managing a CBT, a number of NGOs and government agencies have supported and facilitated a wide range of capacity building activities. These include hospitality training, the establishment of accommodation (home-stay), food and beverage services and local guide training. Visitor arrivals to BCCBT have doubled from 671 in 2012 to 1288 in 2014 (Personal Communication, 2016); a break down by socio-demographics is unfortunately not possible because visitor details are not collected by BCCBT. During the inception stage, APLC helped to promote Banteay Chhmar in Europe through printed brochures but phased out its involvement with BCCBT in 2008 due to lack of funding. Although BCCBT does not have sufficient funds to pursue marketing activities per se it launched a website a few years ago.

In view of the gaps in the literature identified this paper investigates the distribution channels for BCCBT by following three sequential aims: (1) investigate the distribution channels

structure from the perspective of the CBT and intermediaries, (2) examine the influencing factors for the observed structure, and (3) draw out implications for the distribution of the CBT products.

Methodology

A case study method was adopted as examination of internal factors and features as well as the contextual circumstances and situation were deemed important (Neuman, 2013). Creswell (2007) reminds us of the importance of selecting an appropriate case study type as it will have implications for the information yielded by the research. Stake (2005) categorises case studies into three types; intrinsic case study, instrumental case study, and collective case study. The first involves that the researcher has a strong personal interest in the particular case. The instrumental case study refers to the study of a particular case in-depth in order to give insight into a particular issue or to refine a theory. The last, is an extended instrumental case study where multiple cases are examined in order to learn more about the phenomenon, population or general condition. For this research an instrumental case study was adopted because it allows to insightfully investigate the phenomena and issues of this under-researched topic in-depth.

As is common in supplier-based tourism distribution research (Buhalis, 2000; Schott, 2007; Yamamoto & Gill, 2002) semi-structured interviews were employed to combine a set of questions with the freedom for respondents to expand on certain points. A combination of purposive and snowball sampling techniques were employed to recruit respondents, who were selected based on their level of engagement with BCCBT. Consistent with Simpson's (2008) identification of key stakeholders in CBT the community, private sector (travel agencies, tour operators, etc), NGOs and relevant government authorities were interviewed for this research;

additionally, Cambodian CBT experts were also included to benefit from their CBT expertise. Respondents were initially contacted via telephone and further details about the research project were subsequently sent via email. Due to the focus on distribution channels the participants were classified as follows:

- *Supplier (community)*: Three of the thirteen BCCBT members were invited to participate in the interviews. They were selected because they are the most familiar with the CBT's distribution channels and related issues.
- *Intermediaries (TOs, TAs, sending-NGOs)*: According to the 2014 Banteay Chhmar community annual report, there were 37 companies and sending-NGOs working with the BCCBT. The companies consisted predominantly of tour operators (TOs) but also included some travel agents (TAs); the roles of tour operators (TOs) and travel agents (TAs) overlap at times and, although a number of TOs also perform roles as TAs, they were classified as TOs. From this list 15 companies were selected based on three selection criteria (recommendation from community and NGO, level of engagement with the community, volume of business through intermediary) and subsequently approached. Eleven intermediaries agreed to participate in the interviews. The research participants are managers or owners of the selected companies.
- *Supporting Partners*:
 - *NGO*: Global Heritage Fund (GHF) is an important donor and developmental partner. Thus, a representative from GHF was interviewed because the person is a long-standing supporter and advisor to the community.
 - *Tourism authorities*: Government plays an important role in policy design and guidance for the tourism industry in Cambodia. As a result a representative from the provincial Department of Tourism and the Ministry of Tourism are included in the study.

- *CBT experts:* Three experts in CBT are also included in the research as they are intimately familiar with the specifics of CBT as a tourism product. They were selected based on their expertise of CBT and the Cambodian context.

The semi-structured interviews contained a list of questions developed from the literature. They were asked in the sequence outlined in the next sentence, but there was flexibility to allow the respondent to follow a less structured path. The questions were organized into topics and initially covered target markets, marketing strategies and marketing plan, followed by questions about the distribution channels being used, factors influencing the observed structure, relationships and partnerships among channels members, and finally overall market trends. The interviews were conducted by one researcher who speaks both Khmer and English and were digitally recorded. As summarized in Table 1 the interviews ranged from 45 minutes to one and a half hours depending on the complexity of the respondent's relationship with Distribution Channels for BCCBT. The interviews were conducted in three locations – the Banteay Chhmar community area, Siem Reap province, Phnom Penh, as well as via Skype video call to accommodate offshore intermediaries. Most interviews were conducted in Khmer and the remainder in English. To ensure accuracy during the translation process assistance was sought from a tourism expert proficient in translating Khmer to English. Furthermore, transcripts were sent back to the respondent for review and verification.

