

An analysis of research developments and opportunities in tourism, poverty alleviation and nature conservation

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Abstract

Sustainable tourism development is increasingly put forward as a promising mechanism for poverty alleviation and nature conservation. However, to date, knowledge about theories, roles and the practical contribution of tourism arrangements, policy and plans in relation to poverty alleviation and nature conservation still appears to be under a process of experimentation. Research studies are scattered and there is a clear need to systematize the knowledge produced. This paper aims to address this need by analyzing a number of papers, discussing tourism, poverty alleviation and nature conservation issues, that were published in 17 scientific journals related to social science during the period 2003–2006. It classifies past research developments and research knowledge produced and identifies research gaps and opportunities by taking into account societal needs.

Keywords: tourism, poverty alleviation, nature conservation, sustainability.

1 Introduction

In recent years the dominant discourse on sustainable development has drawn attention to the need to link nature conservation and poverty alleviation issues. As a consequence poverty alleviation- and environmental conservation-oriented policies, plans and strategies turned out to be top priorities in the international agenda (e.g. MEA [55]; NEPAD [60]; UN [86]; World Bank [90]). However, to date, knowledge about theories, roles and the practical contribution of tourism arrangements, policy and plans in relation to poverty alleviation and nature conservation still appears to be under a process of debate and experimentation and there is the need to systematize the knowledge produced in recent years.



Some recent studies have analyzed the making and the evolution of tourism academic knowledge and have provided some interesting results about trends and productivity in scientific research (Jogarathnam et al. [34]; Xiao and Smith [92]; Xiao and Smith [93]). These studies however examined tourism research from a broad perspective, and they did not specifically look at the knowledge generated in the field of tourism, nature conservation and poverty reduction.

This study aims to address this gap. By analyzing 83 scientific papers published in 17 different social science journals from 2003 to 2006 and discussing tourism, poverty alleviation and nature conservation issues, this study provides an indication of the direction of past scientific research work and explores research gaps and opportunities also taking into account societal need. Ultimately the findings of this analysis may guide and inspire a future research agenda.

This paper first presents the method used for mapping scientific knowledge. Then, it examines the main research topics, the modes of knowledge production and geographical focus of past studies. Additionally, and based on the findings described in the previous sections, it discusses about societal needs and future research opportunities.

2 Analysis of research developments: the method

In order to identify the knowledge produced in tourism, poverty reduction and nature conservation, a number of scientific past studies discussing these issues are analyzed. Time constraints and practicalities imposed a restriction with regard to the types and numbers of studies to be examined. A total number of 17 journals that could represent the richness and variety of social sciences perspectives and disciplines were selected, including top journals in the tourism field and journals dealing with sustainability and global change issues. The selected journals are: *Annals of Tourism research*, *Current Issues in Tourism*, *Journal of Ecotourism*, *Journal of Sustainable Tourism*, *Journal of Tourism Research*, *Journal of Travel Research*, *Tourism Economics*, *Tourism Management*, *Tourist Studies* and also *Biodiversity and Conservation*, *Ecological Economics*, *Environmental and Development Economics*, *Environment Development and Sustainability*, *Environmental Monitoring and Assessment*, *Journal of Environmental Management*, *International Environmental Management*, *World Development*.

Then, a number of articles published in these journals in the period 2003-2006 were selected. This selection is made by using a number of keywords that directly or indirectly address some typical issues in tourism, poverty reduction and nature protection. The articles selected are those that contain in the title words and/or paper's keywords at least one of the following keywords: *sustainability*, *community*, *stakeholder*, *poverty*, *nature*, *environment*, *protected area*, *impact*, *management*, *decision making*, *social*, *cultural*, *fund raising*, *market mechanisms* and that discusses in a general or specific manner issues related to sustainable tourism, poverty reduction and nature conservation.



