

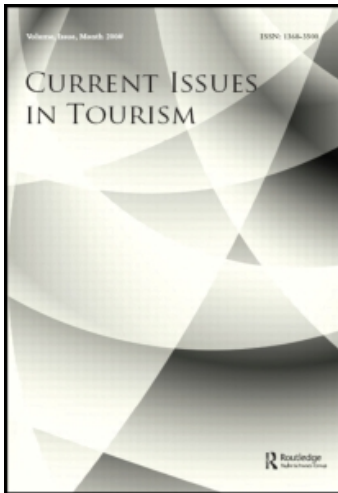
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Tourism and Poverty Alleviation: An Integrative Research Framework

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Tourism and Poverty Alleviation: An Integrative Research Framework

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The past decade has seen an upsurge of interest from the governments and development organisations in a tourism-based approach to poverty alleviation. More specifically, poverty alleviation has been established as a major priority within the United Nations World Tourism Organisation (UNWTO) itself, as is evidenced by the launching of the concept of ST-EP (Sustainable Tourism as an effective tool for Eliminating Poverty). In contrast, the implications of tourism for poverty alleviation have been largely neglected by the tourism academic community. Relevant research to date is fragmented, limited in scope, and lacks a consistent methodological development. To address these deficiencies, this paper presents an integrative research framework, which synthesises multiple perspectives and can be used as an overarching guideline to stimulate and guide other future enquiries on tourism and poverty alleviation. Towards this end, a number of research needs and opportunities have also been identified and suggested along with the presentation of the framework.

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Keywords: tourism development, poverty alleviation, research framework, stakeholders, Third World

Introduction

Although the economic significance of tourism for developing countries is long established (UNWTO & UNCTAD, 2001), noticeably in generating foreign exchange earnings, attracting international investment, increasing tax revenues and creating new jobs, it is not until recently that tourism has begun to be exalted as a powerful weapon to attack poverty. Dated back to the late 1990s, the Pro-Poor Tourism Partnership in the United Kingdom, a collaborative research initiative of the International Center for Responsible Tourism (ICRT), the International Institute for the Environment and Development (IIED) and the Overseas Development Institute (ODI), has been committed to investigating the ways to tap the potential of tourism in poverty alleviation and is responsible for most of the early research and documentation (Ashley *et al.*, 2001). Inspired by the vision and innovative work of the Pro-Poor Tourism Partnership, UNWTO (2002, 2004a) launched the Sustainable Tourism

for Eliminating Poverty programme (hereafter ST-EP),¹ aiming to promote socially, economically and ecologically sustainable tourism as a gateway to development and reduction of poverty among the world's least developed countries. Recent years have also witnessed a wide range of large-scale, tourism-based development projects around the world, for example in Vietnam (UNWTO, 2004b), Nepal (MoCTCA, 2001) and China (CNTA, 2003).

The confluence of tourism and poverty, previously two separate domains (Bowden, 2005), reflects an essential change in the philosophy of tourism development and poverty alleviation, which is illustrated by Figure 1. Traditionally, regional economic growth is predominantly set as the premier target of local tourism development, while poverty alleviation is either considered a sub-goal or a natural outcome of regional economic growth (Ashley *et al.*, 2000; Deloitte & Touche *et al.*, 1999). A commonly held belief is that as long as the whole region gets wealthier, the benefits brought by economic growth will eventually trickle down to the local poor through multiple channels, such as employment, public welfare and family network (Zeng *et al.*, 2005). Thus, policymakers usually pay considerable attention to the expansion of the tourism sector, but much less to the real issue – to what extent tourism development in practice contributes to poverty alleviation (Christie, 2002). As a result, the impact of tourism on poverty alleviation has been indirect and thus non-phenomenal. In contrast, contemporary approaches, for example pro-poor tourism and ST-EP, aim to establish a direct link between tourism and poverty alleviation and emphasise the voices and needs of the poor in tourism development (Ashley *et al.*, 2001; UNWTO, 2002). The poor become the focus of concern; whether they can reap net benefits from tourism now is the primary criterion for justifying any tourism-based development initiative. Such a new philosophy is believed to greatly enhance the chance of the poor to benefit from tourism.

Despite the potential of tourism as a development tool and the worldwide, mushrooming interest in tourism-based poverty alleviation initiatives, the relationship between tourism and poverty alleviation largely remains *terra incognita* among tourism academics. Until very recently, poverty alleviation and relevant issues have only attracted a small cohort of researchers within tourism, and the existing literature is basically case study driven and oriented to practical aspects.² In addition, related research work was produced in a

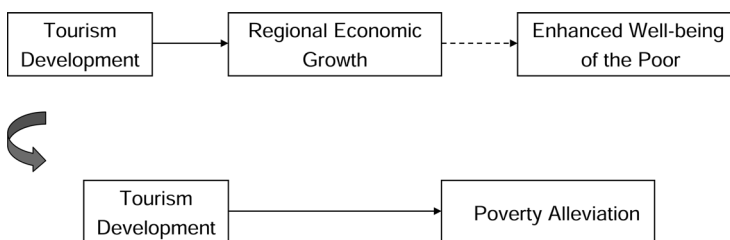


Figure 1 A change in the philosophy regarding tourism and poverty alleviation

diversity of sources, considerably in the form of grey literature, thus failing to explicitly contribute to methodological development in this field of research.

The complexity of poverty-related issues may partly account for the sparse attention of tourism researchers paid to poverty alleviation research. Nowadays, poverty not only means inadequate income and human development, but also embraces vulnerability and a lack of voice, power and representation (World Bank, 1990, 2000). Due to the multidimensional nature of poverty, understanding any poverty-related issue is always a challenge as a wide range of interwoven factors, such as economic, sociopolitical and cultural forces, need to be taken into account. In addition, unfamiliarity with the research settings (poverty-stricken areas) and remoteness to the research subjects (poor people) may also deter many researchers, especially those in economically advanced countries, from delving into poverty research. Anyhow, the severe mismatch between research and practice highlights an urgent need for a more systematic, comprehensive and coherent approach to guide the enquiries of this emerging field of research. Despite the practical difficulties in studying poverty as mentioned above, this field is obviously worth greater research efforts given that poverty has become one of the biggest enemies of humankind into the 21st century. The Millennium Development Goals (MDGs) has made a historic pledge to halve the proportion of the world's people whose income is less than one dollar a day by the year 2015 (United Nations, 2000). We believe that tourism, as one of the largest economic drivers in the contemporary world, should and also can play a more active role in achieving such an ambitious goal.