Table 1. Characteristics of the interview participants

Respondents	Number of participants	Location of the interviews	Duration of the interview
Community members	3	Community	Approx. 1 hour
NGO	1	Community	1.20 hours
Key informants	3	PP	1-1.5 hours
Tourism Authorities	3	PP, BMC, SR	45 minutes – 1 hour
Intermediaries	11	SR, PP	Approx. 1 hour

Note: PP: Phnom Penh, BMC: Banteay Meanchey Province, SR: Siem Reap Province

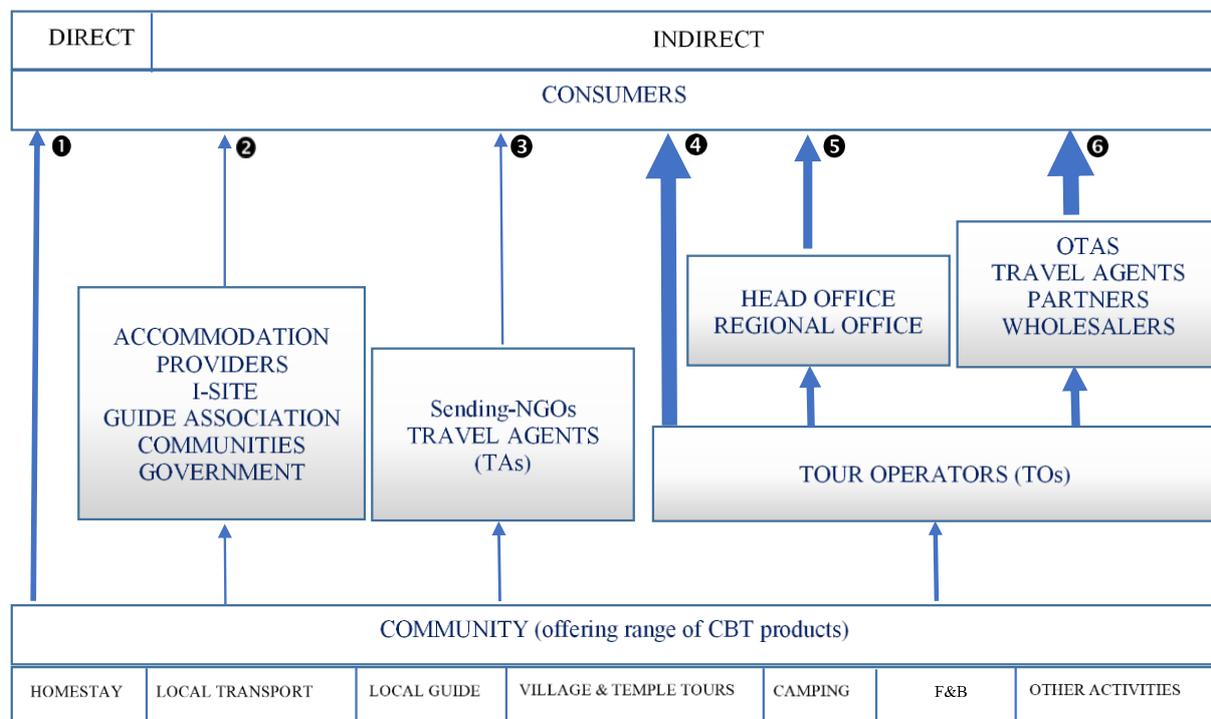
The analysis of the transcripts enlisted thematic analysis (Braun & Clarke, 2006) to identify and group interview content in a meaningful context. Using an approach driven by a combination of inductive-deductive reasoning (Fereday & Muir-Cochrane, 2006) themes and subthemes were developed by reading the data in an active way by searching for meanings and patterns (Braun & Clarke, 2006). During the coding process established distribution channel frameworks were considered thus adding existing knowledge to the inductive coding process (Fereday & Muir-Cochrane, 2006). Additionally the researcher regularly compared themes with fieldwork notes and observations for cross referencing purposes. The themes and subthemes were subsequently aligned with the research aims with a core focus on: structure of marketing and booking and payment channels as well as factors influencing channel structure. Ethical approval was granted from the Human Ethic Committee of the university; to retain confidentiality respondents are referred to only in terms of the respondent group they belong to, such as Tour Operators (TOs) or NGOs.

Findings

Following other studies of tourism distribution channels (Pearce, Tan and Schott, 2007) the findings section will initially establish the distribution channel structures for BCCBT, both from a marketing and booking and payment perspective, before the factors influencing the observed structures are analysed. This will allow for a systematic analysis that crystallises the particular dynamics and ultimately the strengths and weaknesses of Bancheay Chhmar CBT; which will in turn have implications for other CBTs in South East Asia.

Developed from the responses to three questions dealing with marketing Figure 3 graphically summarises the marketing channels structure ranging from low level of complexity on the left to increasing level of complexity on the right. The thickness of the arrows indicates the channels' frequency of use as reported by all respondents.