To clarify, this means that a paper is not included in the analysis if for example the article has as keyword one of the keywords listed above but does not refer to the issues we are discussing in this report. Due to time constraints we have not taken into account (and therefore not included as keywords) other important issues and aspects, for example pollution problems, climate change, specific sea-coastal tourism issues, city tourism, etc. that are gaining more and more attention in the research agenda. The total number of articles selected is 83. Although the analysis does not include all existing papers ever published in the field of tourism, nature conservation and poverty reduction, it is believed that the papers selected provide a suitable representation of research studies carried out in this field in the past years.

3 Analysis of research developments: the results

3.1 Analysis of research topics

The papers selected according to keywords as explained above are firstly sorted out according to the main theme they refer to. A total of four themes are identified, namely: 1. Tourism and Poverty Reduction; 2. Tourism and Nature Conservation; 3. Tourism, Poverty Reduction and Nature Conservation; 4. Tourism and Sustainability. Secondly, the selected papers are classified within each theme according to the specific topic they address.

Only one main topic addressed in each paper is taken into account. This means that if a study simultaneously addresses more than one topic, this study will be classified only according to the main topic discussed. Topics are identified and classified by analyzing the specific aim and key research questions that each selected paper is addressing. Table 1 presents the selected papers classified by theme and topic.

3.2 Analysis of modes of knowledge production

Although, in practice, the choice of a research topic depends on a number of factors (e.g. the interest of the researcher, negotiation with financing institutes), analytically we can make a distinction between two ways in which the selection of a research topic is made (see also Lengkeek and Platenkamp [43]). First, a wide variety of practical concerns may present topics for research. In this mode of knowledge production research is first and foremost *problem-oriented*. The knowledge produced by research is oriented towards (possible) application and use. This type of knowledge production often accepts the socio-political, economic or cultural context as given and source of problem. Second, an equally wide range of topics for research derives from scientific and intellectual interest. Here the research is *concept-oriented*, that is oriented towards development of theory, concepts and (new) methodologies, which should enable us to explain societal phenomenon (in a more positivistic tradition) or to interpret and understand meanings in a more phenomenological perspective. Here concepts are, as far as possible, abstracted from the daily context.



Table 1: Studies classified according to theme and topic.

<i>Tourism-Poverty</i>		Nr
Ex-post impact evaluation	Clifton and Benson [10]; Dyer et al. [14]; Nyaupane et al. [63]; Saayman and Saayman [72]	4
Community participation	Briedenhann and Wickens [6]; Tosun [84]	2
<i>Tourism-Nature</i>		
Ethics and discourses	Jamal et al. [33]; Holden [30]; Shultis and Way [74]	3
Ex-post impact evaluation	Hill and Pickering [29]; Kuvan [40]; Li et al. [48]; Li et al. [49]; Priskin [71]	5
Management	Brown [5]; Buultjens et al. [4]; Cheng et al. [7]; Gios et al. [22]; Hannam [24]; Henderson [27]; Kenneth et al. [36]; Kruger [39]; Li [46]; Mason [52]; Phillips and Jones [70]; Okello and Kiringe [65]; Sorice et al. [77]; Stein et al. [80]; Tisdell and Wilson [83]; Wachowiak [89]	16
Environmental performance of tourism enterprises	Clarke [9]; Herremans et al. [28]; Masau and Brideaux [51]; Spenceley [79]; Van der Duim and van Marwijk [87]	5
Financing mechanisms	Alpizar [1]	1
Stakeholder roles, values and partnerships	Buckley [3]; De Oliveira [13]; Duffy [15]; Fairweather et al. [16]; Fennell and Butler [19]; Lewis and Newsome [44]; Medina [56]; Naidoo and Adamowicz [58]; Nyaupane et al. [64]; Svoronou and Holden [82]; Wurzinger and Johansson [91]	11
<i>Tourism-Poverty-Nature</i>		
Ex-post en ex-ante impact evaluation	<i>Ex-post</i> : Gossling [23]; Kontogeorgopoulos [38]; Silori [75]; Stone and Wall [81] <i>Ex-ante</i> : Mbaiwa [54]	5
Management	Fennel and Weaver [18]; Hawkins [25]; Jamal et al. [32]; Nepal [61]; Northcote and Macbeth [62]; Osland and Mackoy [66]; Tsaur [85]	7
Stakeholders roles and involvement	Adams and Infield [2]; Garrod [20]; Li [45]; Li [47]; Palmer [67]; Sithole [76]; Southgate [78]	7
Communities attitudes and intentions	Kuvan and Akan [41]; Lai and Nepal [42]; Sekhar [73]	3

Table 1: Continued.

