

Sheet No. 1: Defining Pro-Poor Tourism

Pro-Poor Tourism (PPT) is tourism that results in increased net benefits for poor people. PPT is not a specific product or niche sector but an approach to tourism development and management.

It enhances the linkages between tourism businesses and poor people, so that tourism's contribution to poverty reduction is increased and poor people are able to participate more effectively in product development.

Links with many different groups of 'the poor' need to be considered: staff, neighbouring communities, land-holders, producers of food, fuel and other supplies, operators of micro tourism businesses, craft-makers. The poor can also benefit by the use that they may be able to make of tourism infrastructure (e.g. roads) and resources (e.g. water).

There are many types of Pro-Poor Tourism strategies (see Sheet No 2), ranging from increasing local employment to building mechanisms for consultation.

Any type of company can be involved in Pro-Poor Tourism – a small lodge, an urban hotel, a tour operator, an infrastructure developer. The critical factor is not the type of company or the type of tourism, but that an increase in the net benefits that go to poor people can be demonstrated.

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Pro-Poor Tourism Partnership:
ICRT - Harold Goodwin; IIED - Dilys Roe; ODI - Caroline Ashley.
Website: www.propoortourism.org.uk
Contact us at: info@propoortourism.org.uk

Sheet No. 2: Overview of Pro-Poor Tourism Strategies

Strategies for Pro-Poor Tourism can be divided into those that generate three different types of local benefits: economic benefits, other livelihood benefits (such as physical, social or cultural improvements), and less tangible benefits of participation and involvement. Each of these can be further disaggregated into specific types of strategies.

Types of PPT strategies

Increase economic benefits	Enhance non-financial livelihood impacts	Enhance participation and partnership
<ul style="list-style-type: none"> Expand local employment, wages:– commitments to local jobs, training of local people. Expand local enterprise opportunities – including those that provide services to tourism operations (food suppliers etc.) and those that sell to tourists (craft producers, handicrafts, guides etc.). Develop collective income sources – fees, revenue shares, equity dividends, donations, etc. 	<ul style="list-style-type: none"> Capacity building, training. Mitigate environmental impacts. Address competing use of natural resources. Improve social and cultural impacts. Increase local access to infrastructure and services provided for tourists – roads, communications, healthcare, transport. 	<ul style="list-style-type: none"> Create a more supportive policy/planning framework that enables participation by the poor. Increase participation of the poor in decision-making by government and the private sector Build pro-poor partnerships with the private sector. Increase flow of information and communication between stakeholders to lay the foundation for future dialogue.

Strategies focused on economic benefits

In general, staff wages are a massive boost to those few that get them, small earnings help many more to make ends meet, and collective income can benefit the majority, but can often be misused. Thus, all three types are important for reaching different poor families. Strategies to create these benefits need to tackle many obstacles to economic participation, including lack of skills, low understanding of tourism, poor product quality and limited market access.

Wilderness Safaris (South Africa) has a local employment policy, which has resulted in a high proportion of jobs at its lodges going to local people. The company also has a training programme, which enables local people to advance in the company. As well as benefiting the local community, Wilderness Safaris benefits from low staff turnover.

Strategies to enhance other (non-cash) livelihood benefits

In Ecuador, Tropic Ecological Adventures raised funds from clients to buy a radio for one remote community, which is a huge leap for them in terms of communications – especially in emergencies. Tropic also allows community members to use communication facilities at its head office and provides transport in emergencies. The community cites contact with the outside world as one of the main benefits of their involvement with Tropic.

These strategies can often begin by reducing negative impacts – such as cultural intrusion, or lost access to land or coast. But, more can be done to then address these issues positively, in consultation with the poor. Opportunities to increase local access to services and infrastructure often arise when these are being developed for the needs of tourists, but with some consultation and adaptation could also serve the needs of residents. Strategies for capacity-building may be directly linked to boosting cash income, but may also be of more long-term indirect value, such

as building the management capacity of local institutions.

Strategies focused on policy, process, and participation

In the Caribbean, the St Lucia Heritage Tourism Programme is driving a process of policy reform at the national level, which will help mainstream local enterprises into the tourism industry there. In Southern Africa, the Namibia Community Based Tourism Association facilitates the development of partnerships between local communities with secure rights over wildlife resources and private operators wishing to run safari enterprises on community land.

Implementing these strategies may involve lobbying for policy reform, involving the poor in local planning initiatives, amplifying their voice through producer associations, and developing formal and informal links between the poor and private operators.

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Sheet No. 3: Tourism and Poverty Reduction – Making the Links

Tourism is an increasing phenomenon in developing countries (see Sheets No 4–7). As such, it affects the livelihoods of many of the world's 'poor'. However, to date, its potential for poverty reduction has been insufficiently recognised and exploited by developing country governments and development assistance agencies. In most cases, tourism has generally been viewed as an engine for economic growth rather than as a mechanism for delivering on poverty reduction (see Sheet No 8).

Many argue that because tourism is often driven by foreign, private sector interests, it is not well placed to contribute much to poverty elimination. Indeed, tourism can disadvantage the poor causing displacement, increased local costs, loss of access to resources and social and cultural disruption. Furthermore, the juxtaposition of rich holidaymakers alongside poor people is one that evokes a knee-jerk reaction amongst many development professionals that tourism is a frivolous industry and not to be taken seriously.

Tourism is not a panacea for economic development and decisions about whether or not tourism (domestic or international) presents viable opportunities for local economic development need to be made locally in the context of the other opportunities that exist for local pro-poor development. Development through tourism faces many of the generic constraints confronting other economic sectors - tax, regulatory obstacles, FDI confidence etc. However, work on Pro-Poor Tourism has identified several reasons why tourism seems to be particularly relevant to poverty reduction and to achieving the Millennium Development Goals (summarized in Figure 1) including:

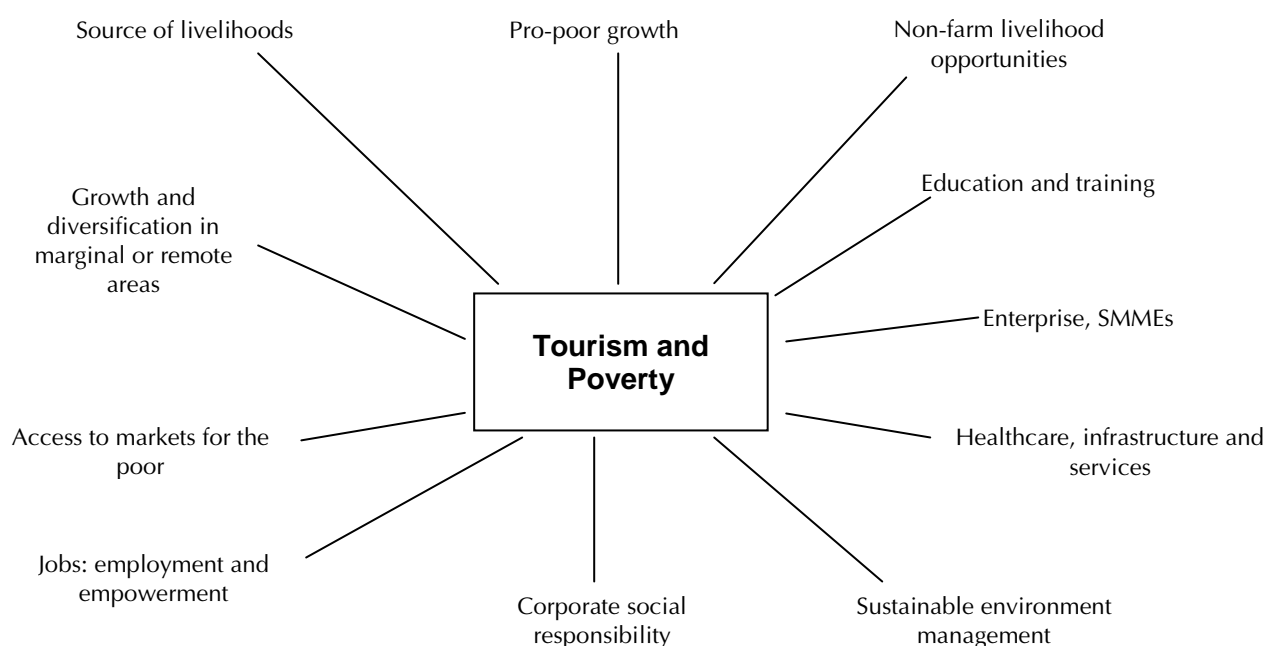
- Many of the countries in which tourism is an important economic sector are among the poorest and least developed in the world. Tourism is significant for the vast majority of these countries with the highest numbers of people living below the international poverty line of US\$ 1 per day. In 2000, tourism ranked third among the major merchandise export sectors of developing countries – including the Least Developed Countries (WTO 2002).
- Tourism can be one of the only viable sources of growth or export earnings in some countries or regions with few other development options. Tourists are often attracted to remote areas because of their comparative advantage in terms of high cultural, wildlife and landscape values. As these may have few other development options, the poverty-reduction value of these tourism opportunities is high.
- The nature of the tourism product means that it often draws on assets of the poor (cultural knowledge, natural resources, rural space), employs and trains a high proportion of vulnerable groups: women, youth, un-skilled workers, and rural residents, and can include a wide cross-section of enterprises including SMMEs and the informal sector.
- The infrastructure required for tourism development – transport, communications, healthcare, water and sewage, energy supply – is also of utmost important to poor residents and can uplift an area for the benefit of both.

Furthermore, there seems to be more potential to influence the pro-poor nature of business development in tourism than in other sectors. This is because:

- business interest and engagement in sustainable/ethical/responsible tourism debates already exists;
- governments continue to have a strong role in planning, licensing, regulating, and marketing. Tourism is one of the few sectors that is still based on 'master plans', providing an invaluable entry point to influencing the sector at the national level.
- There already exists a significant body of 'lessons learned' and 'good practice' case studies.

While tourism will always be driven by the business imperative not by poverty targets, Figure 1 shows some of the many ways in which tourism can contribute to the development challenges involved in poverty reduction.

Figure 1: Linking tourism and poverty reduction



Pro-poor growth

Perhaps the most significant factor linking tourism and poverty reduction is its potential to be a form of 'pro-poor growth'. Pro-poor growth has been identified as the most important ingredient to achieve sustainable poverty reduction (e.g. UN 2000; World Bank 2000a; Ravallion 2001, World Bank 2000b). Pro-poor growth can be broadly defined as growth that enables the poor to actively participate in and significantly benefit from economic activity. This is to say: the proportional income growth of the poor (however defined – e.g. the poorest 20% or the people below a national poverty line) must exceed the national average income growth rate. If the average per capita growth in a country is, for example, 2%, pro-poor growth must mean that the per capita income growth rate of the poor must exceed that rate. This is a major departure from the "trickle-down" development concept, which assumes that the benefits of general economic growth will permeate to all sectors of society.

Table 1 first outlines some of the advantages and disadvantages of tourism as a potential for substantial growth in developing countries. It then summarises the particular features of tourism that enhance its potential contribution to pro-poor growth (drawing on Deloitte & Touche, IIED and ODI 1999, Ashley, Roe and Goodwin 2001, WTO 2002).

Table 1: Tourism, growth, and pro-poor growth in developing countries

Tourism as a contributor to <i>growth</i>	
<i>Positive characteristics</i>	<i>Negative characteristics</i>
<ul style="list-style-type: none"> ▪ Growing industry: growth in Africa exceeds average global growth rates in tourism. ▪ A source of foreign exchange earnings and GDP contributions ▪ One of the few export/services sectors in which some poor countries have (or can develop) a clear comparative advantage: builds on their assets, can be competitive where transport costs are normally trade constraints ▪ By necessity, it involves international linkages and expertise: i.e. technology transfer. ▪ Potential for multipliers through the development of complementary product : the customer comes to the product (with wallet in pocket), instead of sending the product to the customer 	<ul style="list-style-type: none"> ▪ Requires substantial up-front investment to take-off: particularly infrastructure ▪ High degree of leakage: where there is a high degree of foreign ownership, import content of luxury tourism, and commercial structure. ▪ Vulnerable to sudden downswing (as are other export industries) ▪ Associated with low tax contribution (also related to vertical structure, and link between tourism investment and property deals)
Tourism as a contributor to <i>pro-poor growth</i>	
<i>Positive characteristics</i>	<i>Negative characteristics</i>
<ul style="list-style-type: none"> ▪ Labour intensive (on average, more labour intensive than manufacturing) ▪ Employs a high percentage of women (relative to other industries in a given cultural context) ▪ Can involve more intensive use of un-skilled and semi-skilled labour ▪ Can build on assets of the poor: their land and culture (land tenure and control over cultural commercialisation are important). ▪ Suited to some remote (i.e. poor) areas: contributes to spatially-dispersed growth. ▪ Potential for involvement of a wide variety of enterprises, including SMMEs and informal sector. Because the customer comes to the product, local entrepreneurs gain opportunities for sale of other goods and services ▪ Involvement of the poor can go beyond (migrant) employment in urban/industrial hubs: a variety of economic and decision-making roles are possible in dispersed locations ▪ Non-commercial or indirectly commercial interests provide avenues for expanding PPT strategies. E.g. ethical tourism niche, moves to responsible tourism and sustainable tourism; lodge managers who have made 'lifestyle choices' with destination commitment, and role of government in policy and planning. 	<ul style="list-style-type: none"> ▪ Disruption or expropriation of land, water, and other assets of the poor by tourism industry ▪ Entry barriers to poor entrepreneurs: the industry is information/contact/marketing intensive ▪ Local economic linkages are often less than hoped: high transaction costs can be involved ▪ Cultural exploitation, unwelcome commercialisation of culture

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Sheet No. 4: Developing Countries' Share of the International Tourism Market¹

This PPT info-sheet provides key data on international tourism to developing countries when compared to EU and OECD countries. For a detailed report of tourism to developing countries please refer to the WTO report *Tourism and Poverty Alleviation* (WTO 2002) which was used as a base for writing this summary. PPT Info-Sheet No 5 provides a more detailed breakdown of specific developing countries that are important international tourism destinations.