Figure 3: BCCBT Marketing Channels Structure



Marketing Channels Structure

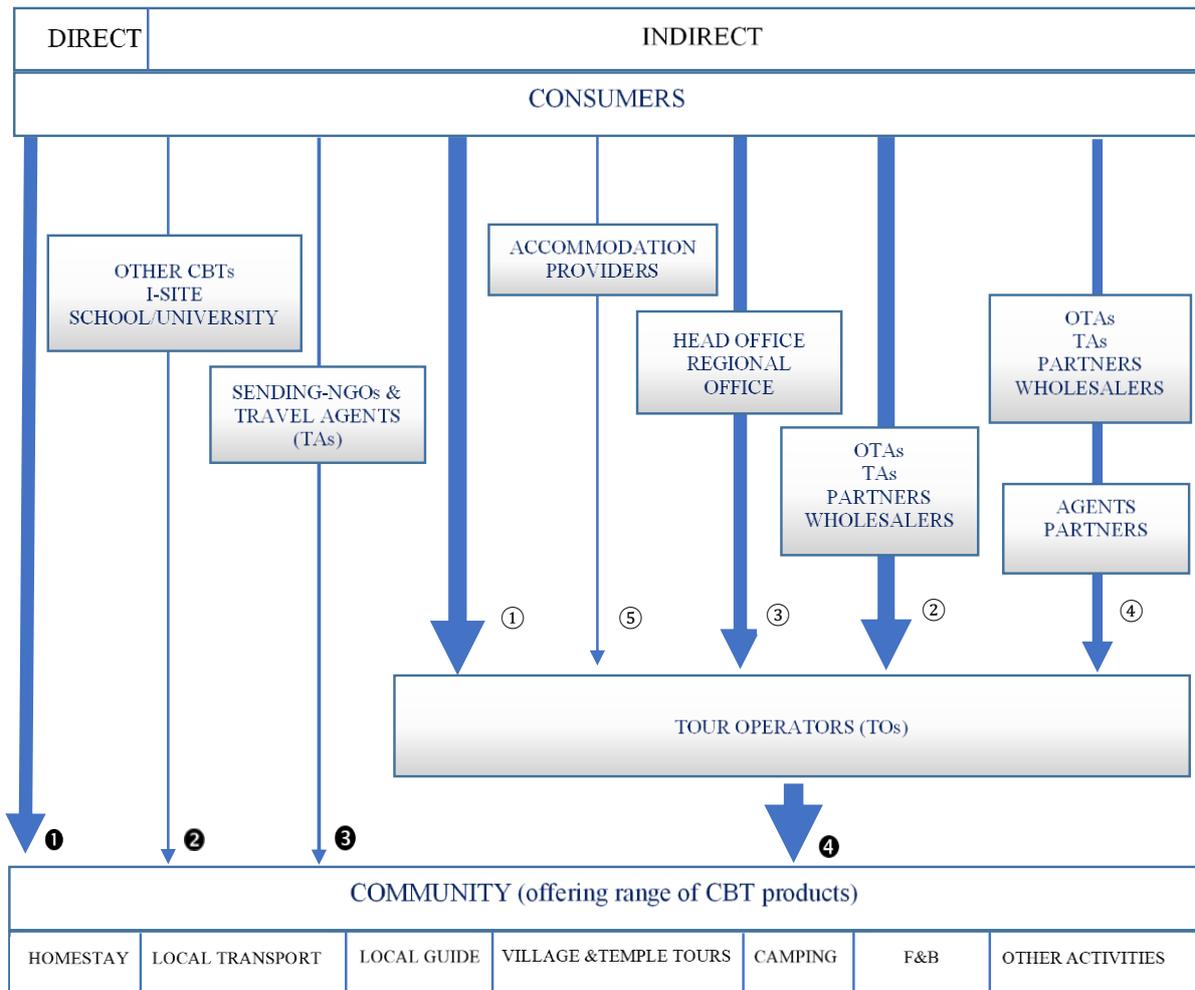
Marketing channel (MC) 1 highlights that the community uses a direct channel as well as a variety of indirect MCs (MCs 2-6) to reach its market both locally and offshore. The direct MC channel is crucial for the community as it enables them to provide more detail about their products or services (Schott, 2007) and allows them to respond to visitors' enquires effectively and in a timely manner. However, the extent to which a community invests in such activities was reported to be constrained by capacity issues and funding. Although it is not of frequent use, MC2 highlights that local channel members play a role in providing product information either via word-of-mouth (WoM), as also observed by Stuart et al. (2005) in rural New Zealand, and/or by allocating a small space to display brochures or other marketing materials. These local relationships are largely based on informal relationships and a willingness to support this community project. MC3 is used similarly infrequently and includes a small group of TAs that work directly with the community as well as offshore sending-NGOs; these NGOs are not motivated by profit but instead see it as development support for the community.

The frequent use of MC4 illustrates that the tour operators (TOs) are more active in marketing and promotion of their own packages, which includes the CBT products, rather than the CBT per se. Although the community acknowledged during the interviews that TOs are important marketing partners it pays little attention to this marketing channel as illustrated by the thin arrow connecting the two. While some TOs are locally based and operate directly with the consumer (MC4), many others operate through head or regional offices (MC5) or circulate product information through TO's offshore agents, partners, online travel agents (OTAs) and/or other wholesalers (MC6). In the two latter cases the local TOs are only responsible for collecting and updating information while the marketing tasks are largely the responsibility of their head or regional office, offshore partners or agents.