<i>Tourism-Sustainability</i>		
Concepts and approaches	Choi and Sirakaya [8]; Farrell and Twining-Ward [17]; Ko [37]; Macbeth et al. [50]	4
Applications and methods to evaluate sustainability	Cottrell et al. [11]; De la Barre [12]; Gezici [21]; Helmy [26]; Jamal and Tanase [31]; Johnston and Tyrrell [35]; Mbaiwa [53]; Mycoo [57]; Parker and Khare [68]; Van der Duim and Caalders [88]	10

In this study the selected papers are classified according to the problem- or concept-oriented modes. As depicted in figure 1, results of this research indicate that about 74% of the total papers analyzed are problem-oriented whereas only about 8% of the papers are concept-oriented. Furthermore this analysis suggests that about 18% of the selected studies are the results of a particular blending of problem- and concept-oriented research. These studies discuss concepts, theories and methods while presenting them in specific contexts or by means of particular case studies. This mix shows the existing link and inter-relation among the two modes of knowledge production.

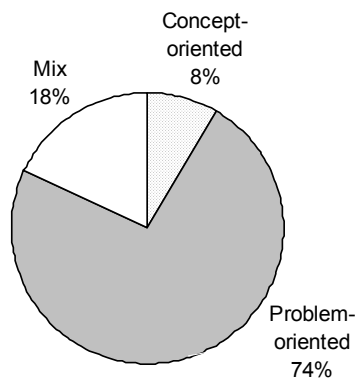


Figure 1: Modes of knowledge production.

3.3 Analysis of distribution of case studies per region

The majority of problem-oriented studies and of studies developed through a mix of problem- and concept-oriented research are focusing on the application of specific case studies in a number of regions. Results depicted in figure 2 indicate that case studies examining tourism-poverty issues are highly overlooked. They are completely absent in some critical regions such as South America and Central America seriously suffering from poverty issues. Tourism and nature conservation research is spread in the various regions of the world, especially in Oceania, Europe and Asia. The few sustainable tourism studies are focusing on Europe and Africa. Finally integrated studies on tourism, poverty and nature

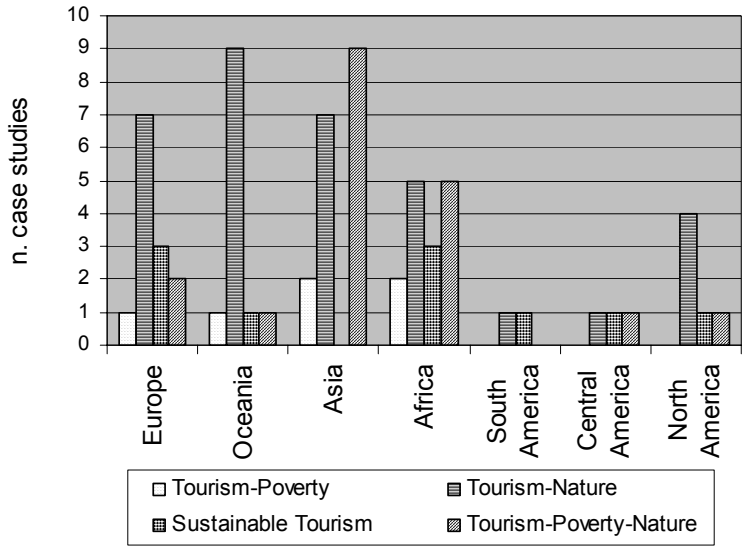


Figure 2: Geographical distribution of case studies.

conservation were mainly carried out in Asia and Africa. In future research, case studies could focus on key areas suffering from poverty and nature degradation issues and overlooked in past studies.