In this study, 'anti-poverty tourism' (APT) will be used as a unifying concept to refer to any tourism development in which poverty alleviation is set as the central or one of the central objectives. To address the deficiencies in the literature as discussed above, this paper aims to provide an integrative research framework on APT, which is intended to serve as a catalyst that can stimulate more future, in-depth investigations in this emerging field of research. A similar approach has been utilised on urban tourism (Pearce, 2001), sport tourism (Hinch & Higham, 2001), wildlife tourism (Reynolds & Braithwaite, 2001), special interest tourism (Trauer, 2006), mountaineering (Pomfret, 2006) and human resource development (Liu & Wall, 2006). The unique value of integrative frameworks lies in their strength in offering 'both a general overview of the field and a means of putting specific studies and problems in context, so as to understand better the existing interrelationships, to develop a sense of direction and common purpose, and to provide more integrated solutions to problems that may arise' (Pearce, 2001: 928). Thus, integrative frameworks are especially useful for the formation and maturing of emerging research topics or fields like APT.

Discussions below are organised as follows. In the next section, the integrative framework that represents a holistic, conceptual understanding of the APT domain will be introduced and explained. The later section is intended to illustrate the usefulness of the integrative framework for analysis, and will identify and suggest a number of research needs and opportunities associated with the framework. The last section will conclude, with some discussions on the managerial implications of the framework.

Conceptualising APT: An Integrative Research Framework

Figure 2 is an illustration of the integrative APT research framework proposed in this paper. Its content and structure arose out of a deliberate, comprehensive consideration of a wide range of related literature (see the references of this section), combined with some of the present authors' personal thoughts and theoretical constructs. An overview of the framework will be presented first, followed by detailed explanation and justification for each of the constituents and their relationships.

The central part of the integrative framework – the ladder, is basically concerned with the process and mechanisms as to how tourism development can contribute to the reduction of poverty. It consists of four levels – 'poverty alleviation', 'determinants', 'APT themes' and 'stakeholders', each of which is further specified as a cluster of several interrelated components. 'Poverty alleviation', being the convergent point of the whole framework, is the essential objective of any development initiative including APT. 'Determinants' in this framework refers to those prerequisites that must be met in order to achieve the objective of poverty alleviation in a sustainable manner. Specifically, three determinants – 'opportunity', 'empowerment' and 'security' have been identified and included on the basis of a review of contemporary development studies and practices. They conjointly represent a highly generalised model to poverty alleviation, and any development effort or approach, to be justified and successful, should address and contribute to at least one of them. The third level of the ladder is a list of three crucial themes that require serious consideration in APT. From a tourism development perspective, it is proposed that to effectively reduce poverty, an impoverished destination needs to build up its competitiveness, ensure adequate local participation and follow the principles of sustainable development; deficiency in any aspect may severely weaken the positive impacts of tourism on the life of the poor. Given the significance of stakeholders in tourism planning, development and management, the framework also includes six salient stakeholder groups as deemed most relevant to APT.

The upper parts on both sides of the ladder address the relationships of APT with other poverty alleviation approaches. Research on this will provide

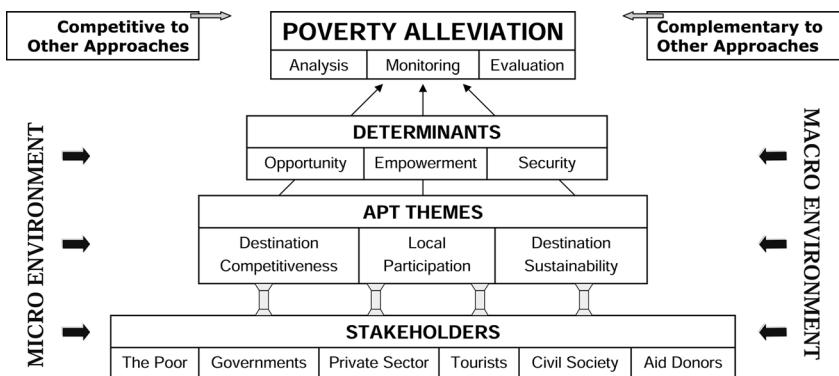


Figure 2 An integrative framework for anti-poverty tourism research

information on the comparative benefits and costs of APT, which can be used as the basis for fitting APT into broader poverty alleviation initiatives. The overhanging parts, namely 'macro environment' and 'micro environment', highlight the facts that tourism is an open system and APT is thus subject to various influences and pressures that arise within and outside the system.

Poverty alleviation and determinants

In accordance with the multidimensional nature of 'poverty', 'poverty alleviation' has also been widely recognised as a multidimensional objective (World Bank, 1990, 2000). That said, understanding both 'poverty' and 'poverty alleviation' is obviously beyond simply tracking economic measures, and inherently requires special treatment by more comprehensive research. This research need has been adequately considered by the integrative framework, which highlights the importance of the research regarding the analysis, monitoring and evaluation of poverty and poverty alleviation. Typically, for this part, the following basic questions will be investigated: (1) What is poverty and who are the poor? (2) What are the root reasons of poverty? (3) How to measure poverty and track the progress towards poverty alleviation? The relevance of these questions to APT research is evident as researchers need to be well-informed on them so that research subjects can be selected, appropriate indicators developed, and the effectiveness of APT monitored and evaluated. Although answers to these basic questions can be directly 'borrowed' from generic poverty studies, there is still a situational need for tourism researchers to adapt the answers to the context of tourism. This is especially true when it comes to the monitoring and evaluation of the particular contributions of tourism to the reduction of poverty. The big challenge is that it is not always easy to differentiate the impacts of tourism from those of other development activities. The recently developed Tourism Satellite Account (TSA) by UNWTO (2001) provides a promising solution in this regard, but only in the economic sense. In addition, TSA only measures the contribution of tourism to the macro economy rather than specifically to a certain social group like the poor. Tracing and mapping tourists' cash flows to the local poor could be another relevant approach in exploring the correlation between tourism and poverty alleviation. However, this approach requires extensive work in data collection and validation, and may be less feasible in large-scale destinations with a diverse economy.