Booking and Payment Channels Structure

Following the same analysis strategy as above, Figure 4 graphically summarises the booking and payment channels (BPC) structure, which is broadly consistent with Pearce and Tan's (2004) study. Figure 4 illustrates that direct booking and payment constitutes an important part of distribution channels for BCCBT (BPCI). The community website, word-of-mouth and printed materials play an important role in promoting this direct channel. Most direct visitors arrange their trip to the community well in advance by booking via email, and in a small number of cases with a phone call; unsurprisingly due to the community's remoteness only few visitors are walk-ins.

Figure 4: BCCBT Booking and Payment Channels Structure



A number of local entities (BPC2) also sell the CBT product, however, unlike in Schott's (2007) adventure tourism study only few visitors make use of this channel. BPC3 depicts indirect international channels through overseas agents, which include overseas TAs as well as well sending-NGOs which act as intermediaries. Although the volume of bookings through this channel is small the visitors that are received via the sending-NGOs are highly valued by the community because they are often interested in volunteering and stay longer than visitors through other channels. BPC4 is reported to be the most important channel; particularly for international tourists. This echoes Pearce and Tan's (2004) New Zealand study which emphasised the importance of working with TOs for bringing international visitors to culture

and heritage products Noticeably, there are five sub-channels which will be discussed briefly by referring to the associated number starting with the largest volume. The most significant channel is direct between the TO and the consumer (Sub-channel 1). Consistent with the direct marketing effort, many tour companies are able to sell their CBT packages directly to the visitors; this is predominantly via their website. Most TOs also build partnerships with offshore travel companies (Sub-channel 2) such as travel agents, online travel agents, chain-based partners, and wholesalers. Some TOs maintain flexible partnership with their overseas partners, which tend to be sales volume dependent, while others reported strong and committed business partnerships. These partnerships were based on the condition that information provision, bundling & packaging, and booking & payment are required to go through their partners. Booking and payment via the TOs' parent company's head office was reported to be of mid-scale importance (Sub-channel 3). Although multiple layers of commission/mark-up can render the CBT products uncompetitive the presence of multiple channel members (Sub-channel 4) was also reported and identified as not insignificant in overcoming the great cultural and geographical distance between demand and supply. Finally, local channels members such as accommodation providers (Sub-channel 5) play only a minimal role.

Factors influencing CBT Distribution Channels

To allow for a nuanced analysis of the influencing factors Table 2 distinguishes between the three core respondent groups (the CBT experts were placed in the supporting partner category) and the level of influence reported for each factor. In total five key factors were identified during the thematic analysis: commissionable product, product characteristics and market access, information communication technology, partnership issues and community capacity. Each of these factors will be discussed in turn and supported by quotes to add richness and context.

Table 2. Factors influencing CBT Distribution Channels Structure

Factors influencing CBT distribution channels	Community	Intermediaries	Supporting partners (Government, NGO, Experts)
• <i>Commissionable product</i>	-	✓✓✓	-
• <i>Products characteristics and market access</i>	✓✓	✓✓	✓
• <i>Information communication technology (ICT)</i>	✓✓	✓✓✓	✓
• <i>Partnership issues</i>	✓✓	✓✓✓	✓
• <i>Community capacity</i>	✓✓✓	✓✓	✓✓

Note: ✓ Indicates minor, ✓✓ indicates medium and ✓✓✓ indicates strong influence of the factors on the DCCBT, while - indicates that it is not applicable in these groups

Commissionable Product

BCCBT does not offer commission and as is the case with most CBTs in Cambodia the prices remain the same even when a channel member bulk buys CBT products. This practice is consistent with many rural operators in Stuart et al.'s (2005) study who felt that asking for a commission is “bad business” (p.246) and who instead had extensive referral systems. In BCCBT’s case this approach is largely due to the fact that a fixed priced for each product was agreed during an extensive consultation process when the CBT was developed. A NGO working in the community highlights this point,

“intermediaries may need to prepare a new price for their packages or services without taking commission from community. They cannot force community to set certain prices for products; consequently, they have to negotiate with visitors for their profits” (NGO)

As outlined earlier the majority of bookings are via TOs, for whom commissions/mark-ups secure their existence. As was also outlined there are five sub-channels used by the TOs, including direct and multi layered indirect channels; each of which has different implications for commission/markup. The commissions offered, which were reported to vary between 10% and 25%, depended on volume of product sold and, very importantly, the relationship between each channel member (Ford, Wang, & Vestal, 2012). Some of the larger TOs tend to have a more systematic and formal commission system where a fixed percentage is offered based on earlier agreements with other channel members. They tend to be very protective of these agreements even if they are contacted by other agents or directly by visitors. Other TOs have systems that are open to variation depending on the popularity and variety of products offered. The interviews revealed that it is dependent on company policy whether TOs and other intermediaries have a commission system, mark-up or both. Arguably the commission/markup applied by TOs is one of the key reasons why their bookings outstrip direct bookings to the CBT; the sales incentive is increased and via this income resources are available to provide marketing as well as booking and payment pathways.

Product Characteristics and Market Access

CBT products and services are characterised by a collective business entity, where locals work together to offer different components of the products, all of which are brought together as a CBT package. Often CBTs are located in remote destinations (Harrison & Schipani, 2007) and their products are consequently less well-known. As observed in other studies of small and medium sized tourism businesses (Bastakis, Buhalis, & Butler, 2004) determining how product awareness can be raised abroad and how the products can best be sold is a critical issue for these communities.