Table 1: The size and value of tourism to various country groupings

Country grouping	International arrivals in 2000 (in '000)	Tourism expenditure in 2000 (in US\$ million)	Value per international arrival in 2000 (in US\$)
Worldwide	697,700	476,000	-
OECD	471,164	330,464	701
EU	283,604	179,041	631
Developing countries	292,660	138,937	475
of which: Least Developed Countries	5,106	2,594	508

Source: WTO 2002²

Out of a total of 697 million international arrivals in 2000, approximately 42% took place in developing countries. In 1973, developing countries' share of international arrivals was only 20.8% of global visitor flows. By 2000, this had more than doubled to 42% (or just under 300 million). Approximately 0.7% of these visitors go to the Least Developed Countries (LDCs). Developing countries receive approximately 30% of global tourism expenditure, while LDCs receive approximately 0.5%.

In 2000, the financial value per arrival to developing countries was considerably lower than the value per visitor to OECD or EU countries. However, between 1990 and 2000, developing countries, and particularly LDCs, secured a larger increase in the income per international arrival compared to OECD or the European Union countries. LDCs secured an increase of 45% and developing countries nearly 20%, compared with 18% for OECD countries and 7.8% for EU countries.

Between 1990 and 2000, by far the greatest growth in arrivals was seen in developing countries (Table 2). Developing countries increased their international arrivals by 94.4%. This compares to a growth rate of 39% in

¹ For a more detailed analysis of tourism statistics see Dilys Roe, Caroline Ashley, Sheila Page and Dorothea Meyer 'Tourism and the Poor: Analysing and interpreting tourism statistics from a poverty perspective', PPT Working Paper No.16, ODI, 2004

² The WTO uses the World Bank definition of 'developing' country. This therefore includes some major European destinations (Turkey) and some of the most rapidly growing ones in Eastern Europe (e.g. Bulgaria, Estonia, Slovakia).

both EU and OECD countries. The 49 LDCs received 5.1million international arrivals in 2000 - an increase of over 75% in 10 years. Tourism expenditure in developing countries also increased more rapidly than elsewhere: in EU and OECD countries it increased on average by about 50%, while expenditure in developing countries increased by 133% (154% in LDCs).

Table 2: Changes in arrivals and expenditure between 1990 and 2000 by country group

Country grouping	Increase in International arrivals between 1990 and 2000	Increase in tourism expenditure between (1990 and 2000)
OECD	39%	64%
EU	38%	49%
Developing countries	94%	133%
Least Developed Countries	79%	154%

Source: WTO 2002

Nearly 60% of international arrivals still take place in the relatively small number of OECD and EU countries and nearly 70% of global expenditure remains in the developed world. However, the traditional position of well-established destinations in the developed world is being increasingly challenged by new destinations in the developing world as numbers of arrivals and share of total arrivals is increasing at a far faster pace than those in developed countries. According to the WTO Vision 2020 report (WTO 2001) these trends are expected to continue well into the future.

Summary: *The scale of international tourism to developing countries – some key figures*

- Developing countries had 292.6million arrivals in 2000, an increase since 1990 of nearly 95%.
- The 49 Least Developed Countries (LDCs) had 5.1million international arrivals in 2000 and achieved an increase of nearly 75% in the decade.
- Developing countries are attracting an increasing share of global international tourist arrivals up from 20.8% in 1973 to 42% in 2000.

(WTO 2002:10)

References:

World Tourism Organisation (WTO) (2001) Tourism 2020 Vision – Global Forecast and Profiles of Market Segments. Madrid: World Tourism Organisation
 World Tourism Organisation (WTO) (2002) Tourism and Poverty Alleviation. Madrid: World Tourism Organisation

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Sheet No. 5: Developing countries as international tourism destinations

This PPT information sheet provides a brief overview of some developing countries that are important international tourism destinations. The statistical data for this section is taken from the World Tourism Organisation (WTO) as this is the most comparative and comprehensive data available¹. The data describes international travel flows, thus excluding domestic travel which can be highly significant in some regions including South Asia, Southern Africa and South America. It does include international business travel.

While the majority of international tourism occurs within a relatively small number of developed countries, developing countries have increased their market share considerably since the early 1970s (see PPT Info-sheet No 4). However, international tourist arrivals are spread very unequally among developing countries. The main reasons for this are the varying degrees of safety, accessibility and availability, standard of tourism infrastructure, tour operator links and connections, and historical and political links to the main generating areas. While tourism to developing countries is growing more rapidly than global tourism, there are large differences between regions and countries² (Table 1).

Table 1: Differences between developing countries in arrival numbers in 2000

Region	Countries with >10m arrivals	Countries with 5m to 10m arrivals	Countries with 1m to 5m arrivals
Americas	Mexico	Brazil	Dominican Republic, Cuba, Cost Rica, Jamaica, Argentina, Chile, Peru, Uruguay, Puerto Rico
East Asia / Pacific	China, Malaysia	Thailand, Indonesia, Oceania/Pacific Islands	Vietnam
Africa		South Africa, Tunisia	Morocco, Zimbabwe
Middle East		Egypt	Jordan, Syria
South Asia			India, Iran
CEE	Russian Federation, Poland, Hungary	Turkey, Croatia, Czech Republic, Bulgaria, Romania	

Table 2 provides a more detailed breakdown of arrivals by country, summarised in Figure 1. A number of key features characterise these destinations:

- All are middle-income countries (either upper or lower middle income)

¹ The WTO uses the World Bank definition of 'developing' country. This therefore includes some major European destinations (Turkey) and some of the most rapidly growing ones in Eastern Europe (e.g. Bulgaria, Estonia, Slovakia).

² For a detailed analysis see Dilys Roe, Caroline Ashley, Sheila Page and Dorothea Meyer 'Tourism and the Poor: Analysing and interpreting tourism statistics from a poverty perspective', PPT Working Paper N.16, ODI, 2004

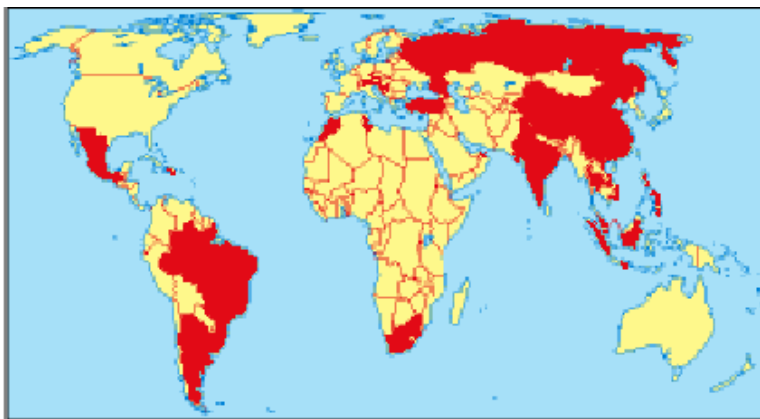
- The majority are located in, or adjacent to, the main generating areas of Europe, North America, Japan.
- A large number are featured by European, American and Asian tour-operators as mainstream package holidays (e.g. Mexico, Turkey, Thailand, Malaysia, Tunisia, Morocco, Puerto Rico, Dominican Republic). However, high volumes of arrivals also take place in countries that are not package holiday destinations (e.g. Central and Eastern Europe³). Here a high percentage of arrivals are independent travellers, business travellers and those visiting friends or relations (VFR).

Table 2: Developing countries with the most international arrivals

Rank	Country	Arrivals in 2000 ('000s)	Rank	Country	Arrivals in 2000 ('000s)
1	China	31,229	11	Czech Republic	5,700
2	Russian Federation	21,169	12	Brazil	5,313
3	Mexico	20,643	13	Indonesia	5,064
4	Poland	17,400	14	Tunisia	5,057
5	Hungary	15,571	15	Morocco	4,113
6	Malaysia	10,222	16	Puerto Rico	3,341
7	Turkey	9,587	17	Romania	3,274
8	Thailand	9,509	18	Argentina	2,991
9	South Africa	6,001	19	Dominican Republic	2,977
10	Croatia	5,831	20	Bulgaria	2,785

Source: WTO database (http://www.world-tourism.org/frameset/frame_statistics.html)

Figure 1: Developing Countries with High Arrival Numbers



This situation is not static, however. Table 3 highlights the developing countries that have grown rapidly in terms of international arrivals in the last decade – many of which are low-income countries. The highest growth rates are shown by South East Asia, although in many cases these can be explained by the very low starting point. Cambodia, Lao PDR and Myanmar, in particular, received few tourists in 1990 and although numbers are still not high in 2000 the rate of growth appears spectacular. This table also highlights strong tourism growth in African countries. These figures are rather more significant than those for South-East Asia given a higher starting point – particularly for South Africa.

³ The WTO estimates that by the year 2020, every third international trip within Europe will go to one of the Central or East European countries (WTO 2001). Growth rates between 2000 and 2001 were 14% for Bulgaria, 13% for Slovakia, and 9% for Estonia. Turkey has seen spectacular growth rates of international tourism arrivals since its emergence on the tourism circuit in the 1980s.

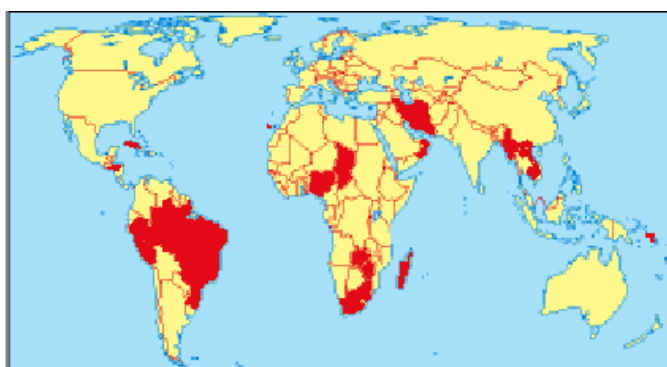
Table 3: The fastest growing developing countries in terms of international arrivals between 1990 and 2000

Rank	Country	Growth 1990 to 2000	Arrivals in 1990 ('000)	Arrivals in 2000 ('000)
1	Cambodia	2,641%	17	466
2	Lao PDR	2,043%	14	300
3	Iran	1,004%	154	1,700
4	Myanmar	890%	21	208
5	Vietnam	756%	250	2,140
6	Cape Verde	496%	24	143
7	South Africa	483%	1,029	6,001
8	Cuba	420%	327	1,700
9	Poland	412%	3,400	17,400
10	Chad	389%	9	44

Rank	Country	Growth 1990 to 2000	Arrivals in 1990 ('000)	Arrivals in 2000 ('000)
11	Brazil	387%	1,091	5,313
12	Nicaragua	358%	106	468
13	Nigeria	328%	190	813
14	Micronesia	313%	8	33
15	El Salvador	310%	194	795
16	Zambia	307%	141	574
17	Tanzania	227%	153	459
18	Peru	224%	317	1,027
19	Zimbabwe	209%	605	1,868
20	Madagascar	202%	53	160

Source: WTO database (http://www.world-tourism.org/frameset/frame_statistics.html)

Figure 2: The main growth destinations in the developing world.



While travel to developing countries has in the past frequently been the domain of independent travellers or niche operators⁴, a slight shift seems to have occurred by which 'off-the-beaten track' destinations are becoming of interest to a wider range of tour operators, and travellers. In the past two decades, several areas and destinations moved from receiving relatively small numbers of international arrivals to becoming large volume, mainstream package tour destinations sold by big tour operators in the UK, North America and Japan. Table 4 and Figure 3 highlight the developing country destinations that are significant to the UK package holiday industry.

⁴ The main exceptions to this are the traditional beach destinations in Northern Africa and the Caribbean.