The level of 'determinants' includes three components – 'opportunity', 'empowerment' and 'security', which collectively reflect the guiding principles of contemporary development practices under the leadership of the World Bank (2000).³ 'Opportunity' means the poor must have access to economic opportunity of which they can take advantage to change their destiny. Much research and evidence have demonstrated the ineffectiveness and unsustainability of the traditional, charity-based approach in poverty alleviation (World Bank, 1998). This is mainly because the poor could become overly dependent on donations and lose their motivations to improve their life by themselves. Therefore, nowadays more emphasis has been put on the income generation capacity building of the poor (UNIDO, 2001), in which

economic opportunity plays a significant, incubating role. The second component – ‘empowerment’, is also well entrenched in poverty studies (see PREM, 2002). In the political sense, ‘empowerment’ aims to enhance the capacity of the poor to influence the state and social institutions, and thus strengthen their participation in political processes and local decision making. In the economic sense, it highlights removing the barriers that work against the poor and building their assets to enable them to engage effectively in markets. The poor being socially, economically and politically marginalised, both forms of empowerment represent the essential processes for them to pursue and benefit from any economic opportunity (World Bank, 2000). The third component – ‘security’, is concerned with reducing the vulnerability of the poor to various risks such as ill health, economic shocks and natural disasters. Since poor households have fewer assets and less diversified sources of income to manage any crisis, they could be easily thrown into despair when these adverse impacts happen to them (Dhanani & Islam, 2002). Therefore, simply expanding opportunity and empowerment are insufficient; to consolidate the fruits of poverty alleviation, a social security system specifically for the poor also requires establishing. These three components, each from a distinct angle, have manifested three requisite but supplementary ways to assist the poor. Evidently, to achieve the most desired effect in poverty alleviation, all of the three components should be concurrently strengthened.

The above discussion indicates that the three components under the category of ‘determinants’, as the key conditions for poverty alleviation in the general sense, actually serve as the bridge linking development initiatives and the objective of poverty alleviation. Judging the appropriateness and efficacy of a certain poverty alleviation approach can be as straightforward as to examine whether it contributes to the opportunity, empowerment or/and security of the poor. As an immediate example, the usefulness of tourism development for poverty alleviation can be evaluated by employing these three criteria. Doing so is expected to reveal valuable information that helps specify the functioning mechanisms of APT in poverty alleviation, and thus provide theoretical support for APT.

Three APT themes

Destination competitiveness

The last decade has seen a rapid expansion of literature in tourism addressing destination competitiveness, which reflects the escalating competition in contemporary global and regional tourism markets (e.g. Kozak & Rimmington, 1999; Pearce, 1997; Ritchie & Crouch, 2000, 2003). From discussions on destination image and attractiveness to comprehensive considerations of a wide range of destination attributes (Enright & Newton, 2004), this line of enquiry has developed into a significant field of research in tourism and now destination competitiveness has been widely recognised as a decisive factor influencing the performance of destinations. Yet a close examination of the literature reveals that few studies to date have paid serious attention to the destination competitiveness of the developing world, especially impoverished destinations. Although admittedly it is less likely for a newly developing, still fragile tourism economy to build up its competitiveness in a manner that

could overpower leading competitors, appropriate competitiveness is still required in order to survive and thrive, at least to differentiate itself from the most immediate competitors (Ritchie, 2004). UNWTO (2002: 94) reinforces this view, stating that 'commercial viability is paramount ... the poor do not have sufficient resources ... to risk engaging in initiatives which do not have strong links to demonstrably viable markets for their goods and services'.

In terms of Ritchie and Crouch (2000), destination competitiveness combines both comparative advantages and competitive advantages. The former involves the endowed resource base that, both naturally and built, makes a destination attractive to visitors, while the latter refers to the ability to mobilise and deploy this resource base. In comparison to wealthy and established destinations, which have abundant resources to build up their strength in all or most aspects, impoverished destinations may only have comparative advantages on a very limited number of destination attributes like core attractions and cost/value. For this sake, it might be a more productive strategy if impoverished destinations were centred on seeking competitive advantages by wise deployment of the limited resources in hand and effective utilisation of second-mover advantages (Ritchie, 2004). Emphasis on competitive advantages will naturally put a high demand on such high-end functions as destination management on a daily, operational basis, and destination policy, planning and development in the long term (Ritchie & Crouch, 2003). Notably, due to the difference in the quality of human resource base, there could be a larger gap in these functions between wealthy, established destinations and impoverished destinations. Reducing such a gap obviously requires strategic, consistent commitment from the government in human resource development and the presence of an education and training-conscious private sector (Esichaikul & Baum, 1998; Liu & Wall, 2006). However, before the establishment of a strong human resource base, which evidently takes time and demands huge financial input, it is often necessary for impoverished destinations to procure external technical assistance in order to meet the most immediate needs in search of appropriate competitiveness, especially in the initial planning phase. The value of technical assistance in this regard has been well demonstrated by the development of Bali and Caribbean in early time (Miller, 1983) and Greater Mekong Sub-Region (GMS) recently (ADB, 2004).

Other related research has indicated additional insights for the competitiveness building of impoverished destinations with resource constraints. For example, seeking competitiveness in a smaller geographical scope and among reachable markets, rather than simply targeting at the global, continental or national level, has been recognised as a more practical and promising competitive strategy for destinations in the developing world (Ghimire, 2001; Saayman *et al.*, 2001). Implementation of such a strategy inherently requires a change of focus from dependency on inbound tourism to parallel development of domestic tourism. A direct advantage of domestic tourism is that it comparatively has much less resource demand on the destination and thus helps accumulate competitive elements in a gradual, manageable manner (Seckelmann, 2002; Sindiga, 1996). This may be best illustrated by the rise of China as a nation destination in the global tourism market, which benefits a lot from the sustained boom of China's domestic tourism that not only

contributes to the development of infrastructure, facilities and human resource base, but more importantly, has stimulated a strong, positive political will towards tourism (Wu *et al.*, 2000; Xu, 1999; Zhang, 1997). Another well-founded competitive strategy for impoverished destinations is to promote certain forms of tourism that are largely built upon or have wide linkages with resources locally available and distinct, such as cultural tourism (UNWTO, 2004b), agrotourism (Torres & Momsen, 2004) and rural tourism (Briedenhann & Wickens, 2004). Embedded in local features, these forms of tourism are usually the big attraction to foreign tourists, and in addition, can be organised without intensive investment and development. A logical extension of this strategy is to focus on attracting and marketing to non-institutional (Cohen, 1972) or allocentric-oriented (Plog, 1973) tourists, the tourists who have intense interests in experiencing the authentic local lifestyle but do not care much about the physical built environment. In recent years, the importance of developing partnerships among neighbouring destinations, for example, in resource sharing and collaborative destination marketing, has also been seriously noticed by academics and practitioners. The above-mentioned GMS tourism development project (ADB, 2004), for instance, is exactly intended to promote tourism and reduce poverty of this broad region by strengthening interregional cooperation in the fields like product design, service consistency, marketing and cross-border transit. Development of destination/attraction clusters (Jackson, 2006) and deliberate design of tour routes (Briedenhann & Wickens, 2004), two additional approaches recently suggested for impoverished destination, actually follow a similar principle, both aiming to enhance the destination competitiveness through partnerships.