“There are many people asking me why I bring them (visitors) there (community). I just answer that there are many thing to do and see. Some locals simply do not know anything about Banteay Chhmar, let alone international visitors” (TO)

Several TOs reported that CBT products are vital components in their product range and that they aggressively highlight CBTs in the marketing campaigns for South East Asian regional packages, mainly with Viet Nam and Laos. However, some TOs include CBT products simply as part of their product innovation strategies. For example when expanding into new markets they try to diversify their products in collaboration with offshore partners to attract more clients.

“We have to find something new and innovative to include in the packages. However, it is based on our partner as well. If they want to expand to CBT market, we will include that accordingly” (TO)

Market access is also seen as important and strongly associated with a number of challenges, such as, distance from the market, insufficient supporting tourism infrastructures, and lack of community initiative. As for many other CBT projects, for Banteay Chhmar the degree of remoteness is reported as a major issue. The remoteness restricts direct contact with visitors and renders transportation to the community complicated, time-consuming and costly because of a lack of public transport infrastructure.

“The connecting transportation to Banteay Chhmar community is very complex. When they (visitors) reach provincial town, they have to change to another local taxi stand (Phsar Themy), before catching the direct taxi. As a stranger to the new location, they find this quite confusing, especially when they do not speak the local

language... It costs between USD 25 and 30 for pick up taxi from Sisophon (provincial town). It is difficult for foreign visitors” (sending-NGO)

To overcome these challenges both formal and informal partnerships with TOs are important for the community as they fill the gap in product awareness and marketing; but they also play an important role in the sale of the CBT products. TOs include CBT products in a series of packages and promote them to a wide range of markets through regional and offshore partners. However, most TO interviewees said that developing a relationship with the community was challenging because the community was not proactive. Contrary to most other tourism distribution relationships TOs had to approach the community and even then the community often failed to provide adequate information, which creates a serious tension in the relationship. As the TOs have a lot of choice in products to sell they need to be highly motivated to maintain such a one-sided relationship.

“CBT is not well-known. When we include it in the itinerary, we have to put the description about community, and how the tourist’s money could help community. ...there are many hotels contact me because they want me to sell their products, yet community does not do this. I have to contact them for information. They do not contact and give me the updated information... I think it is the main problem that we do not get the information from them. I think that they should have a marketing manager and update the information with me every month, so I will keep an eye on it and promote it more” (TO)

Information and Communication Technology (ICT)

BCCBT currently uses websites, direct e-mail marketing, social media, and e-newsletters for direct marketing. For independent travellers, the community website is perceived as the

primary source of information which is complemented by email; these two ICT-based channels represent an important development in the community's ability to direct market as exemplified in the quote from a community member.

“It (website) is crucial for us to share information and promote our products globally. All visitors can get important details from it... Mostly, they (independent traveller) check community website to arrange their trip and they book through email...it would be very challenging for both community and visitors if there are not these online options” (Community member)

Moreover, email is the main communication tool for the community when dealing with the TOs and other offshore agents. ICT was also discussed as a crucial factor by the TOs because of its ability to enhance direct distribution channels between them and the consumers, thus allowing TOs to keep product prices at a competitive rate. However, some TOs also appreciated ICT's role in selling their packages through online travel agencies (OTAs) because of the global reach they offer.

“Online bookings through OTA is very prevalent now and they are very important because they have huge network. When we upload information, customers will find us worldwide” (TO)

Some TOs make diverse use of ICT, including for accessing visitor databases, as a communication tool amongst their travel partners, and for booking and confirming availability of products and services. Despite the opportunities offered by ICT to use direct channels for these tasks some local TOs nevertheless use other intermediaries or online partners. As previously observed in the context of small hotels in Sri Lanka (Abeysekara, 2017), this decision is mainly due to the perception that large OTAs are regarded as more trustworthy by consumers.

Partnership Issues

Respondents not only from TOs but also the community perceive partnership as a major factor in how products are distributed and why certain channels are chosen (Ford et al., 2012). There is an interwoven connection with other factors, such as key factors previously discussed (product characteristics), as well as less significant factors that could not be discussed (demand features, product cost, and the characteristics of the suppliers and operators). Given the fact that approximately 70% of all visitors approach BCCTB through TOs there is no doubt that they are a pivotal part of the distribution system. The TO-community partnership and how the TOs deal with other intermediaries in the market place explains to a large extent how such partnerships affect product distribution. Currently, there are approximately 40 travel companies sending visitors to BCCTB. A few of them have developed a serious relationship with the community by means of a memorandum of understand (MoU), year-end appraisals and feedback meetings. However, many others have an informal relationship with the community. The formal partners are likely to send visitors more regularly to the community while informal partners tend to send a lesser number of visitors in a more ad-hoc fashion.

As previously outlined, the community does not offer commission, thus TOs need to mark-up the price and include this in their package before making a direct sale or sending the package to their offshore partners. The level of mark-up is beyond the community's control and they do not interfere in their partners' pricing decisions; this ultimately means that the community neither has influence nor knowledge of the final product price. However, due to the nature of the CBT products, partners who sell CBT products are generally characterised as not solely profit-oriented. The majority of TOs try to support the CBT by including details about the CBT concept and community life in their package information, newsletters or websites.