Table 4: package holiday destinations in developing countries that are offered by the top UK tour operators

Tour operator	Developing countries included in the mainstream summer sun / winter sun 2003/04 programme	Other developing countries that are featured but in specialised programmes
<p>TUI UK examples from: Thomson Holidays (summer and winter programmes, 2003/4), Portland Holidays (summer and winter programmes, 2003/4), Tropical Places (summer and winter programmes, 2003/4), Thomson World Wide (summer and winter, 2003/4)</p>	<p>Antigua and Barbuda, Bahamas, Barbados, Borneo, British Virgin Islands China, Cuba, Dominican Republic, Dubai, Egypt, Gambia, Grenada, Grenadines India, Indonesia, Jamaica, Kenya, Malaysia, Maldives, Mauritius, Mexico, Morocco, Peru, Seychelles, South Africa, Sri Lanka, St Kitts and Nevis, St Lucia, Vietnam, Tanzania and Zanzibar, Thailand, Tobago, Tunisia, Turkey, Turks and Caicos, Vietnam</p>	<p>Botswana, Cambodia, Cook Islands, French Polynesia, Myanmar, Namibia, Nepal, Reunion, Samoa, Zambia, Zimbabwe</p>
<p>My Travel Examples from Direct Holidays summer sun 2003, and Tradewinds 2003/04</p>	<p>Antigua, Bahamas, Barbados, Brazil, China, Cuba, Dominican Republic, Dubai, Egypt, Gambia, Grenada, Indonesia, Jamaica, Kenya, Malaysia, Maldives, Mauritius, Mexico, Morocco, Seychelles, South Africa, Sri Lanka, St Lucia, Tanzania, Thailand, Tobago, Tunisia, Turkey, Vietnam,</p>	<p>Cambodia, Costa Rica, India, Myanmar, Oceania, UAE</p>
<p>First Choice Examples taken from: Main summer sun / winter sun brochure 2003 / 04</p>	<p>Antigua, Aruba, Bahamas, Barbados, Cuba, Dominican Republic, Egypt, Gambia, India, Jamaica, Kenya, Malaysia, Maldives, Mexico, Morocco, South Africa, Sri Lanka, Thailand, Tunisia, Turkey</p>	<p>Belize, Bhutan, Bolivia, Borneo, Botswana, Cambodia, China, Costa Rica, Equator, Eritrea, Ethiopia, Ghana, Guatemala, Indonesia, Iran, Jordan, Ladakh, Madagascar, Malawi, Mali, Mozambique, Namibia, Nepal, Pakistan, Peru, Sudan, Syria, Tanzania, Tibet, Zimbabwe</p>
<p>Thomas Cook (examples taken from beach holiday selection, main programme 2003/4)</p>	<p>Brazil, Barbados, Cuba, Jamaica, St. Lucia, China, Dominican Republic, Dubai, Egypt, India, Sri Lanka, Jordan, Kenya, Malaysia, Maldives, Mauritius, Morocco, Mexico, Polynesia, Seychelles, South Africa, Thailand, Tunisia, UEA, Zanzibar</p>	<p>Costa Rica, Indonesia, Nepal, Peru, Tanzania, Tunisia, Vietnam,</p>

Source: company websites accessed 28 May 2003

Figure: 3 The main (i.e. high arrival) package tour destination areas for UK visitors



Key trends⁵

1. **Developed to developed:** The majority of international tourism still takes place within the developed world. In 2000 seven of the top ten destinations were also among the top ten tourist generating markets, China being the sole representative of a developing country in both groups. Harrison (2001) argues that there has been remarkable consistency in these tables, which is not surprising given the volume of international visitors attracted by the top ten destinations. Changes in recent years have occurred predominately due to political reasons, in particular the opening up of several countries to international visitors such as China, the former Soviet Union and other Central and Eastern European countries.
2. **Developed to developing:** Although the majority of tourism occurs within the developed world, there is a strong and growing movement from North to South. The main generating countries are still located in Europe, North America and industrialised Asia. This is, however, expected to change with increased economic development in the South.
3. **Most travel is intra-regional:** The vast majority of international travel takes place within regions. Northern Europeans holiday predominantly in Southern Europe (particularly the Mediterranean), while the Caribbean and Mexico have been 'host' to the North American and Canadian snowbirds. This is hardly surprising given financial and temporal restrictions on travel for most people. However, this is slowly changing so that long-haul travel is used increasingly as the main annual holiday option due to decreasing real cost of flights, greater travel experience, and new destinations coming onto the market.
4. **International tourism to developing countries is significant and increasing:** Over 40 per cent of global tourism arrivals take place in the developing world. While the vast majority of well established destinations are middle-income countries, the fastest growers are low-income countries.
5. **Very distinct differences between developing countries:** While some developing countries are highly successful as destinations and have been able to attract large numbers of visitors, others have so far not entered the international tourism scene. The reasons for this vary greatly, they are linked to physical characteristics and climate; government commitment to tourism; security issues; accessibility; distribution channels; image and marketing; to name but a few. Destinations that have been adopted by mainstream tour-operators (especially in East Asia, North Africa and the Americas) show very high arrival numbers due to the capacities carried by the larger tour operators.
6. **Access to generating markets:** Generally, the top tourism countries among the developing world are relatively easily accessible. They have good international and national transport infrastructure as well as information, marketing and purchasing channels, often organised by mainstream tour-operators. This accessibility strongly influences the strength and importance of the tourism industry. Inaccessibility,

⁵ As analysed by several writers: see Harrison 2001, Mill and Morrison 1992.

especially in terms of land transport networks have led in the past to the high physical concentration of tourism infrastructure and the creation of enclave development close to major gateways, reducing significantly the distributive potential of tourism. Furthermore, the inaccessibility for developing countries to electronic reservation systems that are favoured by tour operators has hampered the success of many developing countries to capture the global tourism market.

Note: While the WTO collects inter-country comparative data on international tourists, domestic tourists as well as overnight tourists and same-day visitors, the most comprehensive and widely used data series is concerned with international arrivals, i.e. "Any person who travels to a country other than that in which s/he has her/his usual residence but outside her/his usual environment for a period not exceeding 12 months, and whose main purpose of visit is other than the exercise of an activity remunerated from within the country visited". These figures have a number of limitations:

- figures do not reflect the strength and significance of domestic tourism;
- not all countries are members of the WTO and the reliability of the data varies from country to country
- national data has limited utility in assessing the importance of tourism locally
- International visitor arrival figures focus purely on *volume* and not on the *value* of tourism.

However, WTO data is the most comprehensive data available that allows inter-country comparisons.

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Pro-Poor Tourism Partnership:
ICRT - Harold Goodwin; IIED - Dilys Roe; ODI - Caroline Ashley.
Website: www.propoortourism.org.uk
Contact us at: info@propoortourism.org.uk

Sheet No. 6: Economic data on international tourism's contribution to developing countries' economies¹

PPT Info Sheets No 4 and 5 illustrate the increases in international arrivals that have been experienced by developing countries in the last ten years. Although most travel still takes place in the developed world, the significance of tourism to the economy of a country is far more pronounced in the developing world, in particular in the Least Developed Countries (LDCs). The total amount of tourism revenue earned by any country is closely related to arrival figures, and thus countries with high arrivals numbers such as those discussed in Info-Sheet No 5 receive high levels of receipts (Table 1). However, countries where tourism makes the biggest *contribution to the national economy* are not necessarily those with high levels of receipts (Table 2). The vast majority of the countries where tourism is a major contributor to the country's GDP are small island states - particularly in the Caribbean - with a very well developed tourism industry and relatively few other economic alternatives.

Table 1: Developing countries with most significant tourism receipts

Position	Country	Tourism receipts 1999 (US\$ Million)
1	China	14098
2	Mexico	7223
3	Thailand	6695
4	Turkey	5203
5	Indonesia	4710
6	Brazil	3994
7	Egypt	3903
8	Malaysia	3540
9	India	3036
10	Argentina	2812
11	Philippines	2534
12	South Africa	2526
13	Dominican Rep.	2524
14	Croatia	2493
15	Morocco	1880
16	Cuba	1714
17	Tunisia	1560
18	Syrian Arab Republic	1360
19	Jamaica	1279
20	Costa Rica	1002

Source: WTO 2001

Table 2: Developing countries with most significant GDP contribution from the travel and tourism economy¹

Position	Country	Contribution to GDP 1999
1	Maldives	88%
2	Anguilla	71%
3	Saint Lucia	59%
4	Seychelles	49%
5	Vanuatu	41%
6	Barbados	41%
7	St Vincent and the Grenadines	33%
8	Jamaica	32%
9	Saint Kitts and Nevis	31%
10	Other Oceania	29%
11	Fiji	28%
12	Grenada	26%
13	Belize	26%
14	Mauritius	24%
15	Dominica	24%
16	Dominican Republic	24%
17	Jordan	23%
18	Kiribati	21%
19	Bahrain	17%
20	Tunisia	16%

Source: WTTC 2003¹ (note: figures have been rounded)

Export earnings from tourism are particularly high in countries with well-developed tourism industries – such as the Caribbean islands – and also in countries with limited alternatives such as Myanmar and Cape Verde (Table 3). Overall, for developing countries in general and LDCs in particular, tourism was the third most important export earner in 2000 (Table 4) – accounting in both cases for about 9% of exports (WTO 2002). For both groupings tourism exports are well ahead of both ores/metals and agricultural export earnings. Agricultural

¹ For a more detailed analysis of tourism statistics see Dilys Roe, Caroline Ashley, Sheila Page and Dorothea Meyer 'Tourism and the Poor: Analysing and interpreting tourism statistics from a poverty perspective', PPT Working Paper No.16, ODI, 2004

export earnings are only about one third of that of tourism export earnings for both country groupings. According to the WTO, if petroleum industry exports are discounted, tourism is the primary source of foreign exchange earnings in the 49 LDCs. Tourism is a principal export earner for 83% of developing countries and it is the principal export for one-third of them. The growth rate of tourism as export earner in developing countries in general is only outstripped by manufacturing (WTO 2002).

Table 3: Developing countries with most significant export earnings from tourism

Position	Country	Tourism exports as % of total exports 1999
1	Myanmar	94%
2	Maldives	74%
3	Antigua and Barbuda	67%
4	Saint Lucia	66%
5	Tanzania	55%
6	Anguilla	51%
7	Chad	51%
8	Barbados	50%
9	Saint Kitts and Nevis	50%
10	Vanuatu	48%
11	Other Oceania	47%
12	Cuba	47%
13	St Vincent and the Grenadines	45%
14	Jamaica	44%
15	Cape Verde	43%
16	Seychelles	41%
17	Grenada	41%
18	Dominica	37%
19	Tonga	37%
20	Fiji	35%

Source: WTTC 2003 (note: figures have been rounded)

Table 4: The top 4 export sectors in Developing Countries and Least Developed Countries in 2000, their values and growth rates between 1990 and 2000.

	Developing Countries Value in US\$ million	Growth between 1990 and 2000	Rank in 2000	Least Developed Countries Value in US\$ million	Growth between 1990 and 2000	Rank in 2000
Manufactures	900,649	208%	1	720	217%	2
Food	120,262	58%	2	334	-71%	4
Tourism	113,902	154%	3	335	47%	3
Fuels	73,624	16%	4	2,316	1,444%	1

Source: WTO 2002

Compared to the developed countries of the OECD and EU, it is clear that tourism is a particularly significant export for developing countries – and particularly the LDCs (Table 5). Given that only 0.7% of international travel takes place in LDCs the economic impacts of these ‘insignificant’ flows are very considerable. Furthermore, as with international arrivals, the economic significance of tourism in developing countries is growing rapidly (Table 6).

Table 5: Tourism as part of exports of goods and services in 2000 by country group

Country grouping	Travel as percentage of total exports in services	Travel as percentage of total exports in goods and services
OECD	28.1%	5.9%
EU	28.6%	6.3%
Developing countries	43.3%	6.5%
Least Developed Countries	70.6%	15.3%

Table 6: Developing countries with the strongest growing tourism contribution to GDP and export earnings

Rank	Country	GDP growth rate (in %) 1990 to 1999 ²
1	Botswana	454%
2	Tanzania	315%
3	Comoros	312%
4	Laos	305%
5	Suriname	258%
6	Namibia	235%
7	Cuba	205%
8	Bahrain	170%
9	Central African Republic	129%
10	Cape Verde	128%
11	Uganda	124%
12	Papua New Guinea	123%
13	Nicaragua	110%
14	Honduras	99%
15	Chad	73%
16	Burkina Faso	72%
17	Panama	71%
18	Zambia	70%
19	Sudan	59%
20	Sao Tome and Principe	56%

Rank	Country	Export earning growth rate (in %) 1990 to 1999 ⁴
1	Suriname	746%
2	Laos	589%
3	Uganda	579%
4	Nicaragua	476%
5	Cuba	450%
6	Tanzania	293%
7	Burkina Faso	291%
8	Central African Rep	245%
9	Syria	232%
10	Comoros	207%
11	Chad	204%
12	Bahrain	183%
13	Burma	160%
14	Cape Verde	157%
15	Botswana	156%
16	Zambia	141%
17	Rwanda	139%
18	Iran	139%
19	Yemen	132%
20	Dem Rep of the Congo	128%

Source: WTTC 2003

In addition to financial earnings, tourism also provides considerable economic benefits at the national level in the form of employment. Table 7 illustrates the large proportions of a country's population that can be employed in tourism and the rate at which this has changed over the last decade. Twelve of the top 20 countries have over 20% of the population working in tourism, and in two cases - the Maldives and Anguilla - the figure is over 50% . As a comparison with mainstream destinations in the EU the figures are 12% in France, 10% in Germany and 9% in the UK (WTTC 2003).