Local participation

Despite the significance of destination competitiveness, it cannot be taken for granted that poverty will be automatically alleviated as a destination becomes more competitive in the tourism market. The high percentage of economic leakage and unequal benefit distribution caused by excessive and inappropriate use of nonresidents and the 'neocolonial' travel trade structure have been long noticed in the destinations of the developing world (e.g. Britton, 1982; Brohman, 1996; Brown, 1998). The inclusion of the second theme – local participation, demonstrates the need to emphasise the adequate involvement of local poor residents in the APT development process. The rationale for local participation is straightforward: if the poor, the targeted beneficiary, remain outside of the circle of the tourism economy, tourism means nothing or little to them. Specifically, local participation is believed to be able to create larger and balanced economic opportunities for the local poor, increase local tolerance and positive attitudes to tourism development, and facilitate the implementation of the principles of sustainable tourism (Tosun, 2005).

In terms of the different roles the poor play in APT development, their participation basically takes two forms, as shown in Figure 3. One form of participation is to be engaged in public councils and related decision making as community members, and the other is to pursue tourism-related economic activities as the input of local human resources, either wage/paid work or self-employment. In the theoretical sense, both forms of local participation

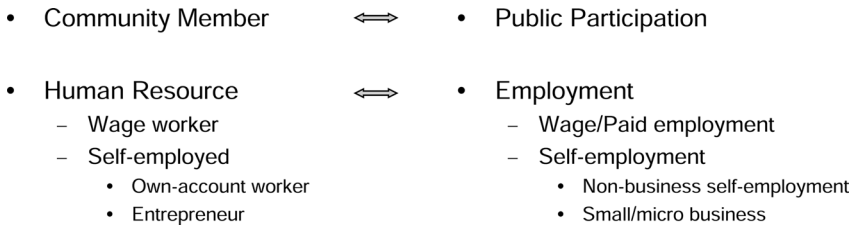


Figure 3 Roles of the poor and corresponding modes of participation in tourism

represent the indispensable processes for successful APT development (Ashley *et al.*, 2001; UNWTO, 2002, 2004a). Public participation not only serves to protect and promote the holistic well-being of the community to which the poor belong, but also contributes to democracy, equity and equality by making the voice of the poor heard and in full consideration (Keogh, 1990; Simmons, 1994); in contrast, participation by employment is mainly driven by individual endeavours to reap economic benefits tourism brings and thus has more direct impacts on the life of poor households. Although both forms of local participation are equivalently important, a scan of the tourism literature reveals that they have been unevenly treated. Previous research has been heavily focused on employment, with scanty attention to public participation. On one hand, the overt emphasis on employment reflects the fact that the creation of employment opportunities has been dominantly set as a top priority of tourism development in the developing world. On the other hand, this comparative neglect of public participation may also be partly due to the short history of the participatory tourism development approach in the developing world and thus little evidence available for analysis (Tosun, 2005). Noticeably, as for research on employment, there also exists an unbalanced treatment of wage/paid employment and self-employment. Relevant research to date has been narrowly tilted to the study of formal wage/paid employment, mostly hospitality services (Liu & Wall, 2006), whereas self-employment, especially in the informal sector, is largely neglected. For example, research on family business, entrepreneurship and small business – a significant, quickly expanding body of literature in tourism, has not yet paid serious attention to the initiatives of socially disadvantaged groups such as the disabled, women, children, indigenous people and ethnic minorities, which account for most of the poor of this world. Such a weakness, evidently, should be rectified in the future research.

Recently, the practicability and effectiveness of local participation in the context of the developing world have been somewhat questioned (Dahles & Keune, 2002; Tosun, 2000; Zimmerman, 2000). In essence, APT development is not simply a form of charity (Ritchie, 2004). The economic performance of the poor in tourism development still to a large extent depends upon their own rent appropriation capability, which is especially true in decentralised economies. However, the disadvantaged socioeconomic status of the poor, characterised by lack of human and financial capital, greatly constrains their abilities to identify and pursue well-rewarding employment opportunities in

the tourism sector (Liu & Wall, 2006). It is not uncommon that in many destinations of developing countries, nearly all or most well-remunerated management positions are occupied by foreign professionals; in addition, local small enterprises and vendors could be easily squashed out of the market by multinationals and other better-standing competitors (Brohman, 1996; Brown, 1998). Besides employment, public participation of the poor in tourism is also not encouraging. According to Tosun (2000), due to a variety of operational, structural and cultural barriers embedded in impoverished areas, real mass public participation actually seldom happens to the poor. In local tourism development, spontaneous participation that provides full managerial responsibility and authority to the host community is believed to be a form the most beneficial to locals in comparison to induced participation and coercive participation (Tosun, 1999). Nevertheless, the reality is that induced and coercive participation are much more common modes to be found in developing countries (Tosun, 2006).

The above discussion has indicated a gap between the theoretical soundness and practical invalidity of local participation in the context of the developing world. To bridge this gap essentially requires an adapted model of local participation, which should be based upon the development of a deep understanding of the participatory behaviors of the poor at the grassroots level. Correspondently, a bottom-up approach in research and policymaking should be necessarily adopted in order to replace or supplement the traditional top-down approach (Altieri & Masera, 1993; Murray & Greer, 1992). Some more concrete methods to foster local participation in impoverished destinations have also been recommended, such as decentralisation of public administration system, fundamental changes in socio-political, legal and economic structure, involvement of non-government organisations (NGOs) and donor agencies, collaboration and cooperation of international tour operators and multinationals, and dissolution of cultural barriers (Tosun, 2000, 2006). However, a challenge to the implementation of these methods is that they involve a wide range of stakeholder groups whose interests in local participation may even conflict with each other. In addition, some of the methods require transformation of the political system and culture (e.g. decentralisation of public administration system and dissolution of cultural barriers, as specified above), which obviously goes beyond the scope of tourism and is less likely to be realised in the short term.

Destination sustainability

The third theme – destination sustainability, highlights the need to view APT development from a long-term perspective. In recognition of the fundamental importance of sustainability to the ongoing competitiveness of a destination, Ritchie and Crouch (2003: 33) pointed out that ‘a destination which, for short-term profit, permits the rape and pillage of the natural capital on which tourism depends is destined for long-term failure’.