Importantly they also educate visitors about cultural etiquette in the community, which is crucial for any sustainability-focused enterprise (Budeanu, 2007), such as CBT.

“we put detailed information about community in the package including how to take bath, how to stay well with community, code of conduct and so on...and our partners or agents also include such information in their packages as well” (TO)

The community's non-profit oriented partners, such as the sending-NGOs tend to send their trip participants directly to the community. These visitors are likely to stay longer and join the volunteering activities in the community while learning about the community and local culture. This suggests that these partners have developed a more sustainability-focused relationship with the community. Such relationships are clearly very important for the community as they provide loyalty and ongoing willingness by the NGOs to provide support to the community. A critical factor in the community-private sector partnership is the proactivity and commitment from the private sector partners. All private sector respondents indicated that they approached the community first before a business relationship developed and that they had to actively seek information about the community before they could conduct an on-site appraisal to subsequently develop packages for their regional and offshore partners. While this relationship is clearly important for BCCBT to reach a wide audience it is unusual for TOs to have to take the initiative, which leaves BCCBT in a vulnerable position if a TO changes their strategy or market focus. Ultimately, the reasons why TOs choose to follow certain channels and not others are associated with the company's policies and protectionism. Some TOs have strong relationships with local and/or overseas partners and such relationships determine the way products are distributed; usually all of the involved channel members trust and support one another.

“If there are some companies or visitors contact us directly, we do not accept that. We will refer to our partners because we are afraid that our partners may lose the commission” (TO)

Community Capacity

Even though BCCBT has witnessed a visitor growth of 100% over the space of two years, community capacity to run the CBT as a commercial enterprise continues to be a significant challenge.

“Their (community) capacity is still limited... They do not know how to sell the products effectively...it is their challenge” (NGO)

Most of the operational costs still largely rely on NGO support, and although there is evidence that the community will be economically sustainable in the coming years there are currently insufficient financial resources to optimize distribution. Consistent with other small tourism businesses the process of selecting the best distribution channels in itself also requires skilled human resources (Abeysekara, 2017; Bastakis et al, 2012). The community’s current abilities suggests that more skills development is needed to keep pace with the increasing significance of ICT in the distribution of CBT products.

“We have limited skills in the areas of English language, information update on Website, marketing, how to use email and keeping track of bookings...we are not strong enough to communicate with tourists” (Community member)

Capacity concerns are echoed by the TOs who are also apprehensive about the community’s ability to deliver the product once the tourists have arrived in the community; particularly in view of client expectations.

“we have to have our guide because community guides do not have broad idea to link to other places...they should continue to create new products and keep us informed... Sometime, some of their products do not reach our requirements...so we need to negotiate with them in order to minimize the gaps” (TO)

Interestingly, some TOs do not believe community capacity to be a drawback. They acknowledge that the community is limited in what it can provide but emphasise that this challenge can be negotiated by clearly explaining the situation to all channel members as well as to potential visitors. The concurrent perception that the lack of commercial savviness by BCCBT could be seen as enhancing the authenticity in the eyes of the CBT tourists (Dolezal, 2011) is also worth mentioning here.

“I think there is no problem with their capacity to sell the products. I told visitors that our trip is not about travelling to a place where five-star service standard are served” (TO)

This perspective provides an important counter point to the concerns about lacking efficiency and professionalism in that a CBT project is ultimately a niche experience that embraces tourists’ interests in learning about other cultures, their quotidian lives and value systems.

Discussion

Consistent with many tourism products in the cultural and heritage sector (Pearce & Tan, 2004) BCCBT’s distribution structure consists of considerable channel diversity, including direct as well as several types of indirect channels. Through the provision of a variety of indirect channels as well as other important marketing and payment services TOs add significant value

to the distribution of the CBT product, the sale of which has limited appeal for other/larger intermediaries because of BCCBT's no-commission policy. Because of the lack of education, training, and experience in promoting, selling and offering a tourism product the community valued the role of the TOs highly as they fill the capacity gap that exists within the community. This strong support and appreciation of the role of TOs is often not mirrored in other contexts, such as Greece (Buhalis, 2000), where both the high commission demands and the power of TOs are leading to conflict.

Despite the broad commonalities regarding the structure of BCCBT's distribution system a more nuanced view highlights differences between the CBT product and other attractions and activity products such as wine tourism (Liu, 2012), safari tourism (Mkumbo, 2010), and adventure tourism (Schott, 2007). CBT products are characterized by the combination of micro and small family-based ventures. This means that the 'service providers' are essentially local people who live in the vicinity of the key attraction, who often have other (competing) income sources at the same time, and only low levels of tourism-related training. Therefore, it is not surprising that CBT products and services are highly fragmented without a consistent approach or quality standard because they are ultimately supply-oriented (Goodwin & Santilli, 2009). Additionally, CBTs set themselves apart from other tourism attractions and activities due to severe access challenges; CBTs are often located in remote areas which renders transportation to the community both adventurous and costly (Zapata et al., 2011; Harrison & Schipani, 2007).