² Ranked by growth rate

Table 7: Developing countries with the highest levels of employment in tourism³

Position	Country	% of Population employed in travel and tourism 1990	% of Population employed in travel and tourism 2000 (%)	Change 1990-2000 (%)
1	Maldives	43%	52%	21%
2	Anguilla	35%	50%	42%
3	Saint Lucia	34%	42%	24%
4	Antigua and Barbuda	52%	40%	-23%
5	Saint Kitts and Nevis	45%	34%	-23%
6	Vanuatu	29%	33%	14%
7	Barbados	29%	29%	2%
8	Saint Vincent and the Grenadines	27%	28%	5%
9	Belize	17%	24%	36%
10	Jamaica	23%	23%	1%
11	Fiji	21%	22%	4%
12	Other Oceania	27%	22%	-20%
13	Cuba	12%	20%	63%
14	Mauritius	18%	19%	7%
15	Jordan	21%	19%	-10%
16	Cape Verde	7%	18%	147%
17	Grenada	17%	18%	9%
18	Guyana	18%	18%	-3%
19	Suriname	16%	17%	9%
20	Sao Tome and Principe	13%	15%	16%

Source: WTTC 2003 (figures rounded)

Summary: The economic importance of tourism for developing countries – some key figures⁴

- Tourism is a principal export earner for 83% of developing countries and it is *the* principal export for one-third of them.
- In 2000 tourism ranked third among the major merchandise export sectors for both developing countries and LDCs. If petroleum industry exports are discounted, tourism is the primary source of foreign exchange earnings in the 49 LDCs. Tourism is a much larger part of their economies (accounting for over 15% of all goods and services exported) than in other DCs, or the EU and OECD
- In countries that are most dependant on tourism (particularly small islands) tourism can account for 30-90% of GDP, 50-90% of exports, and can employ 20-50% of the population

³ Direct Employment refers to people directly employed in the Travel & Tourism industry. This generally includes those jobs with face-to-face contact with visitors, such as workers in airlines, hotels, car rental, restaurants, retail, entertainments. Indirect employment generally refers to people working for industry suppliers such as airline caterers, laundry services, food suppliers, wholesalers, accounting firms, government agencies, manufacturing and construction of capital goods and exported goods used in Travel & Tourism and supplied commodities, including steel producers, lumber, oil production, etc. *Source : World Travel & Tourism Council (2002), The Impact of Travel & Tourism on Jobs and the Economy.*

⁴ Source WTO 2002:10

NOTE: The World Tourism Organization and the World Travel and Tourism Council (WTTC) have developed a *Tourism Satellite Accounting (TSA)* system to estimate the value of the industry to the national economy. Satellite accounts are used to produce two different aggregates: those for the travel and tourism *industry* and those for the travel and tourism *economy*. The former captures direct impact of visitor activity (transportation, accommodation, food and beverage, recreation, entertainment and travel services). The latter captures the broader *economy-wide* impacts (i.e. direct and indirect impact of visitor activities, capital investment, exports and government services). The data used in this info sheet refers to the *tourism-economy* as this promises to provide a more comprehensive account. It should be noted however that the TSA system provides modelled figures rather than actual statistics, the accuracy of which relies on the comprehensiveness of the source data. This is better for some countries than others. It also does not take account of domestic tourism flows. However, despite the limitations WTO and WTTC data is the most comprehensive data available that allows inter-country comparisons.

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Website: www.propoortourism.org.uk

Contact us at: info@propoortourism.org.uk

Sheet No. 7: Economic data on the importance of tourism in the poorest countries

Defining “poor” countries

Just as there are many understandings of what is and isn't a developing country so it is equally difficult to draw up a definitive list of the 'poorest' countries. There is no international consensus on what poverty is and how it should be measured although a common way of defining what constitutes poverty is a financial income level below which people are described as poor. So-called 'poverty lines' have been defined both nationally, for individual countries, and internationally. At the international level, the World Bank has defined poverty as a per capita income of less than US\$1 per day (adjusted for purchasing power parity). This is also the indicator used in the United Nations Millennium Development Goals, one target of which is to halve the number of people living in poverty by 2015.

Poor countries can thus be categorised according to the proportion of the population living on less than \$1/day – although it should be noted that comprehensive, comparable data does not exist for all countries.¹ Poor countries can also be categorised according to the absolute numbers of poor people (defined as above) rather than the proportion – thus large countries with large numbers of poor people such as India and China would feature, rather than smaller countries which may have a larger proportion overall (but a smaller absolute number) of poor people, such as Mali and Burkina Faso. Other indicators commonly used include average GNI (gross national income) or GDP (gross national product) per capita – although again it should be noted that in countries with high levels of wealth inequality this indicator may be severely distorted by the proportion of the population with a high income.

All of these indicators are limited in that they focus purely on finances and ignore the multi-dimensional character of poverty. However, given the lack of other commonly-used measures, for the purposes of this PPT information sheet, data is provided on the importance of tourism in the poorest countries defined as:

- those which contain the greatest numbers of the 1.2 billion people who live on less than \$1/day (Table 1);
- those with the highest proportion of people living on less than \$1/day (Table 2); and
- those with the lowest average per capita GNI² (Table 3).

In addition, Table 4 provides tourism statistics for the 49 countries described by the United Nations as the “Least Developed” in terms of their income, human assets and economic vulnerability.

Key Trends

The tables show that tourism makes significant contributions to national GDP in the majority of countries with the largest numbers, and highest proportions, of poor people. Data on tourism contribution to GDP is sketchier for countries that rank amongst the 50 poorest according to average per capita GNI. However, The Gambia, Laos PDR, Tanzania, Papua New Guinea, Zambia and Kenya stand out as being poor countries where tourism is a highly significant economic sector.

¹ Another internationally recognised poverty line is US\$2 per day per person. While there are many problems in trying to use these exactly to measure poverty, and country-specific measurements and other measures of human development are important, the broad issue is to focus on countries where the 1 billion poorest of the world live.

² Gross national income (GNI) is the sum of value added by all resident producers plus any product taxes (less subsidies) not included in the valuation of output plus net receipts of primary income (compensation of employees and property income) from abroad. GNI per capita is gross national income divided by mid-year population. GNI per capita in US dollars is converted using the World Bank Atlas method. The GNI (rather than GDP) is frequently used as a basic poverty indicator.

Table 1: The significance of tourism in countries with the highest numbers of poor people

Position	Country	Population below 1\$/day (million) ³	International arrivals in 2000 ('000) ⁴	Growth in international arrivals 1990-2000 (%) ⁵	Contribution of tourism economy to GDP in 1999 (%) ⁶	Tourism receipts as percentage of exports in 1999 ⁷
1	India	461.9	2641	54.72	4.9	8.7
2	China	237.1	31229	197.9	9.8	10.4
3	Nigeria	91.2	813	327.9	2.7	10.9
4	Pakistan	45.8	543	28.1	5.1	10.4
5	Bangladesh	38.8	200	73.9	3.4	2.1
6	Ethiopia	21.0	125	58.23	6.3	26.2
7	Brazil	20.4	5313	387	7.6	8.3
8	Mexico	16.4	20643	20.2	10.4	19.3
9	Indonesia	15.5	5064	132.5	9.8	12.9
10	Russian Federation	10.3	21169	n.a.	n.a.	n.a.
11	Nepal	9.7	451	76.9	7.3	27.8
12	Ghana	9.0	373*	144.5	6.7	10.4
13	Mali	8.2	91	106.8	6.4	19.7
14	Colombia	8.1	530	-34.8	7.1	12
15	Madagascar	8.1	160	201.9	7.8	18.6
16	Kenya	8.0	899	10.4	9.5	28.5
17	Burkina Faso	7.7	218*	194.6	5.1	3.4
18	Mozambique	7.4	n.a.	n.a.	n.a.	n.a.
19	Tanzania	7.4	501	227.5	10.4	13.9
20	Niger	6.5	50	138.1	3.6	11.1
21	Zambia	6.3	574	307.1	9.5	9.1
22	Venezuela	5.6	469	-10.7	7.6	12.5
23	Cameroon	5.4	n.a.	n.a.	4.2	11.6
24	South Africa	5.0	6001	483.2	6.9	5.7
25	Peru	4.3	1027	224.0	9.8	9.5
26	Zimbabwe	4.1	1868	208.8	5.6	7.3
27	Sierra Leone	3.2	10	-89.8	3.6	9.4
28	Yemen Republic	2.9	73	40.4	2.5	4.4
29	Senegal	2.8	369*	50	7.5	14.4
30	Ecuador	2.7	615	69.9	9.8	15.4
31	Central African Rep.	2.4	10*	66.7	4.1	3.1
32	Egypt	2.2	5116	112.2	10.6	26.1
33	Turkey	1.6	9587	99.8	9.5	18.5
34	Honduras	1.6	408	40.7	10.3	7.1
35	Lao PDR	1.5	300	2042.9	10.9	3.4
36	El Salvador	1.3	795	309.8	7.2	22.1
37	Sri Lanka	1.3	400	32.2	8.8	13
38	Thailand	1.2	9509	79.5	13.2	19.8
39	Bolivia	1.2	342*	34.7	8.5	13.4
40	Guatemala	1.1	823*	61.7	9.1	14.2
41	Paraguay	1.1	221	-21.1	8.5	2.6
42	Lesotho	0.9	186*	8.8	8.9	27.3
43	The Gambia	0.8	96*	-4	13.3	16.7
44	Mauritania	0.8	n.a.	n.a.	n.a.	n.a.
45	Algeria	0.6	866	-23.8	6.4	10.3
46	Morocco	0.6	4113	2.21	12.4	25
47	Namibia	0.6	560*	n.a.	13.2	11.7
48	Moldova	0.5	n.a.	n.a.	n.a.	n.a.
49	Côte d'Ivoire	0.5	n.a.	n.a.	4.1	3.2
50	Costa Rica	0.5	1106	154.3	13.2	18

* figures are for 1999 instead of 2000

Tourism to the Least Developed Countries (LDCs)⁸ collectively is still at a low level. In 2001 less than 1% of international arrivals world-wide were received in LDCs leading to approximately 0.5% of international tourism receipts. However, WTO/UNCTAD note that in these countries "tourism can make a substantial contribution to ... development ... and in combating poverty" (WTO/UNCTAD 2001:11). In 1998, tourism was a leading

³ World Bank database http://millenniumindicators.un.org/unsd/mi/mi_source_xrxx.asp?source_code=45

⁴ WTO (2001)

⁵ own calculations based on WTO (2001) data

⁶ WTTC database – supplied to authors by WTTC in February 2003

⁷ WTTC database – supplied to authors by WTTC in February 2003

⁸ Least Developed Countries currently contain 49 countries – 34 in Africa, 9 in Asia, 5 in the Pacific and 1 in the Caribbean. The following criteria are used to determine LDCs: a) a low national income (per capita GNI), b) a low level of human capital development (a composite index based on health, nutrition and education indicators), c) a high degree of economic vulnerability (a composite index based on indicators of instability of agricultural production and exports, inadequate diversification and economic smallness)

export sector for 31 LDC countries and it is the first source of export earnings in seven. Tourism receipts to LDCs more than doubled between 1992 and 1998, from \$1 billion to \$2.2 billion, with five countries: Cambodia, The Maldives, Nepal, Tanzania and Uganda capturing 51 per cent of the total. Apart from the petroleum exporting countries (Angola, Yemen and Equatorial Guinea) tourism is a primary source of foreign exchange earnings for all the others. Encontre (2001) argues that steady tourism development is likely to have a measurable socio-economic impact and can drive a Least Developed Country near the threshold of “graduation” (moving out of LDC status). He argues that five graduation cases in recent years (Botswana , Cape Verde, Maldives, Samoa and Vanuatu) show a close association between tourism development and “the socio-economic progress that explains the context of proximity to, or realization of graduation” (Encontre 2001:108).

Table 2: The significance of tourism in countries with the highest proportions of poor people

Position	Country	Proportion of the population below US\$1/day (%) ⁹	International arrivals in 2000 ('000) ¹⁰	Growth in international arrivals 1990-2000 (%) ¹¹	Contribution of tourism economy to GDP in 1999 (%) ¹²	Tourism receipts as percentage of exports in 1999 ¹³
1	Mali	72.8	91	106.8	6.4	19.7
2	Nigeria	70.2	813	327.9	2.7	10.9
3	Central African Rep.	66.6	10*	66.7	4.1	3.1
4	Zambia	63.7	574	307.1	9.5	9.1
5	Niger	61.4	50	149.48	3.6	11.1
6	Burkina Faso	61.2	218*	194.6	5.1	3.4
7	The Gambia	59.3	96*	-4	13.3	16.7
8	Sierra Leone	57	10	-89.8	3.6	9.4
9	Madagascar	49.1	160	201.9	7.8	18.6
10	Ghana	44.8	373*	155.5	6.7	10.4
11	India	44.2	2641	54.7	4.9	8.7
12	Lesotho	43.1	186*	8.8	8.9	27.3
13	Mozambique	37.9	n.a.	n.a.	n.a.	n.a.
14	Nepal	37.7	451	76.9	7.3	27.8
15	Zimbabwe	36	1868	208.8	5.6	7.3
16	Namibia	34.9	560*	n.a.	13.2	11.7
17	Cameroon	33.4	n.a.	n.a.	4.2	11.6
18	Ethiopia	31.3	125	58.2	6.3	26.2
19	Pakistan	31	543	28.1	5.1	10.4
20	Bangladesh	29.1	200	73.9	3.4	2.1
21	Mauritania	28.6	n.a.	n.a.	n.a.	n.a.
22	Kenya	26.5	899	10.4	9.5	28.5
23	Senegal	26.3	369*	50	7.5	14.4
24	Lao PDR	26.3	300	2042.9	10.9	3.4
25	Honduras	24.3	408	40.7	10.3	7.1
26	Venezuela	23	469	-10.7	7.6	12.5
27	El Salvador	21	795	309.8	7.2	22.1
28	Ecuador	20.2	615	69.9	9.8	15.4
29	Tanzania	19.9	501	227.5	10.4	13.9
30	Colombia	19.7	530	-34.8	7.1	12
31	Paraguay	19.5	221	-21.1	8.5	2.6
32	China	18.8	31229	197.9	9.8	10.4
33	Mexico	15.9	20643	20.2	10.4	19.3
34	Yemen Republic	15.7	73	40.4	2.5	4.4
35	Peru	15.5	1027	224	9.8	9.5
36	Bolivia	14.4	342*	34.7	8.5	13.4
37	Panama	14	479	123.8	15.5	7.1
38	Mongolia	13.9	158	7.5	n.a.	n.a.
39	Costa Rica	12.6	1106	154.3	13.2	18
40	Trinidad and Tobago	12.4	336*	72.3	10.7	17.5
41	Côte d'Ivoire	12.3	n.a.	n.a.	4.1	3.2
42	Turkmenistan	12.1	n.a.	n.a.	n.a.	n.a.
43	Brazil	11.6	5313	387	7.6	8.3
44	South Africa	11.5	6001	483.2	6.9	5.7
45	Moldova	11.3	n.a.	n.a.	n.a.	n.a.
46	Guatemala	10	823*	61.7	9.1	14.2
47	Armenia	7.8	30	n.a.	n.a.	n.a.
48	Indonesia	7.7	5064	132.5	9.8	12.9
49	Russian Federation	7.1	21169	n.a.	n.a.	n.a.
50	Sri Lanka	6.6	400	34.2	8.8	13