4 Research opportunities and conclusion

The vast array of studies especially focusing on problem-oriented and case study driven research could at first give the impression that research carried out in the past years in sustainable tourism, poverty alleviation and nature conservation is very much focused on contributing to enriching knowledge concerning concrete societal issues and needs. A more comprehensive examination of the topics, the research questions and findings of the papers under analysis show that several major societal and global concerns are actually very much overlooked in past studies.

There is a lack of studies focusing and discussing about the contribution of tourism to Millennium Development Goals (MDGs). The UN clearly stated that in 2007, at the midway point between Millennium Development Goals adoption in 2000 and the 2015 target date for achieving these Goals, some countries, for example sub-Saharan Africa, are not on track to achieve any of the Goals (UN [86]). Although the UN, policy makers and researchers stress that the capacity to systematic measure, monitor and report on progress of the various implemented initiatives is at the heart of a sustainable development policy and the achievement of Millennium Goals (Nature [59]; NEPAD [60]; UN [86]) there is a lack of monitoring and evaluation studies investigating the actual contribution of tourism to achieve any of these specific objectives.



Research efforts in impact and management studies appears to be scattered, empirical studies are lacking, existing approaches lack a coherent and integrated framework around which natural assets and poverty issues can be clustered and managed consistently. Monitoring, evaluation and management frameworks should be developed further in order to take into account the complexity and uncertainty related to the tourism system (Farrell and Twining-Ward [17]). It should be examined what potential value holds the science of complexity for tourism management and governmental and non-governmental policies. Research could focus also on adaptive management as a way of dealing with uncertainty and unpredictability. Furthermore, research should look not only at the overall benefits derived from tourism, but also on equity issues and the distribution of environmental, economic and social benefits among stakeholders and especially among the poor. Additionally, past evaluation studies are almost entirely focusing on ex-post evaluation of arrangements, policies and plans. There is therefore the need to include ex-ante evaluation studies in the research agenda, which can provide useful information when setting up new tourism plans and strategies.

Another important aspect is the need for comparative analysis across destinations. The literature analyzed consists predominantly of case studies about unique destinations in various regions. They provide results and reflections about management, impacts or other specific issues in a specific area. Although it is clear that constraints, challenges and opportunities posed by tourism differ across locations, it appears also evident that there is the need to increase knowledge about critical factors that influence the outcome of tourism for poverty alleviation and nature conservation. Research should therefore attempt to identify and isolate underlying factors across destinations that contributed, or not, to the effectiveness of tourism for poverty and for nature. Rather than providing a fixed set of rules, comparative analysis can provide a set of options and elements upon which to reflect before and during the implementation of certain tourism arrangements and plans. Methodologically there is the need to elaborate new comparative approaches also building on the experience gained in the development and application of comparative methodologies in other fields within social science (Pearce [69]).

Since a number of years societal organizations point out that tourism can play a very important role in providing sustainable financing for protected areas and creating incentive measures for managing natural resources and for supporting the poor. However, currently besides (entrance and user) fees, taxes and site-specific negotiation, or donation not much was done in order to develop innovative types of payment schemes and investigated their profitability and the impact of such schemes on the locals and on the poor. Research can contribute by providing knowledge about the application and the effectiveness of current mechanisms and by increasing their level of sophistication. New arrangements should therefore be investigated. Furthermore, attention should be given to the role of the poor in potential partnerships and arrangements. The modes of participation of poor communities should be further investigated by taking into account local socio-political-institutional constraints. Research could also



explore various manners for social and political empowerment of local communities.

Additionally the development of concept-oriented research is needed in order to provide the philosophical, conceptual and methodological ground upon which practical research can be implemented. Future research could focus on critically examining tourism and its role for nature conservation and poverty. Especially it should focus on the role of tourism for poverty and the multi-dimensions of poverty, considering that there is a lack of studies addressing these issues. Research studies could also focus on investigating the evolution of the concept and meaning of sustainability for tourism and vice versa.

A research agenda is therefore required to promptly address and investigate these and other urgent critical issues in order to contribute to the production of scientifically robust and socially meaningful knowledge at a global and local level.

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