Consistent with Pearce and Tan (2004) who found that the distribution strategy's level of sophistication is associated with the size of the business, BCCBT's structure was found to be similarly complex as a medium sized culture/heritage focused tourism business. Interestingly this finding also applied to the intermediaries working with BCCBT. Small specialized TOs

tended to use direct or very short channels, while large TOs were likely to use more complex, multi-layer distribution channels involving other intermediaries such as offshore travel agents, wholesalers or OTAs. Due to their differing audiences small, medium-sized as well as larger TOs were all found to play important roles despite the differing complexity of their distribution systems.

As highlighted in Table 1 a range of factors were identified to influence BCCBT's distribution structure. Similar to previous research (Pearce & Tan, 2004; Liu, 2012) *commission-related factors* were found to have profound effects, however, unlike in Pearce and Tan's (2004) study the local channels members are much less important for BCCBT than the intermediaries further afield; this is largely due local intermediaries lacking detailed knowledge of the niche product offered by BCCBT. The TOs mitigate the lack of commission by marking up the product for their own direct channels and subsequently offering a commission to their intermediaries. Consistent with other studies (Reid & Pearce, 2008) the commission or mark-up rate offered by the TOs was between 10% and 25% and dependent on the relationship between the TOs and their offshore agents.

The influencing factor which crystallises the specific context of CBT most overtly is *product characteristics and market access* as it highlights the significant influence of BCCBT's geographical remoteness and inadequate supporting tourism infrastructure; characteristics mirrored by CBT enterprises in neighbouring Laos (Harrison & Schipani, 2007) and likely throughout other parts of South East Asia. Additionally, the community's limited understanding of market expectations was identified by several stakeholders as a significant challenge. All these factors have a strong influence on distribution channels and help to explain the strong presence of TOs in the BCCBT's distribution structure. TOs bridge the gap between

the community and the market in all three contexts; although to varying degrees. The TOs most commonly fill the geographical gap through marketing/promotion and payment gateways; education about the CBT concept and conduct in the village is provided with lessening frequency.

However, direct channels were also important for BCCBT and this was predominantly facilitated by the recently installed Internet connection. The community indicated that *Information and Communication Technology* played an important role in that the Internet allowed the community to reach a wider market through online marketing. Although ICT helps to facilitate and increase choice for consumers (Yin, 2013) its dynamic nature also presents challenges for BCCBT because its members are technological novices that do not have adequate skills necessary to maintain current or even adopt new technology. Any technological tasks such as website development are supported by an expat volunteer, which presents a risk as there is no contingency if that person moves on.

As has been observed in other contexts (Liu, 2012; Novelli & Gebhardt, 2007) this study found *capacity constraints* to have a significant impact on distribution channels. On the one hand BCCBT has limited skills capacity in terms of marketing, management, general business operation, and technology. While on the other its physical capacity is greater than many medium-sized businesses because it combines different service providers under the CBT umbrella. In addition, BCCBT does not work alone in hosting group tours because TOs provide support which help overcome capacity issues in managing tourists. As echoed in earlier studies of cultural and heritage sites (Middleton, 1997; Pearce & Tan, 2004) the key people in BCCBT are skilful in conservation and temple restoration, yet many of them have very limited tourism business expertise which has implications for BCCBT's economic sustainability.

One of the key challenges is that neither the community nor supporting partners like NGOs pay consistent attention to marketing. Due to the limited financial resources of the community, low-cost, highly effective marketing strategies are crucial. Currently most marketing-related activities are done intermittently on the basis of available resources. However, without a marketing plan it is challenging to target particular groups of visitors (Buhalis, 2000). As a result the community tries to attract wider markets in an ad hoc manner, potentially wasting valuable resources in attempting to attract markets to which their products may not appeal. Given that the Internet is the most important of the direct channels, the community needs to develop the skills to maintain the website and use email proficiently without relying on external parties. Email marketing to people who have visited the community can aid in promoting the direct online channel, not just for repeat visitation but also for friends and relatives through WOM and electronic word-of-mouth (eWOM) (Litvin, Goldsmith, & Pan, 2008). In addition to enabling direct bookings online channels are also valuable for providing accurate product education (Schott, 2007) and to ensure that visitors' expectations are realistic and consistent with the community's values. It is also clear that despite the rapidly increasing importance of eWOM (Litvin et al., 2008), this medium is currently underutilised by BCCBT and that the community could encourage greater use of social media to compensate for the current lack of ICT expertise. This could include encouraging or sponsoring bloggers to write about the community, which has been found to be effective by Schmallegger and Carson (2008), and encouraging visitors to review their experience through TripAdvisor and other social media sites (Buhalis & Law, 2008).