* figures are for 1999 instead of 2000

⁹ World Bank database http://millenniumindicators.un.org/unsd/mi/mi_source_xrxx.asp?source_code=45

¹⁰ WTO (2001)

¹¹ own calculations based on WTO (2001) data

¹² WTTC database – supplied to authors by WTTC in February 2003

¹³ WTTC database – supplied to authors by WTTC in February 2003

Table 3: The significance of tourism in countries with the lowest per capita GNI

Position	Country	GNI ¹⁴ per capita in 2001 ¹⁵ (US\$)	International arrivals in 2000 ('000) ¹⁶	Growth in international arrivals 1990-2000 (%) ¹⁷	Contribution of tourism economy to GDP in 1999 (%) ¹⁸	Tourism receipts as percentage of exports in 1999 ¹⁹
1	Congo Dem. Rep	80	n.a.	n.a.	8.1	8.4
2	Burundi	100	30	-72.5	4.2	7.4
3	Ethiopia	100	125	58.2	6.3	26.2
4	Liberia	140	n.a.	n.a.		
5	Sierra Leone	140	10	-89.8	3.6	9.4
6	Eritrea	160	70	n.a.	n.a.	n.a.
7	Guinea-Bissau	160	n.a.	n.a.	n.a.	n.a.
8	Malawi	160	228	75.4	2.4	10.1
9	Niger	180	50	138.1	3.6	11.1
10	Tajikistan	180	n.a.	n.a.	n.a.	n.a.
11	Chad	200	44	388.9	8.2	16.7
12	Mozambique	210	n.a.	n.a.	n.a.	n.a.
13	Burkina Faso	220	218*	194.6	5.1	3.4
14	Rwanda	220	n.a.	n.a.	3.4	8.6
15	Mali	230	91	106.8	6.4	19.7
16	Nepal	250	451	76.9	7.3	27.8
17	Central African Rep.	260	10*	66.7	4.1	3.1
18	Madagascar	260	160	201.9	7.8	18.6
19	Uganda	260	151	118.8	6.4	3.2
20	Cambodia	270	466	2641.2	8.4	9.9
21	Tanzania	270	501	227.5	10.4	13.9
22	Togo	270	60	-41.8	1.7	9.6
23	Kyrgyz Republic	280	69*	n.a.	n.a.	n.a.
24	Ghana	290	373*	155.5	6.7	10.4
25	Nigeria	290	813	327.9	2.7	10.9
26	Lao PDR	300	300	2042.9	10.9	3.4
27	The Gambia	320	96*	-4	13.3	16.7
28	Zambia	320	574	307.1	9.5	9.1
29	Sudan	340	50	51.5	5.8	7.3
30	Kenya	350	899	10.4	9.5	28.5
31	Bangladesh	360	200	73.9	3.4	2.1
32	Mauritania	360	n.a.	n.a.	n.a.	n.a.
33	Moldova	400	n.a.	n.a.	n.a.	n.a.
34	Mongolia	400	158	7.5	n.a.	n.a.
35	Guinea	410	33	n.a.	4	4.4
36	Vietnam	410	2140	756	6.9	8.9
37	Pakistan	420	543	28.1	5.1	10.4
38	Yemen Republic	450	73	40.4	2.5	4.4
39	India	460	2641	54.7	4.9	8.7
40	Haiti	480	143	-0.7	4.9	21.6
41	Zimbabwe	480	1868	208.8	5.6	7.3
42	Senegal	490	369*	50	7.5	14.4
43	Angola	500	51	-23.9	6.7	4.8
44	Lesotho	530	186*	8.8	8.9	27.3
45	Uzbekistan	550	n.a.	n.a.	n.a.	n.a.
46	Armenia	570	30	n.a.	n.a.	n.a.
47	Cameroon	580	n.a.	n.a.	4.2	11.6
48	Papua New Guinea	580	58	41.5	10.6	6.5
49	Georgia	590	384*	n.a.	n.a.	n.a.
50	Côte d'Ivoire	630	n.a.	n.a.	4.1	3.2

* figures are for 1999 instead of 2000

¹⁴ Gross national income (GNI) is the sum of value added by all resident producers plus any product taxes (less subsidies) not included in the valuation of output plus net receipts of primary income (compensation of employees and property income) from abroad. GNI per capita is gross national income divided by mid-year population. GNI per capita in US dollars is converted using the World Bank Atlas method.

¹⁵ World Bank database http://millenniumindicators.un.org/unsd/mi/mi_source_xrxx.asp?source_code=45

¹⁶ WTO (2001)

¹⁷ own calculations based on WTO(2001) data

¹⁸ WTTC database – supplied to authors by WTTC in February 2003

¹⁹ WTTC database – supplied to authors by WTTC in February 2003

Table4: Classification of the Least Developed Countries according to the importance of the tourism sector in their economy (tourism as a percentage of total exports / tourism economy as percentage of GDP in 1998)

LDCs with a prominent tourism sector in 1998		LDCs with a less prominent tourism sector in 1998		LDCs without significant tourism activity in 1998	
Countries for which tourism is the first export sector	Countries for which tourism is second or third export receipt earner	Countries with a less prominent tourism sector but demonstrating significant growth in their tourism performance		Countries hosting little tourism and not demonstrating significant progress in their tourism performance	
Comoros (31.3 / 14.0)	Benin (9.5/5.0)	Bangladesh (3.7/3.3)		Afghanistan (N/A/NA)	
Gambia (15.2 / 12.0)	Cambodia (12.4/8.0)	Bhutan (N/A/NA)		Angola (6.9/8.4)	
Maldives (71.6/86.9)	Cap Verde (41.8/12.0)	Burkina Faso (4.8/5.0)		Burundi (5.4/3.6)	
Samoa (na/NA)	Haiti (14.8/5.1)	Ethiopia (11.7/5.8)		Central African Republic (11.2/4.1)	
Tuvalu (na/NA)	Lao (18.3/10.4)	Malawi (7.5/2.7)		Chad (30.4/5.9)	
Tanzania (49.5/9.4)	Lesotho (16.8/8.6)	Mali (13.2/6.3)		Congo (9.4/8.4)	
Vanuatu (43.8/39.7)	Madagascar (18.3/7.7)	Mauritania (NA/ NA)		Djibouti (NA/NA)	
	Nepal (21.1/7.5)	Myanmar (53.0/6.4)		Equatorial Guinea (NA/NA)	
	Sao Tome & Principe (18.3/7.9)	Yemen (10.2/2.9)		Eritrea (NA/NA)	
	Senegal (14.8/7.8)	Zambia (17.8/8.7)		Guinea (1.4/3.8)	
	Uganda (24.2/6.1)			Guinea-Bissau (NA/NA)	
				Kiribati (16.0/21.0)	
				Liberia (NA/NA)	
				Mozambique (NA/NA)	
				Niger (13.7/3.3)	
				Rwanda (20.2/3.6)	
				Sierra Leone (6.2/3.5)	
				Solomon Islands (5.1/6.3)	
				Somalia (NA/NA)	
				Sudan (3.6/5.5)	
				Togo (4.1/ 2.3)	

Source: WTO/UNCTAD (2001)

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Pro-Poor Tourism Partnership:
 ICRT - Harold Goodwin; IIED - Dilys Roe; ODI - Caroline Ashley.
 Website: www.propoortourism.org.uk
 Contact us at: info@propoortourism.org.uk

Sheet No. 8: Policy instruments supporting Pro-Poor Tourism

This PPT Information Sheet is intended to highlight the role of government in maximising the poverty impact of tourism. It is true that tourism is an industry that is driven by the private sector, however there is much that governments can do to shape the way in which it develops and a number of different policy measures that can be used at different levels to enhance its impacts on the 'poor'.

National policy framework

It is not just tourism policy that influences the development of the industry in any particular destination – in fact, many countries where tourism occurs do not have a tourism policy. Tourism influences and is influenced by broader economic development strategies and sectoral policies. Ensuring the national policy framework supports Pro-Poor Tourism requires:

- Regional economic policies, rural regeneration policies, and local land-use planning that include a realistic assessment of the potential for tourism, and identified ways to develop it at priority sites. Devolution of rights and revenue fees across levels of government that provide incentives, not discouragement, for councils and local bodies to invest in tourism.
- A national economic policy framework that includes realistic assessment of comparative advantages of tourism.
- Coherence and effective institutional linkages between the tourism ministry or division and economic development ministries.

Poverty reduction strategies and other elements of a poverty programme that address how to make the structure of national growth more pro-poor, and increase investment in Pro-Poor Tourism measures are reported in Info-sheet No 9.

Land policy in particular is critical. Communities with secure land tenure are in the strongest position to manage tourism on their land and gain the lion's share of benefits. Pro-Poor Tourism case studies have shown that "extent to which economic empowerment of local communities takes place is intricately linked to the nature and extent of the land rights of those rural communities." (see Pro-Poor Tourism Strategies: Making Tourism Work For The Poor, PPT Report N. 1, p. 42, 2001).

Land ownership, while desirable, is not essential – there are a number of institutional arrangements whereby communities can gain rights over tourism resources without necessarily owning land. The apparent fluidity of land tenure can be as important as the current status, as uncertainty deters private investment. A PPT case study in South Africa notes "for investors, the perceived risk of investing in areas with unclear land rights is high. Investors price for this risk which may impact on the anticipated financial returns from the project and thus benefit flows to the community" (see Practical strategies for Pro-Poor Tourism. Case studies of Makuleke and Manyeleti tourism initiative, PPT Working Papers N.2, p. 44, 2001).

Tourism Policy and Planning

Appropriate regulations: Good policy must be followed up by good implementation, and this means the development of tourism regulations that (i) do not discourage development unnecessarily; (ii) are not biased against the poorer (and less well-connected entrepreneurs); and (iii) maximise opportunities to encourage or require operators to incorporate pro-poor measures into their business practice (e.g. regulations that grade and classify accommodation or licensed guides should include the more basic categories).

Pro-poor planning: There are a number of specific policy tools that national and local governments can use to maximise poverty impacts. These include:

- setting tourism development objectives that include the goals of stimulating local economic development;
- product development plans that include rural/ cultural/ adventure/ community tourism, or other products suitable to development in poorer areas and by small-scale entrepreneurs and for which there is a defined market;
- using tourism planning procedures that include consultation, and influence siting to increase physical access of the poor to tourism markets, infrastructure and services;
- including pro-poor criteria in concession or licensing procedures for access to sites within protected areas, wildlife quotas, or other tourism development sites.

Wildlife management: Many poor countries are rich in biodiversity and their tourism industries revolve around wildlife viewing and ecotourism. However, wildlife conservation - particularly where it is associated with protected areas based on the exclusion of local people – can have a negative impact on poverty. Pro-poor approaches to conservation that deliver on poverty reduction objectives include:

- Conservation strategies that embrace the need for overall sustainability but within that exploit the economic potential of sustainable use of wildlife.
- Management of national parks and game reserves in ways that seek to build linkages with surrounding areas and entrepreneurs – through the use of local transport infrastructure, procurement of local supplies for services within park boundaries, providing marketing and/or operational sites for local businesses (taxis, crafts), two-way flow of information, and expectations of how park staff and any private concessionaires operate.
- National strategies that *harness* the international conservation agenda and the flow of funds for international public goods for the benefit of local economic development.
- Analysis of the opportunity costs of setting productive land aside for wildlife conservation and of how tourism revenue affects the trade-off.

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ICRT - Harold Goodwin; IIED - Dilys Roe; ODI - Caroline Ashley.
Website: www.propoortourism.org.uk
Contact us at: info@propoortourism.org.uk

Sheet No. 9: Tourism in Poverty Reduction Strategy Papers (PRSPs)

Poverty Reduction Strategy Papers (PRSPs) describe a country's macroeconomic, structural and social policies and programmes to promote growth and reduce poverty. Many developing countries that have produced these strategies have included tourism amongst the economic sectors expected to contribute to poverty reduction. Some countries that highlight tourism are not those readily associated with the industry, including Bangladesh, the Central African Republic, Sierra Leone and Guinea – but they had still identified tourism as an important sector. There are however considerable differences between countries in the role that they see for tourism.

It is important that government officials as well as others are educated about the potential role of tourism in economic development and poverty reduction. Tourism can generate different types of local cash income from wages from formal employment, casual labour and earnings from selling goods; dividends from profits arising from locally owned enterprises; and collective income: this may include profits from a community run enterprise, dividends from private-sector partnership and land rental paid by an investor. (Cambodia PRSP)

For most, the focus is on the macro-economic benefits of tourism including: employment, economic growth/GDP contributions, foreign exchange earnings and private sector investment.

While these might seem laudable objectives, research has demonstrated – and it is generally accepted – that poverty reduction requires more than these macro-level impacts. It is not just growth that is needed, but growth that specifically benefits poor people – pro-poor growth. A significant number of PRSPs do talk about tourism as contributing to pro-poor

growth while others identify issues that have been noted in PPT research as important strategies for Pro-Poor Tourism. These include an emphasis on the development of, and support to, small enterprises, linkages with other economic sectors – particularly agriculture and fisheries, the importance of minimising or mitigating negative environmental impacts and the enhancement of local culture. Within the focus on employment, there is also an acknowledgement of the importance of local jobs. Some countries include very explicit elements of Pro-Poor Tourism:

The growth in demand for locally-produced goods and services is an important factor for raising incomes of local producers...The tourism sector has the potential to contribute to this increase in demand, covering also small producers and communities (Mozambique PRSP)

- Cambodia notes the importance of tourism as a source of non-wage income as well as formal salaries;
- Malawi emphasises the benefits tourism can bring to poor people in the form of improved infrastructure, enhanced security, off-farm diversification;
- Mozambique highlights the role tourism has to play in stimulating the use of local goods and services;
- Nepal sees tourism as a good mechanism for rural diversification;
- Yemen encourages tourism but notes the potential conflicts that can arise as a result and stresses the need to maintain local access to natural resources such as fisheries;
- Zambia includes amongst the benefits of tourism training, local involvement, and integration of the informal sector.