For impoverished destinations, sustainability especially should be a focus of concern in that ample evidence has indicated an overlap between unsustainable actions and poverty (Dasgupta *et al.*, 2005). Poorer households are more resource dependent than are the rich. Environmental degradation lowers agricultural and other incomes of the poor, and conversely the poor become even

more relied on natural resources, furthering the process of environmental degradation and increasing poverty (Duraiappah, 1998). Such a poverty-environment trap has been seen in many areas struggling with poverty (Dasgupta *et al.*, 2005). The tendency of unsustainable development in APT is further intensified by the fact that tourism is a sector heavily built upon natural capital (Collins, 1999). Although tourism can directly contribute to sustainability by providing rationality and funding for conservation and by replacing certain resource extraction economies like mining, hunting and logging, a wide variety of economic, social and environmental problems resulting from poor planning and management of tourism should not be neglected or underestimated (May, 1991; Romeril, 1989). This is especially true for impoverished destinations in that their tourist products are mostly nature-based and sensitive, and they often lack resources to monitor any tourists, let alone mass tourism. In addition, the sociopolitical and legal environment of impoverished destinations is often characterised by incompleteness, ineffectiveness and poor governance, thus counterproductive to sustainability (Mowforth & Munt, 1998). Based upon the experience of Turkey and other developing countries with tourism development, Tosun (1998, 2001) concluded that unsustainable tourism development in the developing world is largely attributed to inappropriate economic policy, backward development approaches, ineffective public administration, over commercialisation and unfavourable international tourism system. Hence, although the general principles and approaches of sustainable tourism development also apply to impoverished destinations, these particular issues and problems attached to impoverished destinations obviously require special consideration. As commonly pointed out by many researchers (see Wahab & Pigram, 1997), probably what is the most crucially needed in Third World tourism development is a fundamental change in policy and decision making from a short-term, money driven mind-set to a long-term, future-oriented vision.

So far, the first three levels of the ladder, inclusive of the components, have been individually detailed. These three levels – ‘poverty alleviation’, ‘determinants’ and ‘APT themes’, together with the links among them, holistically communicate a central proposition that in APT development, the increase in destination competitiveness, local participation and destination sustainability can enhance the opportunity, empowerment and security of the poor, and further contribute to the reduction of poverty. Although the validity of this proposition is pending upon empirical tests, which is beyond the scope of this present work, the soundness of this proposition lies with providing a more concrete roadmap to explore the theoretical foundations for the tourism-based approach to poverty alleviation. In this sense, it mainly serves to inspire future enquiries at this stage.

APT stakeholders

Over the past decade, the significance of stakeholder involvement and collaboration in tourism planning and development has been well entrenched in tourism literature. Appropriate stakeholder management is believed to be cost saving in the long run, contribute to the integration of knowledge, lead to well-informed decisions, and ensure equity and equality by reducing

power imbalance among different stakeholders (Jamal & Getz, 1995; Reed, 1997; Ryan, 2002; Sautter & Leisen, 1999). The inclusion of a stakeholder dimension in the framework reflects this growing importance of the concept 'stakeholder' and highlights the necessity to give full consideration to the primary stakeholders and their interactions in APT, which can to a great extent shape the nature, impacts and even destiny of this kind of development initiative. Admittedly, the composition of primary stakeholders may vary significantly across different specific contexts, with changes in salience, interests and relations. However, intended to serve as a conceptual starting point, the list of stakeholders in the framework has been identified in the broadest sense.

Among the six primary stakeholder groups, as listed at the bottom of the framework, the poor, private sector and governments are relatively straightforward (Ashley *et al.*, 2001; Roe & Urquhart, 2001; UNWTO, 2002, 2004a). The poor are the targeted beneficiary of APT, and thus their interests absolutely should be accorded full consideration in the planning and development process. It is worth reminding that although presented as a single stakeholder group in the framework, the poor are not necessarily homogeneous in terms of assets, skills, social networks, confidence, etc. Special attention should be paid to the well-being of the poorest of the poor as they are least capable of directly participating in tourism enterprises. The private sector is the fundamental power that energises the development of tourism and plays a wide range of essential roles such as investment, product development, marketing and operation (Ashley & Roe, 2003). So, without the strong support of the private sector, the tourism sector can hardly grow to the extent that phenomenally benefits the impoverished destination and local poor. The involvement of governments in APT development is also inevitable and necessary. For one thing, poverty alleviation has been among the top agenda of most, if not all, governments in developing countries (World Bank, 1990, 2000). Second, given the fragmented nature of tourism and the escalating competition in the global tourism market, the development of a robust tourism economy is nearly impossible in the absence of the leadership and appropriate intervention of the public sector (Jenkins & Henry, 1982; Pearce, 1998). In addition, if sustainable tourism development is to be achieved, the public sector will also need to play a strong role in terms of education, coordination, regulation and even implementation (Mowforth & Munt, 1998; Wahab & Pigram, 1997).

Tourists, as the customers and money source of destinations, should be a salient stakeholder group in the normative sense, but unfortunately they are seldom given full consideration in the practical planning and development process. The premier difficulty in embracing tourists in stakeholder management lies in their indefinite identity in that the tourists of a certain destination are a quite fragmented, dynamic and amorphous body with diverse interests. For this sake, questions as to who should represent tourists in general and what kind of interests to represent are extremely difficult to be decided. However, the practical difficulty for the direct involvement of tourists in stakeholder management does not discount the value to consider tourists a key stakeholder. Demand analysis on tourists, for example, can have a decisive impact on the product design and market development of the destination. In addition, if guided appropriately, tourists can play a more active role in poverty

alleviation by being pro-poor during their travels in impoverished host places. Prior research is heavily limited to the discussion of the economic benefits tourists bring to the poor, with a few notable exceptions, for example Wearing's (2001) seminal book on volunteer tourism and Selzer's (2004) pioneer work on travelers' philanthropy. Actually, tourists can help the local poor in a variety of non-economic ways, such as temporary voluntary work, small charitable donation, cultural exchange and knowledge transfer in the encounters, and so on (UNWTO, 2004a). These non-economic benefits may have a more profound influence on the life of the poor. Of course, since APT is in essence commercial tourism, the traveling experience of tourists cannot be compromised for these non-economic pro-poor favours. However, in a related comment, the process of helping others itself might be able to bring great pleasure to philanthropic tourists, and if they are organised, this type of tourists could form a distinct force to attack the poverty of impoverished destinations.

The identification of civil society as a primary stakeholder reflects the rising significance of civil society in contemporary development practices (World Bank, 2000). Civil society, as a collective concept, refers to a multi-level group of voluntary and non-profit organisations that, independent from the state, market and family spheres, are dedicated to promoting public good, especially for marginalised or disadvantaged social groups (Hadenius & Ugglå, 1996). Due to its independence and distinct roles, it has been promoted as an effective tool to address the failure in the governance of the state and market. Civil society is also an important medium through which aid is channelled in that it has a common interest in development and is able to reach to the poorest of the poor (Edwards & Hulme, 1996). In APT development, civil society can play a positive role in a variety of ways, for example to seek development funds, campaign for business ethics, amplify the voice of the poor at the policy level, provide free training and guidance, support small/micro business initiatives and promote a democratic participatory process (Ashley *et al.*, 2001; UNWTO, 2004a). These functions, though supplementary in nature, are often indispensable in the developing world, especially when both the state and market have proved to be dysfunctional and against the poor.