As highlighted earlier there is very little booking activity from local channel members, such as accommodation providers, souvenir shops, and food and beverage outlets. This is counter to

Schott's (2007) findings in the context of adventure tourism where local channel members were considered very important. The research identified the reason for this to be a lack of awareness about the community and its CBT products. Following Williams and Richter's (2002) recommendations for indigenous tourism development in remote parts of Canada, BCCBT would be well-advised to organize familiarization trips, not just for local channel partners but also other Cambodian CBTs to encourage referral. Although the channel between the community and sending-NGOs represents only a small share of visitors it is considered valuable by the community because NGO-facilitated visitors tend to stay comparatively longer and to spend more. Additionally, they are reported to participate in volunteer activities. Although volunteer tourism contributions can be negative in a number of ways (Guttentag, 2009) the community considered them as predominantly beneficial; fostering more relationships with like-minded sending-NGOs, then is likely to prove beneficial for BCCBT in terms of economic as well as socio-cultural contexts.

As was demonstrated in Figure 4, TOs represent the biggest share of the distribution mix and volume for BCCBT. Although relying on TOs may lead to an over-dependency in the long term, in the short term a strong TO presence is likely to benefit BCCBT because of the many benefits that TOs provide in augmenting the CBT product through packaging and by incentivising its sale through the offer of commissions. As recommended by Williams and Richter (2002), community-initiated communication and ongoing product updates are likely to be of great importance to maintaining strong relationships with TOs. It also appears timely for the community to consider a change in strategy by offering commission; this may be uncommon for CBTs but could prove pivotal to its economic sustainability. Commission has been identified as a critical factor in the distribution of tourism products by Pearce and Tan

(2006), who suggest that bundling of products can mitigate small commissions earned if the prices of individual tourism products are modest.

Conversely government agencies should stimulate CBT projects by providing key community members with training in both the principles and relevant skills for marketing, ICT maintenance and use, and service delivery. Although the conservation goals are understandably important to the local NGOs more attention needs to also be paid by these agencies to support the development of business and operation skills so that CBTs can obtain the capacity to deal with markets and channels member effectively without external support.

Along with the many valuable insights offered by this research some limitations need to also be acknowledged. Namely the lack of demand perspectives needs to be considered when interpreting the findings. Additionally overseas partners are estimated to be underrepresented in this research due to challenges in identifying and then contacting them.

Conclusions

This paper's contribution lies in offering a detailed and nuanced insight into the neglected field of distribution channels for CBT. By examining the case of a culture and heritage focused CBT enterprise in Cambodia it provided a multi-stakeholder perspective into the CBT's channel structure and underlying factors. Because many CBTs in Cambodia and beyond share key characteristics with BCCBT the findings and recommendations discussed above are likely to have relevance for other CBTs, including those that are environmentally focused. In terms of further research several strands present themselves. For instance, a thorough investigation of the demand perspective is needed. To this end two main options are available: researching tourists at the destination (Pearce & Schott, 2005) or consulting potential tourists at the origin

(Pearce & Schott, 2011) about information search and booking for CBT. Alternatively different research lenses that are likely to yield other insights could be applied, such as a collaborative domain-level perspective (Jamal & Getz, 1995) or Appreciative Inquiry (Nyaupane & Poudel, 2012).

Although some learnings can be taken for other types of CBT and other countries a comparative analysis between the distribution structures of a CBT in a developed and developing country would be revealing in teasing out the significance of contextual and structural factors. Future studies should also include an in-depth investigation of channel performance (Huang, Chen, & Wu, 2009) to ensure strategic and effective use of the (limited) human and financial resources; thus contributing to the economic sustainability of this important tourism sector. As differences in visitor markets were not explored it would also be interesting to examine differences in information and booking preferences for CBT across several international markets (Stangl, Inversini, & Schegg, 2016) with a particular focus on the differences between the traditional Western markets for CBT and the rapidly developing Eastern markets.

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Table 1. Characteristics of the interview participants

Respondents	Number of participants	Location of the interviews	Duration of the interview
Community members	3	Community	Approx. 1 hour
NGO	1	Community	1.20 hours
Key informants	3	PP	1-1.5 hours
Tourism Authorities	3	PP, BMC, SR	45 minutes – 1 hour
Intermediaries	11	SR, PP	Approx. 1 hour

Note: PP: Phnom Penh, BMC: Banteay Meanchey Province, SR: Siem Reap Province

Table 2. Factors influencing CBT Distribution Channels Structure

Factors influencing CBT distribution channels	Community	Intermediaries (Tour Operators, Travel Agents, sending-NGOs)	Supporting partners (Government, NGO, Experts)
• <i>Commissionable product</i>	-	✓✓✓	-
• <i>Products characteristics and market access</i>	✓✓	✓✓	✓
• <i>Information communication technology</i>	✓✓	✓✓✓	✓
• <i>Partnership issues</i>	✓✓	✓✓✓	✓
• <i>Community capacity</i>	✓✓✓	✓✓	✓✓

Note: ✓ Indicates minor, ✓✓ indicates medium and ✓✓✓ indicates strong influence of the factor on the DC of BCCBT, while - indicates that it is not applicable to these groups

List of Figure Captions

Figure 1. Benefits of Community-Based Tourism

Source: Adapted from Simpson (2008)

Figure 2. Distribution channels for cultural and heritage attractions in New Zealand

Source: Pearce and Tan (2004)

Figure 3. Marketing Channels Structure

Figure 4. Booking and Payment Channels Structure