An example of a country emphasising Pro-Poor Tourism in its PRSP is Yemen. In the PRSP it highlights the potentially negative environmental impacts of tourism and the need to ensure that access to natural resources - such as water, fisheries and so on - for local people is maintained. It also stresses the need for community involvement, training and capacity building the importance of domestic as well as international tourism. The Tourism Policy by contrast simply focuses on the promotion of tourism in the international market place.

The majority of countries mentioning tourism in their PRSPs also have a sectoral tourism policy - although there is little cross-referencing between the two. However, a number of countries which stress tourism as a form of pro-poor growth in their PRSPs do not back this up in their sectoral policies and plans. Meanwhile, other countries which do not elaborate on tourism for pro-poor growth in their PRSP do emphasise this in sectoral plans. The Gambia, for example, pays only limited attention to tourism in its PRSP, identifying agriculture as the key sector that affects the majority of the country's poor. The Tourism Development Policy, however, emphasises the need for growth that contributes to socio-economic development. Tanzania and Uganda go even further, scarcely mentioning tourism in their PRSPs but developing national tourism policies whose primary focus is poverty reduction.

Governments have a critical role to play in setting the framework under which tourism develops and in shaping its impacts on poverty reduction (see Info Sheet No 8). However, experience to date with PRSPs demonstrates that the pro-poor potential of tourism is largely unrecognised and often poorly articulated. Maximising the potential of tourism to contribute to poverty reduction requires:

- Greater clarity on national priorities;
- Greater coherence - both between tourism policy and poverty reduction policy and within tourism between different policies, plans, regulations and so on;
- Better promotion and implementation of national policy to ensure that good policy is translated into good practice.

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Website: www.propoortourism.org.uk
Contact us at: info@propoortourism.org.uk

Sheet No. 10: International tour operators: roles, practices and implications for developing countries

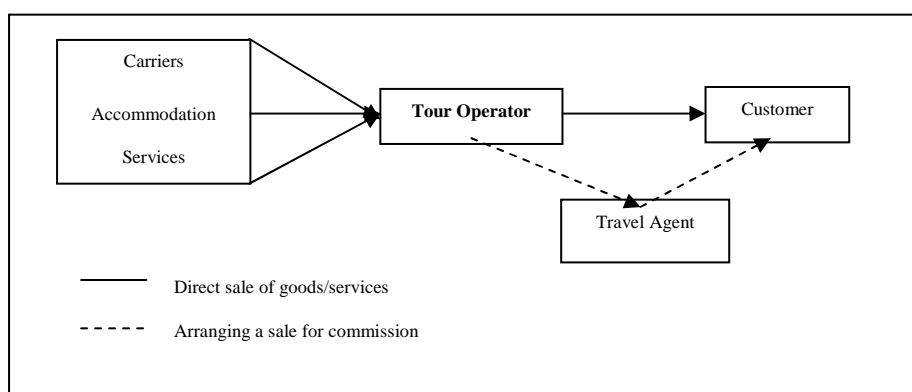
Tour operators based in the major originating markets affect the nature of tourism development and the impacts that this development has on 'poor' people. It is essential to understand the role of tour operators and the changing structure of the tourism industry in the *North*, to improve our knowledge of how pro-poor tourism strategies can be successfully implemented in developing countries. The aim of this PPT information sheet is to explain what tour operators are and how they operate. This, we hope, will help those based in Southern destinations that need to deal with them but are not familiar with the industry and its operating practices¹. Further explanation of some industry terms is in Sheet No. 11.

What does a tour-operator do?

Tour operators are businesses that combine two or more travel services (e.g. transport, accommodation, catering, entertainment, sightseeing) and sell them through travel agencies or directly to final consumers as a single product. A tour operator is thus a crucial link in the distribution chain, representing the central connection between customers and providers of tourism services, and thus has the power to influence both the demand and the supply side.

The product that a tour operator sells to customers is the 'package tour', i.e. the packaged combination of transport, accommodation and services. Due to bulk-buying the tour operator is able to offer this package at a cheaper price than the customer would have been able to achieve dealing directly with individual suppliers. This package is distributed to the customer either directly (e.g. via direct sell, internet) or via a 'middleman' (the travel agent) who arranges the sale of the package for commission, usually 10% of the retail price (see figure 1).

Figure 1: The role of the tour operator in the distribution chain



The importance of tour operators for the sale of holidays

The four main tourist-generating countries are - in order of size - the United States, Germany, Japan and the United Kingdom. Europe generates the most international tourists, and accounts for 12.5% of arrivals in developing countries (WTO 2001). Although there is a growing trend towards independently arranged travel, significant numbers of tourists still use the services of a tour operator to book their holidays. In the UK, for example, 28% of travel to developing countries (out of a total of 4 million UK tourists) was booked through tour operators in 2000 (Mintel 2001).

¹ for a more detailed discussion see Meyer, 'The UK Outbound Tour Operating Industry and Implications for Pro-Poor Tourism', PPT Working Paper No. 17, 2003

Characteristics of the tour operating industry

Two major trends characterise the tour operating industry in the UK:

- **Concentration and integration:** The package holiday market is dominated by a very small number of internationally operating tour operators. In the UK, for example, four tour operators (TUI UK, MyTravel, Thomas Cook and First Choice) control over 67% of all outbound package tours. The main trends in the industry are *economies of scale, horizontal and vertical integration*. Through these strategies, tour-operators can achieve considerable buying power and control over their suppliers, as well as the distribution of their products. Horizontal integration refers to a situation when companies join together with the aim to remove competition, to increase economies of scale, and to increase purchasing power. Horizontal integration comprises mergers at the same level in the tourism distribution or supply chain, i.e. mergers between different tour operating companies. Vertical integration implies the take-over or formation of businesses at different levels of the supply or distribution chain. For a tour operator this means investment into either suppliers through backward integration (e.g. accommodation, transport) and/or forward integration (e.g. travel agents). The main advantages are control over supplies in terms of quality, availability, access and price, and the ability to reach consumers. Vertical integration is a significant feature among the leading tour operators and has drastically increased in recent years. The four largest UK operators all own charter airlines, accommodation, ground-handlers and travel agents.
- **Specialisation:** Intense integration practices have also led to increased specialisation and the development of niche operators and niche products. Small and medium size operators have to compete with larger, integrated companies. As vertically integrated operators capture a large proportion of mainstream package holidays, independent operators (also sometimes vertically integrated) increasingly focus on specialisation. Independent tour operators compete by providing high quality, specialist and tailor-made services, which is responding to the trend that holidaymakers are becoming more discerning about the holidays that they take. They often specialise in geographical areas or activities. Table 1 summarises the differences between “mainstream” and “niche” operators.

Table 1: Mainstream and niche (or independent) tour operators

Mainstream tour operators	Independent tour operators
<ul style="list-style-type: none"> • Carry high volumes of tourists. • Have now adopted formerly 'off the beaten track' destinations. More destinations in developing countries are available to more customers. • Apply their marketing powers to destinations where they operate. • Generally operate on low margins and high volumes. Any swings in consumer demand can lead to capacities being cut with devastating effects for destinations. • Continue to sell mainly on price. Thus loyalty to specific tour operators or to destinations is very low. • Serve customers that are highly price-sensitive and low spending. The bottom end of the market is the first to fall off should a price increase in the host country occur. In recent years all-inclusive developments, and thus the manageability and predictability of holiday expenditure, have become increasingly attractive to this segment. • Tend to channel their clients and market their destinations through travel agents that they own. High Street travel agents remain the first choice for consumers seeking package holidays. • Focus on a relatively standardised and basic product (sun, sand and sea), with little interest in destination specific products and attributes. • Carry large volumes and have thus considerable power in tourism destinations dependent on them for visitors. • Are now introducing less standardised and more tailor-made holiday options, reflecting changing consumer demands and offering possibilities for local suppliers. • Are in full control over their demand and supply structures due to vertical integration, leaving little influence to destinations themselves. • Are frequently preferred trading partners for local suppliers because of the volumes they provide. 	<ul style="list-style-type: none"> • Carry relatively small volumes • Often serve 'of-the-beaten-track' destinations to a fast growing consumer segment that desires tailor-made and high quality tourism products. • Are increasing their specialisation and have adopted niche products in order to distinguish themselves from inexpensive mainstream operators. • Serve consumers that are less price-sensitive, and higher spending customers. Interest in ethical products is growing and customers interested in ethical tourism are often the better-off, sophisticated travellers, using independent and niche tour operators rather than mainstream. • Generally do not use integrated High Street travel agents, but independent agents and direct-sell. Technological advances, in particular the internet, are expected to have largely advantageous impacts on niche operators. • Are highly dependent on local supplies, to the point that this is often their unique selling proposition. They provide a more complex and less standardised product, one that goes beyond simply providing accommodation and transport, by focusing on destination characteristics and inputs. • Tend to have established long term relationships with their suppliers in the destinations and to adopt a partnership approach. • Generally pay higher prices to local suppliers due to the low volumes they purchase.

As for any company, the commercial objective of tour operators is profit maximisation. A key feature of the mainstream operators are very low profit margins (on average 2-3% of the total revenue after all expenditures are paid), and thus the large companies focus on increasing market-share, i.e. increasing the volume of passengers carried, by selling on price and serving an extremely price sensitive market. Mainstream tour operators seek to maximise profits in three ways:

Minimise costs of the packages that they put together through bulk buying, owning suppliers, providing a basic product, i.e. accommodation and transport, while additional services are being sold as add-ons (e.g. excursions), and extremely tight yield-management

- Maximise revenue by maximising the volume of sales to make up for low profit margins and price-sensitivity of the mainstream market. Given the relatively fixed costs of operating in a destination and a perishable product, avoiding being left with unsold packages is essential, even if this means selling under cost price – i.e. a concentration on bums-on-seats.
- Pricing strategies are an essential tool for tour operators in the UK but price increases can only be used in a very limited way, within this very competitive and price sensitive market. Pricing strategies, i.e. discounts, are used to lure consumers into shops and to persuade them to buy early, thus allowing tour operators to get rid of excess capacity as early as possible and to earn interest on deposits made on holidays to be taken months later.

Influence of large tour operators

By the nature of their role and the sheer volume of their operation, large tour operators influence many aspects of tourism development and impact:

Image creation: Given the fact that selling a tourism product depends largely on imagery, the marketing and distribution channels that bring customers and suppliers together play a crucial role. The image of the product is created by the tour operators' promotional activity at home in generating areas, frequently with very limited destination input.

Customer demand: tour operators have direct access to the clientele. As the bulk of package holidays are sold through travel agents belonging to vertically integrated tour operators, they are providing the images, information and options upon which customer awareness, demand, and buying behaviour are based. This enables them to open new destinations and grow them rapidly.

Product price: With many destinations offering a similar product and being marketed in a similar way, price is a major decision making factor for consumers. Package holidays are often deliberately priced low in order to generate high demand.

Size, path and type of tourism: The major benefit provided by mainstream tour operators to developing countries is that they can significantly increase the volume of tourist arrivals, ideally leading to employment generation, export earnings and economic development. However, this also affects the nature of the destination. High volumes are achieved by providing low cost holidays through economies of scale, bulk-buying, and low input prices. The first element, high volumes, does not go without the other, low prices, and vice versa. However, there are trade-offs. High volumes of price-sensitive, low spending customer groups are not always the most appropriate. If tourism is developed to meet the needs of mainstream customers, it makes it more difficult to invest in more diverse areas and products, which may have greater involvement of poor and small-scale producers.

Government strategy in destination. Governments may rely on multinational companies to develop tourism in a particular destination, and in return offer financial incentives, assistance in terms of marketing, access to slots and routes for airlines, or commitments to fund infrastructure investments. Eagerness to attract investors and operators can conflict with a government's adoption of measures that encourage pro-poor behaviour by

companies and which may make the destination less attractive to smaller operators and other market segments which may be more pro-poor.

Contractual arrangements with suppliers: Tour operators are able to offer highly competitive prices to their customers because of their ability to bulk-buy supplies at low cost. For local suppliers (e.g. hoteliers, excursion-providers), the high volume and relative security of contracts from tour operators is attractive. However, the need to secure these contracts and operate at low prices can make it difficult for local providers to invest in a differentiated product or allocate extra resources to pro-poor commitments. The reliance of the larger operators and their local staff on earnings from excursion programmes can create conflict with other suppliers – often poor producers – of sightseeing and activities.

Linkages and market opportunities for locally-provided services: there is little incentive for large tour operators to expand access for local entrepreneurs, where they are selling a standardised product in which security and familiarity are more important to the customer than local flavour. The EU Package Travel Directive further encourages operators to encourage their clients to use the operators' own excursions and to stay within the confines of the products over which the originating market operators have control. Furthermore, tour operators often earn important revenue from their own sale of excursions, which would be undercut by promoting services sold by local businesses.

Leakage of expenditure: 'Leakage' refers to tourism payments that never reach the destination - because they pay for services of companies in the originating or other off-shore country – or that leave the destination to pay for imported goods. A general consensus has been that leakages are higher if integrated Northern tour-operators are involved rather than locally-owned enterprises. This relates to the fact that integrated companies frequently own the main elements of the package holiday, i.e. transport and accommodation. However, this does secure higher levels of FDI for poor countries.