Aid donors, in the framework, specifically refer to those entities that generously provide loans, grants or other kind of assistance to support APT development projects. Although aid donors usually do not directly participate in development, they have the legitimacy to ensure that the money or other resources they have donated are used for the purposes they desire. The aids, especially those channeled through international development agencies, have been one of the most important sources of development funds for impoverished nations (World Bank, 1990). Thus, the salience of aid donors as a primary stakeholder group in APT is expected to grow fast as their interest in this kind of development initiatives increases.

APT and other poverty alleviation approaches

The upper parts on both sides of the central ladder are concerned with the relationship between the tourism-based approach and other customary approaches to poverty alleviation, such as charity and philanthropy, debt

relief, education and training, information and communication technologies (ICTs), agrotechnology transfer, microfinance, voluntary resettlement, etc. Although all of these approaches purportedly work towards the same end—poverty reduction, they are not necessarily complementary to each other due to differences in the principle, priority and resource demand. For example, resettlement of the poor to places with better living conditions, a popular approach to address poverty in mountain regions, is obviously contradictory to the principle of APT since the latter emphasises finding economic opportunity exactly from the previous residence and surroundings rather than escaping from these. APT is also not consistent with charity and philanthropy in that it focuses on the capacity building of the poor and income generation rather than directly giving to them. In contrast, some other approaches like education and training, ICTs and microfinance (UNWTO, 2005) are basically close partners to APT. On one hand, these approaches, from different angles (human capital, information access and financial capital), can enhance the capability of the poor to participate in and benefit from tourism development. Thus, in the presence of these approaches, it is relatively easier to achieve the targeted objectives of APT. On the other hand, the success of APT will also provide supports for the implementation of these complementary approaches. However, it is cautioned that there are also potential conflicts between APT and these ‘buddy’ approaches. A brutal reality in most impoverished places is that resources available to poverty alleviation are usually quite limited and do not allow plural implementation of all or most of these approaches. For this sake, the practical decision as to which approach or approaches should be adopted is largely dependent upon the comparative effectiveness and efficiency of each approach in poverty alleviation. In this sense, those complementary approaches are actually competitive to APT. It should be admitted that each poverty alleviation approach has its own merits and tourism is not a panacea for any impoverished place. In planning APT, there is a crucial need to comparatively evaluate the pros and cons of the tourism-based approach to poverty alleviation, a need that has been largely neglected by previous research. A meaningful but also challenging thesis in this regard is to investigate the ways in which tourism can effectively team up with other poverty reduction strategies. So far, some valuable work has been done on the agriculture-tourism link and its implications for poverty reduction (e.g. Torres & Momsen, 2004).

Environments of APT

Tourism, as an open system, is subject to a variety of influences and pressures that, arising within or outside the tourism domain, constitute the development environments of tourism. In the framework, the macro environment of APT represents the forces that, often global in scope, broadly affect all human activities. Although these forces may be not directly related to tourism, they can result in events that are profound in their implications for world tourism and thus APT development. For example, events like the 9/11 terrorist attack, the breakout of the severe acute respiratory syndrome (SARS), the Indian Ocean tsunami and more recently, the rocketing of oil price, have caused fundamental changes in some destinations’ attractiveness to tourists, shifts in the pattern of

travel flows, adjustments of tourism businesses and transformations of tourism philosophy. Noticeably, for a certain destination, a change in the macro environment may mean challenges, opportunities, or both. It is important that APT planners maintain a monitoring system to identify and analyse the global forces they believe are relevant to the needs of tourism development so that they can strategically adapt to the macro environment, which is in a constant state of change and evolution.

The micro environment of APT is made up of entities, influences and forces that lie within the immediate arena of tourism activities and competition. Because of its proximity and greater sense of immediacy, the micro environment to a great extent determines the destination's ability to serve its visitors, local poor and other stakeholders. Basically, the micro environment of a given destination can be divided into two parts – internal and external. The internal part involves the entities that participate in the operation and delivery of the destination's tourism product or experience, such as suppliers, attractions, travel trade, related and supporting industries and destination management organisations. Consideration of these internal entities and their interactions can help identify potential conflicts among the entities and align the variety of interests with the central development objective of APT – poverty alleviation. In comparison, the external part of the micro environment mainly refers to the competitive environment posed by rival destinations. A scrutiny of the external environment of the destination will greatly facilitate APT planners to conduct competitive/collaborative analysis and take strategic actions in order to enhance the destination competitiveness.

Identifying Research Needs and Opportunities: The Use of the Framework

So far, the proposed integrative framework on APT has been portrayed, with the components individually examined. Although some major issues and themes relating to tourism and poverty alleviation have surfaced in the process, the implications of the framework for research largely remain unclear, especially given that the linkages in the framework are not adequately considered. This section seeks to fill this gap. In the following, three general approaches to use the framework to inform research will be first suggested and based on that, a number of research needs and opportunities will be highlighted.

Three general approaches to guide research through the framework

The most straightforward approach to examine and use the framework is to focus on each of the components. The presentation of the framework in the previous section has indicated that each component actually represents a relatively independent research domain with its own distinct problems and issues. If research were organised around the same component, significant research problems and issues concerning that component would be systematically and thoroughly identified and researched; as a result, a deep understanding of the nature and roles of the component in APT will be developed. In accordance with the main purpose of this study, this paper has only provided an overview of each component. Following the above-suggested approach, a natural extension

of the present work will be to open up and flesh out each of the boxes (components) in the framework, as illustrated by Figure 3 that has decomposed 'local participation' into several more specific, researchable factors.

Although each component has their own discourse, it also should be noted that there are frequent information, resource and other kind of exchanges or interactions occurring among the components. In full recognition of this, the second suggested approach is to horizontally examine the linkages among the components of the same dimension. Since this approach focuses on the relations of two or more components rather than a single component, it can reveal many additional research problems and issues that the first approach cannot. The first venue in which such an approach may lead to productive results is the stakeholder dimension. In APT, primary stakeholders are usually closely interconnected via a variety of geographic, sociocultural, economic and political nexus. It is through these nexus that the behaviours and performance of a certain stakeholder is influenced or even shaped by other stakeholders. Thus, examination of these nexus is expected to result in more insights with respect to stakeholder management. The same approach certainly can be equally employed to understand the theme and determinant dimensions. As for the theme dimension, research can be focused on the interrelations among destination competitiveness, local participation and destination sustainability. The affinity between destination competitiveness and sustainability is well established in the literature (Ritchie & Crouch, 2003), and so is between local participation and destination sustainability (Mitchell & Eagles, 2001; Tsaur *et al.*, 2006). By comparison, the relation between local participation and destination competitiveness largely remains unexplored. A positive correlation between these two themes cannot be taken for granted in that local participation in impoverished destinations is usually characterised by small capitalisation, inexperience and lack of expertise; thus, deep involvement of foreign companies and professionals is often required in order to keep competitive, especially in the early stages of tourism development (Ashley & Jones, 2001; Endo, 2006). So, further research is clearly needed to advance the current poor understanding of their relationship.