Small operators have a less dramatic influence on tourism volumes, but can still significantly affect the path of development by putting a new area or new type of product on the map. Part of their product appeal is frequently a destination focus and the inclusion of local products, and they are less likely to own downstream operations. Thus independent operators rely more on destination inputs and can provide important markets for local products. They are more focused on enhancing product quality rather than price competition, and can also often have a more balanced relationship with suppliers due to the product characteristics and volumes generated.

Implications for implementing Pro-Poor Tourism (PPT) in developing countries

A boost to growth? The expanding range of developing countries featured in tour operator packages has potential to boost tourism growth rates in poor countries.

Implementation of PPT by destination stakeholders: the behaviour of a destination government and local suppliers will be influenced by their need to attract or maintain tour operators. If this need is high, this may then constrain their interest or ability to invest in PPT measures

Adoption of PPT by tour operators themselves: One of the reasons why it is often difficult for tour operators to implement PPT strategies themselves, is that they operate through the 'supply chain' and thus have limited direct control over PPT activities or initiatives undertaken by local companies that could have the potential to benefit the poor. The extent to which a tour operator has the options to implement PPT strategies within a developing country depends on what they own and do. A tour operator that owns accommodation, transport and ground handling services is much more able to adapt core business practice than one who only purchases from other suppliers. Similarly, practices of a mainstream operator will be quite different from those of a niche operator, given their product appeal and market position. In discussions with mainstream tour operators, three reasons are often given for their reluctance to encourage pro-poor practice by their suppliers: (1) their lack of responsibility for poverty reduction in destinations; (2) the EU package travel directive requiring strict

compliance with consumer protection laws; and (3) the competitive environment in which they operate. Smaller and speciality operators often have partner style relationships with their suppliers and see that they have more to gain by positive engagement.

Corporate Social Responsibility (CSR) and ethical issues have until recently largely been neglected by tour operators. Although there are now a number of initiatives and many tour operators, pride themselves with having adopted sustainable tourism principles, the tour operating sector lags behind other components of the tourism industry – for example the corporate hotel sector. The reason for this is the role of tour operators as mediators. Apart from the mainstream operators very few tour operators actually own suppliers and they do not recognise any direct responsibility for the sustainability of the product in the destination, this is seen as the responsibility of the government in the destination.

Summary

Tourism development at the destination level is strongly influenced by tour operators. Tour operators create the image for a destination that is used in promotional activities at home. They can put a destination onto the map or divert tourists to elsewhere. The big difference in the market position and operating behaviour of mainstream and independent tour operators makes it difficult to generalise about the impact of these structures on developing countries.

Mainstream operators are crucially important for a large number of destinations, simply because of the volumes they bring and business that they generate. They have considerable influence over the whole tourism experience due to their economies of scale and volume planning, image creation, destination contracting, types of excursion offered, nationality of overseas staff and pricing policy. Independent operators often provide a far less significant economic contribution, but, as has been argued, they are often more amenable to PPT measures.

There are several constraints to the implementation of Pro-Poor Tourism:

- Image creation for a destination is done in generating countries often with limited destination input. The holiday product is designed and distributed by tour operators in generating countries.
- Mainstream products are sold on price and only a very small price increase might lead to customers looking for alternative products. Because mainstream operators sell a product, rather than a destination, destinations become interchangeable.
- Developing countries with a high volume of tourists supplied via a small number of mainstream tour operators are highly dependent on these operators. Maintaining these relationships can become a dominant policy objective that constrains other developmental objectives.
- Similarly, suppliers in the South are often dependent on tour operators that can offer large-scale, relatively secure contracts. This can limit opportunities for other forms of tourism development based on independent travellers or smaller specialist operators.

On the other hand, the structure of the tour operating industry also offers great potential for more encouragement of PPT practices.

- Tour operators have great potential to influence both their customers as well as suppliers and host destination governments to adopt PPT practices – this potential should be built up through continuous engagement with the private sector.
- The current interest of mainstream tour operators in sustainable tourism practices offers potential to introduce industry-wide best PPT practice.
- The increasing specialisation of niche operators offers potential for local economic development and positive poverty impacts to be used as a product enhancement, similar to sustainable and responsible tourism initiatives in the past few years.

References:

Mintel (2001) *Long-haul Holidays*, Mintel International Group Ltd, February 2001

World Tourism Organisation (WTO) (2001) *Compendium of Tourism Statistics*, 2001 Edition. Madrid: World Tourism Organisation

These Pro-Poor Tourism Info-Sheets are produced by the Pro-Poor Tourism Partnership, with funding from the UK Department for International Development (DFID). They were written by Caroline Ashley, Dorothea Meyer, Dilys Roe and Harold Goodwin, and draw on a number of PPT reports and products. The opinions expressed are those of the authors and are not necessarily those of DFID. While copyright rests with the PPT Partnership, we encourage you to re-produce and share these sheets with others, while ensuring the PPT Partnership is credited and informed.

Pro-Poor Tourism Partnership:

ICRT - Harold Goodwin; IIED - Dilys Roe; ODI - Caroline Ashley.

Website: www.propoortourism.org.uk

Contact us at: info@propoortourism.org.uk

Sheet No. 11: Key terms

The glossary of key terms is intended to help tourism professionals interested in poverty issues to understand some commonly used development terms, and to help development professionals interested in tourism to understand key tourism terms. In many cases each party uses jargon which is only understandable by those from the same profession. In other cases the same words are used by both parties but with completely different meanings. This sheet should help the two to speak the same language.

4S Holidays: Term for basic standard package holidays that generally include the Sea, Sand, Sun and Sex.

Bed night: Bed nights is frequently used as an alternative to arrival figures in statistical accounts of tourism. It uses the following formula: No of arrivals X average length of stay in nights.

Benchmarking: The practice of studying the methods of an acknowledged leader in an industry as a way of setting standards for one's own operation.

Bilateral donor: Government agency in one specific country that provides development assistance to a recipient country (cf "multilateral" donor which represents several countries – e.g. the World Bank, the EU).

Bucket shop: A bucket shop is any retail outlet dealing in discounted airfares (also frequently called: a *consolidator*).

Capacity: In a tourism context, capacity refers to the physical ability of a destination/hotel/airline to contain tourists – according, for example, to the number of seats, number of beds, availability of infrastructure, number of landing slots at an airport etc. In development terms, capacity refers to the ability of individuals or institutions to deal with specific issues. *Capacity-building* is a term that describes interventions designed to develop the ability of organisations and individuals to plan and deploy resources in order to achieve their changing objectives more effectively and efficiently.

Capital: In a tourism context, capital refers to the financial resources that are tied up in a particular tourism development. In a development context it is recognised that local people call on a number of different types of capital or assets including natural capital (wildlife, forests, lands etc); human capital (skills, knowledge etc), social capital (institutions, social networks, rights and responsibilities etc), physical capital (infrastructure etc) as well as financial capital. These five capitals together represent 'livelihood assets' are for the basis of any analysis of 'sustainable livelihoods' (see livelihood).

Carrying Capacity: The carrying capacity of a tourist area is the maximum number of visitors that a destination can accommodate without compromising its environmental, physical, economic and socio-cultural characteristics, and without reducing tourists' satisfaction. Generally four different types of carrying capacities are used: 1. physical, 2. psychological, 3. biological/ environmental/ ecological, and 4. social.

Charter airlines: Charter airlines are utilised to facilitate the movement of holiday makers on 'package tours' or 'seat-only' arrangements. Charter airlines offer ad hoc transportation services at low cost to holiday destinations which is achieved by minimising the ability of customers to alter flights; by flying at inconvenient hours and/or inconvenient airports; by reducing the space per passenger within aircrafts; by offering only elementary services; by generating high load factors (90% or more); and by not needing to operate against a fixed schedule. Many charter airlines are owned by tour operators.

Commoditisation: Refers to a long standing criticism related to tourism's impact on culture and art. Cultures are said to become commodities for financial transactions. Art, rituals are abbreviated, translated, taken out of context and made more colourful to appeal to a wider tourism audience, one that is generally not acquainted with the meaning and significance of the original version.

Community: Much has been written in development literature on the meaning of 'community' or 'local community' and there is no agreed definition. In some cases (and perhaps most commonly from a tourism perspective) the term is used to describe people who share a space – village, forest, etc; other uses describe community as a social structure or as a set of shared interests or norms. In the latter case, it is important to recognise that there may be many 'communities of interest' within a given geographic area rather than one homogeneous unit.

Computerised Reservation System (CRS): Any of several proprietary computer systems allowing real-time access to airline fares, schedules, and seating availability and offering the capability of booking reservations and generating tickets. CRSs were developed by airlines, many have now become independent and expanded to become Global Distribution Systems (GDS) offering a wide variety of travel services.

Concession: A shop or other place of business within a larger business area, (such as for example an airport or cruise ship), which has paid a fee in exchange for operating rights. Concession also refers to operating rights granted to safari operators in national parks and game reserves.

Consolidation: A business tactic in which a company concentrates its purchases with fewer suppliers to effect cost savings. It also describes the process in which an industry comes to be served by fewer and fewer suppliers as companies merge or succumb to bankruptcy and competitive pressures; the airline industry and the tour operating industry are prime examples.

Destination: Destination refers to the place to which a person is travelling. They can range from purpose-built resorts (e.g. Sandals Jamaica) or meeting complexes for business travellers (e.g. Sandton Convention Centre), to specific towns and cities (e.g. Paris, Prague), to whole regions (e.g. the Mediterranean, the Cape Winelands) or countries (e.g. Maldives, The Gambia).

Development Assistance: Financial resources ('aid') included in government budgets to provide support to developing countries. Sometimes referred to as Official Development Assistance (ODA).

Differentiation: In tourism marketing, product differentiation is a tool for gaining competitive advantages by creating a Unique Selling Propositions (USP) that differentiates the product from competing products.

Dispersion: Dispersal of tourism at the destination level aims to reduce central congestion and to benefit outlying areas by spreading visitor flows more widely.

Diversification: Diversification in tourism refers to a process by which new products are added to the product portfolio of a tourism business or destination in order to avoid over-dependence on a few, often highly competitive, products. In development, diversification is generally used in the context of "sustainable livelihoods" and refers to a conscious strategy to maintain several sources of livelihood support – e.g. agriculture plus some formal employment, plus market sales etc.

Domestic tourism: Tourism of resident visitors within the economic territory of the country of reference.

Economic displacement effect: The displacement effect describes the opportunity costs involved in tourism development such as transfer of labour from traditional industries to tourism; labour in/out migration; import of labour and related leakages; and opportunity costs of capital resources. It describes a process whereby tourism development substitutes one form of expenditure and economic activity for another.

Economic impacts: In the analysis of the economic impacts of tourism for a destination area, three economic impact measurements are generally used: firstly, direct economic impacts (the value of tourism expenditure less the value of imports necessary to supply these 'front-line' goods and services); secondly, indirect economic impacts (economic activity generated through subsequent rounds of expenditure); and thirdly, induced economic impacts (income that will accrue to local residents during direct and indirect rounds of expenditure such as wages, salaries, distributed profit, rent and interest).

Ecotourism: There is no single definition of ecotourism although it is generally agreed to include the following: a) Involves travel to natural destinations; b) Minimizes Impact; c) Builds environmental awareness; d) Provides

direct financial benefits for conservation; e) Provides financial benefits and empowerment for local people; f) Respects local culture; and g) Supports human rights and democratic movements.

Empowerment: Empowerment occurs where people take greater control over the social and institutional context that affects their livelihood.

Enclave: Enclave describes an area of a country, region or city that is occupied by people ethnically or culturally distinct from their neighbours. Enclave tourism often refers to geographically isolated and closed-off resorts containing all tourism facilities and services required by tourists, and thus encouraging them to stay inside and spend within the compounds of the enclave. This might include all-inclusive resorts where tourists prepay for food, beverage and services as part of the holiday price; (e.g. Club Med, Robinson Club) or entire destinations (i.e. Maldivian Islands). Enclaves used to be based predominantly in developing countries characterised by hostile, unwelcoming or insecure environments. In recent years, however, all-inclusive enclaves have become an important product and pricing strategy even in short-haul tourism destinations in Europe.

Excursion: A side trip, usually optional and at an additional cost, undertaken while on holiday. Excursions are organised by local 'ground handlers', often on behalf of tour operators from generating countries for whom the sale of excursions provides substantial additional income. Complementary products may include excursions and other activities offered by local companies. SMMEs and poor producers.

FDI Foreign Direct Investment

Franchise: A business contract in which an independent business (the franchisee) sells or markets the products and/or services of a larger firm (the franchisor). The franchisee receives training and marketing support from the franchisor and pays a fee for ongoing support. This is common in the accommodation and (fast-) food sector.

Global Distribution System (GDS): A computer reservation system (CRS), typically owned jointly by airlines in different countries, that includes reservation databases of suppliers in many countries. GDSs often combine independent CRSs and extend to car hire, accommodation etc.

Horizontal integration: Refers to a situation when producers join with the aim to remove competition, to increase economies of scale, and to increase purchasing power. Horizontal integration comprises mergers at the same level in the tourism distribution or supply chain, e.g. mergers between different tour operating companies.

Inbound Operator: A tourism operator that usually serves individuals/groups arriving from another country. Services can include transfers, excursions and extensions (also referred to as 'ground operator' or 'ground handler').

Inbound tourism: Activities of tourists inside the destination country (see outbound tourism). The country to which tourists travel is also called receiving country or host country.

Inclusive tour: A tour package that bundles transportation and lodging along with additional services such as for example transfers, sightseeing, museum admissions (see also package tour).

Independent tour: A tour that is not bought as a package from a travel agent or tour operators but is organised independently by the customer.