A more advanced approach to use the framework to guide research is to examine the linkages of two or more dimensions, which is expected to better reflect or reveal the dynamics and operating laws of APT development. Maybe the most prominent thesis using such an approach is to test the propositions put forward in the last section concerning the relations among APT themes, determinants of poverty alleviation and the final end – poverty alleviation, as described by the arrows in the central ladder of the framework. From a theoretical perspective, pursuing these propositions may provide sound foundations for the tourism-based development approach to poverty alleviation. From a practical perspective, these propositions can serve as the guidelines to evaluate and monitor the effects of APT development. The approach can be similarly applied to understand the roles of the primary stakeholders in the building or enhancement of destination competitiveness, local participation and destination sustainability. Any combination of the components in the theme and stakeholder dimensions could be a distinct research topic. For example, research can be conducted on how civil society can contribute to

local participation, or how the private sector can be better organised to build destination competitiveness. Along this line of enquiry, more significant research issues will emerge.

Highlights of research needs and opportunities

Based upon a comprehensive consideration of the literature and related discussions so far, the following research needs and opportunities have been identified and recommended as thought worth immediate or considerable attention in future enquires relating to tourism and poverty alleviation:

- *Themes–determinants–poverty alleviation nexus*: The significance of investigating the relations among these three levels has been iterated throughout the text. The nexus represents the central proposition of the framework regarding the principles of APT, and definitely should be among the top agenda of research.
- *Appropriate competitiveness*: Although seeking appropriate competitiveness may be the wisest competitive strategy for impoverished destinations, the content of appropriate competitiveness has not yet been specified. There is a considerable amount of literature on tourism policy and tourism management, but relatively little is suitable to the needs of those in impoverished destinations. Thus, there is a need to develop a conceptual model of appropriately competitive destination based on the realities of the developing world. A possibility in this regard is to adapt an existing, well-accepted framework, which, developed by Ritchie and Crouch (2003), identifies the factors that determine the competitiveness and sustainability of tourism destinations in developed countries. The adaptation of such a framework requires a deep understanding of the fundamental differences between developed and impoverished destinations, which can be achieved by exploring the views of relevant stakeholders, especially views from the stakeholders in impoverished destinations.
- *Entrepreneurship of the poor*: Entrepreneurship of the poor, as a big component of self-employment, has been severely under-reported in primary literature, especially in tourism (Echtner, 1995). Previous research is largely limited to the discussion of two types of entrepreneurs – growth and profit-driven and lifestyle (Getz & Carlsen, 2000; Getz & Petersen, 2005). Although poor entrepreneurs also fantasy growth/profits and desired lifestyle, their immediate goal of running a small/micro business may be just to shake off poverty and earn a comfortable life. Another particular characteristic of poor entrepreneurs is that they are often pushed, rather than pulled, to get involved in business activities, especially when there are few livelihood options available to them. The wide involvement of the poor in the informal sector further complicates their entrepreneurial phenomenon because the informal sector economy is very difficult to monitor, measure and research. Possible research topics relating to the entrepreneurship of the poor in tourism could be to investigate the nature and roles of entrepreneurial participation, antecedents and factors, ways of resource procurement, survival and growth strategy, etc. All these research topics highlight a need to focus on the

grassroots-level initiatives, and will lead to valuable information for the bottom-up policymaking process.

- *Involvement of the private sector:* Given that the rise of the APT movement around the world is a recent phenomenon, the acceptance by the private sector of the development philosophy requires time. At this stage, research on the private sector is critically needed to address two levels of the question. First, the private sector is basically concerned with customers and profits, and its engagement in APT to a large extent is driven by commercial opportunity, not simply ethical appeal (Ashley & Haysom, 2004). So, the question as to how impoverished destinations can create an attractive investment environment to motivate the private sector to participate in APT development should be paid close attention of research. However, on the other hand, it also should be noted that in the past the poor of many destinations have failed to benefit significantly, if not have suffered, from the deep involvement of the private sector (Brohman, 1996; Brown, 1998). As in the case of Quintana Roo, Mexico, Torres and Momsen (2005) found that while tourism development generated profit for transnational corporations and entrepreneurial elites, it did not achieve backward linkages that may have improved conditions for local impoverished population. Thus, there is a cry for some fundamental changes in traditional business practices. Although the endorsement and promotion of certain worldwide ethics campaigns such as the Global Code of Ethics for Tourism, Fair Trade and Corporate Social Responsibility is helpful, it is also necessary to investigate the ways in which APT planners can work together with the private sector to better serve the needs of the poor based on a win-win principle. The Pro-Poor Tourism Pilots in Southern Africa, a project dedicated to facilitating and enhancing the contribution of companies to the poor, has resulted in some very valuable tips and tools in this regard (Ashley, 2006), which can serve as an initial guide and literature base for further enquiries.
- *Travellers' philanthropy:* Travellers' philanthropy, as a newly promoted campaign, is founded on the assumption that there exist a considerable proportion of altruistic tourists who would love to visit impoverished destinations and volunteer to help the poor. To evaluate the possible impacts of such a campaign on poverty alleviation, the assumption should be first empirically tested. The testing can be based upon a general survey of tourists visiting impoverished destinations regarding their overall belief, attitude and intention about travellers' philanthropy. For a given impoverished destination, a detailed segmentation analysis can be conducted to identify those pro-poor, or potentially pro-poor, market segments. Although the phenomenon of travellers' philanthropy has been in evidence, there is a wide recognition that sporadic, spontaneous efforts must be organised and coordinated if it is to play a more influential role. In the implementation of travellers' philanthropy, a very important part of work is to bridge the helps that could be offered by tourists and those in the needs of the visited destination, which essentially requires the establishment of global or regional information and research networks. There is also a crucial research need to understand and address

the concerns of tourists interested in travellers' philanthropy, especially the barriers that limit their opportunity to pursue philanthropic behaviours, e.g. safety and security.

- *Integration of APT with other poverty alleviation approaches:* It is worth rementioning that for a given impoverished area, tourism is just one of the many development options. Since poverty usually results from a complex array of root causes, the elimination of poverty inherently requires an optimum combination of multiple approaches. Although the previous conceptual consideration of the relationships between tourism and other poverty alleviation approaches has provided some insights in this regard, empirical research is especially valuable in the search of an optimum combination because the appropriateness of a certain development approach is highly dependent upon the specific circumstances under consideration. Given that APT is not yet widely practiced, more pilot project-based research, with a special focus on the integration of tourism with other poverty alleviation approaches, may be necessarily conducted before some general recommendations can be made for impoverished destinations. From a practical perspective, these pilot projects should seek to explore the effective ways in which APT development practitioners can take full advantage of the currently operated poverty alleviation networks.

Conclusion

As pointed out earlier, researchers being engaged in the field of tourism and poverty alleviation are still a small community, and related research to date is quite fragmented. The ST-EP programme, as a global action framework to harness tourism to reduce poverty, candidly recognises the significance of research for the success of APT and calls for the establishment of a worldwide research base so that research initiatives in this field can be coordinated, concerted and shared (UNWTO, 2002). The website, www.propoortourism.org.uk, launched and managed by the Pro-Poor Tourism Partnership, provides an initial model in this regard. The proposed integrative research framework is also intended to serve a similar purpose. It has been shown that it not only contributes to the clarification of the boundary and scope of APT research, but also functions as a public platform for researchers with diverse background and interests to identify and discuss common themes and issues embedded in the framework.

The framework represents one of the exploratory attempts to specify the principles and mechanisms of the tourism-based approach to poverty alleviation. From a tourism development perspective, 'destination competitiveness', 'local participation' and 'destination sustainability' have been independently presented as the three must-be-addressed themes in APT development and research. Under the guidance of stakeholder theory, the primary stakeholders that play influential roles in APT have also been identified. Another noteworthy feature of the framework is that it sets APT in a broader context for examination and thus brings more insights into the research of this field. First of all, an adequate understanding of the linkages between tourism and the general principles of poverty alleviation is emphasised. Although these linkages are subject to empirical testing, they provide

concrete clues to seek theoretical foundations for APT. Second, previous research mostly limits the scope of enquiries within the boundary of the tourism system. In contrast, this framework fully recognises tourism is an open system, and suggests research should consider the impacts of both macro and micro environments on APT. Furthermore, the potential limitation of tourism in alleviating poverty is also appropriately acknowledged in the framework by considering the competitive and complementary relations of tourism with other customary poverty alleviation approaches. It is cautioned that tourism is not suitable to all impoverished areas and that even if in the impoverished areas where tourism works, tourism also should be wisely combined with, rather than simply replace, other effective poverty alleviation approaches. Overall, the framework not only contributes to the formulation and maturation of APT as a distinct field of enquiry by making the link between tourism and poverty alleviation clearer, but also can be used as an organising device to unite a wide variety of research initiatives. Studying the phenomenon of APT is no longer perceived as solely the responsibility of researchers in tourism. Rather, inputs from various disciplines are welcome as long as they address certain components of the framework.

Although originally intended to inspire research, the framework also has practical implications for the planning, development and management of APT. One of its direct contributions in this regard is that the framework provides planners and managers a holistic picture of the APT development system through which they will gain a clear sense of the factors and relations that need close consideration. Second, as indicated earlier, the components and their inter-relationships embodied in the framework can serve as the major indicators so that the performance of APT development initiatives can be regularly evaluated. Furthermore, the framework also reminds planners and managers of the importance of stakeholder involvement and collaboration.

It should be noted that as a way of facilitating future research on APT, the framework just describes a skeleton of this emerging research field, and the components and embedded relationships in the framework are conceptualised in a highly abstract format. A logical step in extending the current work is to examine and use it in the ways suggested in this paper, which will enable the generic modeling to be tested and refined and thus provide further insights into the peculiarities of the APT phenomenon. Since APT research is cross-disciplinary in nature, relating to both tourism and poverty, a broader review of the development literature on poverty rather than narrowly focusing on the tourism literature is also very meaningful and necessary in order to seek more theoretical justification for the constituent components and structure of the framework. In addition, considering that APT research is essentially oriented to solving the real-world problem – poverty, it is strongly suggested that theoretical development should be well aligned with simultaneous close attention to the progresses made in practical APT development projects. That said, the framework should be developed on an ongoing 'learning' basis as researchers conduct research around it on a continuous, iterative basis, as well as continuing to monitor contributions to the literature, and to observe the activities and performance of organisations such as ST-EP.

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Notes

1. The ST-EP programme consists of four components. The first component is a research base that seeks to identify linkages, principles and model applications regarding sustainable tourism and poverty alleviation. The second component is an operating framework to promote and develop incentives for good practice among companies, consumers and communities. The third component is in the form of forums through which a diversity of stakeholders (private, public and non-governmental) can be brought together, and information, ideas and plans shared and exchanged. The fourth component is the ST-EP Foundation dedicated to attracting financing from business, philanthropic and government sources. More information about ST-EP is available at the official website 'www.unwtostep.org'.
2. The Pro-Poor Tourism Partnership has contributed to the majority of extant literature on tourism and poverty alleviation, which was collectively published on the website 'www.propoortourism.org.uk' for free access and download by researchers worldwide. The Partnership has a special interest in experimenting and implementing the pro-poor tourism strategies crafted by Deloitte and Touche, *et al.* (1999), and so far nearly all of the research reports and papers posted on the website are deeply built upon empirical evidence. Another important outlet of research on this topic is UNWTO (2002, 2004a, 2005), which also heavily focuses on issues relating to planning, operation and implementation. By comparison, theoretical discussion and conceptualisation of the relationship between tourism and poverty alleviation are paid much less attention.
3. While the proposed framework adopts the World Bank's (2000) model for development and poverty alleviation that has received prominence in recent years, it should be acknowledged that the model is not without controversy among researchers and development practitioners. Serving as a powerful actor in international development, the World Bank is often criticised for taking a particular slant on neoliberalism, which advocates privatisation, market reform and external policy intervention in the developing world (Goldman, 2005). Not surprisingly, its current development and poverty alleviation approach generally represents such a neoliberal stance. For example, as to the concept 'empowerment', the World Bank (2000) mainly considered it in both a political and an economic sense, but there was no discussion of other ideas on empowerment such as John Friedmann's (1992) book that accords equivalent attention to psychological and social empowerment. Similarly, in interpreting the component 'opportunity', the World Bank (2000) only highlighted the importance of economic opportunity to the poor. By absorbing the World Bank's model into the research framework, we may risk blocking a more holistic view on development and poverty alleviation, and as such, there is a justified need to look beyond the World Bank's neoliberal stance. We will not venture further in this regard, but we do want to convey the point that the framework, essentially designed as a tool to stimulate thoughts and discussion, is open to debate and should be developed on a continuous, iterative basis.

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