Investment incentives: Investment incentives provided by destination governments generally fall into three categories: a) incentives aimed at the reduction of capital costs (e.g. capital grants or loans at preferential rates, provision of land or infrastructure on favourable terms, tariff exemption on construction material etc); b) incentives aimed at the reduction of operating costs (e.g. tax holidays, labour or training subsidy, special depreciation allowances etc); and c) incentives aimed at providing investment security (e.g. guarantees against nationalisation, free availability of foreign exchange, provision of work permits for key personnel etc).

Livelihood: A livelihood is a combination of resources used and activities undertaken in order to live (see Capital). A livelihood is sustainable when it can cope with and recover from stresses and shocks and maintain or enhance its capabilities and assets both now and in the future, while not undermining the natural resource base.

Market Segmentation: Market segmentation is the categorization of potential buyers into groups based on common characteristics such as age, gender, income, and geography or other attributes relating to purchase or consumption behaviour.

Masterplan: A tourism masterplan is a comprehensive document detailing the guidelines for tourism development in a particular country or region. Master plans have been praised for providing public bodies with a stronger position to consider and control the private sector, while they also have been criticised for frequently being too rigid, inflexible and unrealistic.

Millennium Development Goals (MDGs): The MDGs are a set of human development targets agreed by world leaders at the United Nations Millennium Summit. They address a range of issues including poverty, hunger, child mortality, primary education, water and sanitation, environmental sustainability, and include the aim to halve the proportion of people living in poverty by 2015.

Multiplier: The multiplier is a numerical ratio which seeks to express the relationship between a unit of tourism expenditure and its wider impact in the economy. It is based on the recognition that sales for one firm require purchases from another within the local economy, i.e. the industrial sectors in an economy are interdependent. The following multipliers are frequently used: 1. transaction (or sales) multiplier (the additional business revenue created in an economy as a result in increase in tourism expenditure); 2. output multiplier (the amount of additional output generated in an economy as a result of an increase in tourism expenditure); 3. income multiplier (additional income created); 4. employment multiplier (either the total amount of employment generated by an additional unit of tourist expenditure or the ratio of the total employment generated by this same expenditure to the direct employment alone); and 5. government revenue multiplier (impact on government revenue, from all sources, associated with an increase in tourism expenditure).

Open skies: Referring to an agreement between two countries (or regions) allowing unrestricted air services between them.

Outbound Tour Operator: A company that takes individuals/groups from a given country to another country.

Outbound tourism: Tourism from one country into another (see also Inbound tourism). The country from which outbound tourism derives is also called the tourist-generating country.

Package Holiday: A package holiday is one that contains at least two elements (out of transport, accommodation, ancillary services), sold for a set price by a tour operator.

Participation: Participation refers to the involvement of key stakeholders in planning and decision making. It can range from passive participation (e.g. consultation, information sharing) to active participation (e.g. joint decision making, joint management etc).

Poverty: There is no agreed definition of poverty or how it should be measured. What may be considered poverty in one setting may be considered comparative wealth in another. At the international scale, the World Bank has defined poverty as an income of less than US\$1 per day. However, it is important to note that poverty is multi-dimensional and includes not just lack of income but lack of power, inequality, insufficient food, poor health etc.

Poverty Reduction Strategy Paper (PRSP): The World Bank is engaged in assisting developing countries in preparing Poverty Reduction Strategy Papers (PRSPs) through a participatory process involving civil society and development partners. PRSPs describe a country's macroeconomic, structural and social policies and programs to promote growth and reduce poverty, as well as associated external financing needs. PRSPs are to provide the basis for assistance from the World Bank and the IMF as well as many bilateral donors.

Pro-poor growth: Pro-poor growth can be broadly defined as one that enables the poor to actively participate in and significantly benefit from economic activity. This is to say the proportional income growth of the poor (however defined – e.g. the poorest 20% or the people below a national poverty line) must exceed the national average income growth rate.

Pro-poor tourism: Pro-poor tourism (PPT) is tourism that generates increased net benefits for poor people. It is not a niche or product.

Scheduled airline: An airline that flies to a regular and published timetable irrespective of load factor (number of seats filled). Services are generally more costly for the traveller compared to charter airlines, but scheduled airlines offer a wider range of destinations, more flexible tickets and cater for all flying needs with a great emphasis on business travel. Scheduled airlines' landing and take-off slot allocation and scheduling are given priority over charter airlines.

Seasonality: Seasonality refers to seasonal changes and differences. In a tourism context this refers to the periods of the year in which tourism in a particular destination is active often related to changes in climate over the calendar year (i.e. summer-sun or skiing holidays), but also related to the timing of work and school holidays in generating markets or special events in the destination. In a development context, seasonality is usually discussed in the context of livelihoods – e.g. agriculture-based livelihoods are busier at some times of the year and not others and this affects the amount of money and other assets that are available at any particular time of the year. Finding a combination of livelihood strategies with complementary seasonality (eg the busy period of one activity starts during the quiet period of another) is key to reducing the vulnerability of poor people.

Staged authenticity: It generally refers to tourists desiring a level of cultural penetration that is considered to be authentic by them, while the cultural heritage of the host society maintains its integrity by keeping tourists on the other side of a 'cultural safety curtain'.

Stakeholders: Stakeholders are groups of people who share a common interest and are somehow affected by an activity, either as beneficiaries or losers, either directly or indirectly. Stakeholders can be divided into two very broad groups: a) Primary stakeholders are those ultimately affected, either positively or negatively; and b) Secondary stakeholders are the intermediaries in the process. Related to tourism they are individuals/groups who have a vested interest in tourism development, including community members and local residents; NGOs; government officials; hotel owners, tour operators, guides, transportation providers, and representatives from other related services in the private sector.

Stakeholder analysis: Stakeholder analysis is a tool for identifying relevant stakeholders who are affected and/or affect a particular issue or system, their specific needs and views, and their relationships and power structures among them.

Sustainable development: Sustainable development is defined by the World Commission on Environment and Development as "development that meets the needs of the present without compromising the ability of future generations to meet their own needs"¹.

Sustainable tourism: In the widest and probably most idealistic sense sustainable tourism tries to achieve a balanced relationship between a) the environmental impacts, b) the socio-cultural impacts, and c) the economic impacts of tourism. The notion of sustainable tourism is however often associated with 'alternative development', which conceives development as a bottom-up, self-reliant, environmentally sound, equitable, people-centred, participatory, and locally focused process. In the past decade sustainable tourism has become mainstream and is being used by all sectors of the industry, frequently however focusing on environmental sustainability.

Tour Operator: Tour operators are businesses that combine two or more travel services (e.g. transport, accommodation, catering, entertainment, sightseeing) and sell them through travel agencies or directly to final consumers as a single product (called a package tour).

Tourism Gross Domestic Product (GDP): The percentage of the GDP generated by tourism is the sum of the value added (at basic prices) generated by all industries in response to internal tourism consumption, and the amount of net taxes on products and imports included within the value of this expenditure.

¹ World Commission on Environment and Development (1987) *Our Common Future*. Oxford: Oxford University Press.

Tourism: Tourism refers to both the activity of travel, as well as the industry based on such travel. Tourism is defined by the World Tourism Organisation as the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes. The tourism industry consists of all those firms, organisations and facilities which are intended to serve the specific needs and wants of tourists.

Tourist Area Life Cycle: The Tourist Area Life Cycle is a conceptual framework for analysing destination developments. Butler (1980)² argues that destinations pass through several life cycle stages (similar to a product life cycle). The stages are Exploration, Involvement, Development, Consolidation, Stagnation, Decline and possibly Rejuvenation.

Transaction costs: The costs associated with making, monitoring and enforcing agreements/transactions/contracts etc., a large proportion of which is associated with acquiring information about the nature of an agreement and reliability of other partners.

Travel agent: Any person who sells travel products and or services on a commission basis.

Vertical integration: Vertical integration implies the take over or formation of businesses at different levels of the supply or distribution chain. For a tour operator this means investment into either suppliers through backward integration (i.e. accommodation, transport) or distributors through forward integration (travel agents). The main advantages are control over supplies in terms of quality, availability, access and price, and the ability to reach consumers.

VFR: Visiting Friends and Relatives.

Visitor: Any person visiting a country (region/place) other than that in which he has his usual place of residence, for any reason other than employment. Visitors are divided into two groups: 1. tourists (making at least one overnight stop and staying for at least 24 hours), 2. excursionists (not making an overnight stop and staying for less than 24 hours, e.g. day-trippers, cruise passengers).

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Pro-Poor Tourism Partnership:
ICRT - Harold Goodwin; IIED - Dilys Roe; ODI - Caroline Ashley.
Website: www.propoortourism.org.uk
Contact us at: info@propoortourism.org.uk

² Butler, Richard W. 1980. The Concept of a Tourist Area Cycle of Evolution: Implications for Management of Resources. Canadian Geographer 24(1):5-12.

Sheet No.12: Pro-Poor Tourism – Projects

Since 2000, the Overseas Development Institute (ODI), the International Institute for Environment and Development (IIED) and the International Centre for Responsible Tourism (ICRT) have undertaken work (either individually or collaboratively as the Pro-Poor Tourism Partnership) ranging from analysis of case study experience of pro-poor tourism, to dissemination of findings through a PPT website and presentations. The main projects and products are:

1. Pro-Poor Tourism Strategies: Making Tourism Work for the Poor: A Review of Experience (2000 – 2001)

This is the first PPT partnership project funded through ESCOR, and it is also the one which had probably the most profound impact by discussing PPT strategies and their implementation using six highly diverse case study sites. The report brought together these case studies to formulate a wide range of PPT strategies that can be implemented on the ground (Ashley, C., Roe, D. and Goodwin, H. (2001) Pro-Poor Tourism Strategies: Making Tourism Work for the Poor. A Review of Experience, PPT Report No. 1 ODI, IIED, and CRT)

This report is at the moment the most frequently downloaded document on our website and it is also the one which receives the highest number of mention and links from other websites.

A summary brief of the report findings was produced that was targeted at policy makers (Ashley, C., Roe, D. and Goodwin, H. (2001) Pro-poor Tourism Strategies: Expanding Opportunities for the Poor. PPT Briefing No. 1. ODI, IIED, CRT)

Funded by: UK Department for International Development, Economic and Social Research Unit (ESCOR)

Implemented by: Pro-Poor Tourism Partnership

2. The Tourism Industry and Poverty reduction: A Business Primer (2002)

Outputs of the earlier PPT project (see under 1.) were designed for policy makers. In order to engage more effectively with the private sector, a new summary brief was written, especially tailored to tourism businesses (Ashley, C., Goodwin, H and Roe, D. (2002) The Tourism Industry and Poverty Reduction: A Business Primer.- poor tourism briefing No.2. ODI, IIED, ICRT)

A final draft of this brief was circulated among leading UK tourism businesses, and their comments were incorporated. In summer 2002, the brief was distributed among the UK travel using a leading trade magazine (Travel Trade Gazette – subscription 25,000). The brief was also distributed in selected developing countries.

Funded by: UK Department for International Development, Policy Research Programme

Implemented by: Pro-Poor Tourism Partnership

3. Lesson-Learning on Pro-Poor Tourism Strategies (2002 – 2003)

This follow-up ESCOR project, brings together a selection of newly commissioned PPT papers, each discussing PPT strategies and implementations from a more specific and focused angle. These include issues such as rural tourism development, local entrepreneurship, and tourism standards, among others. (PPT Working Paper 10-16, see Sheet No.14 for complete list).

Another component of this project is an assessment of impacts that the initial DFID-funded PPT case studies has had (Meyer, D. (2003) Strengths and Weaknesses of a Pro-Poor Tourism Approach, Results of a Survey to Follow-Up Pro-Poor Tourism Research Carried Out in 2000-2001. PPT Working Paper No. 9. ODI, London). The findings clearly show the value of PPT as a 'methodological', structured approach for assessing the impacts that tourism can have on the poor.

Funded by: UK Department for International Development, Social Science Research Unit

Implemented by: Pro-Poor Tourism Partnership

4. Engaging with the private sector on PPT (2002)

This short project focused on UK tourism operators and their role in PPT. It included production of a PPT paper analysing the UK outbound tourism industry and implications for developing countries (Meyer, D., 2003, Outbound UK Tour Operator Industry and Implications for PPT in Developing Countries. PPT Working Paper No. 17. ODI, London). The aim of the paper is to draw implications on how the outbound tour operating sector in Northern countries affects the potential for implementing PPT in the South. The project also provided for learning and sharing lessons about engaging with the private sector in tourism from a poverty/livelihoods perspective (Ashley, c. and Roe, D., 2003, Working with the Private Sector on Pro-Poor Tourism: Opinions and experience from two development practitioners, ODI, London). This draws on on-going engagement with the private sector via the UK's Sustainable Tourism Initiative (STI), and other work of the team.

Funded by: UK Department for International Development, Sustainable Livelihoods Support Office

Implemented by: Overseas Development Institute

5. The GAMBIA (September 2000 – April 2002)

The Association of Small Scale Enterprises in Tourism (ASSET) worked with the International Centre for Responsible Tourism on a series of participative surveys to collect information about the perceptions of the tourists, tour operators, hoteliers and inbound operators (or ground handlers). Each of the informal sector groups participated in the research phase and identified what they saw as the significant barriers to their participation in the industry and reported on their sales during the peak season (the first quarter) of 2001. An agenda for action was identified for each informal sector group, based on their understanding of the barriers that needed to be overcome in order that they could increase their sales and income. Discussions were held with government and the formal sector (hoteliers, ground handlers and the incoming operators) about what they could contribute to improving market access and the performance of the informal sector composed largely of poor producers. The project completed in April 2002 but there was subsequent work by the UK's Sustainable Tourism Initiative and by the Travel Foundation Industry Unit.

Reports on the project to April 2002:

Bah, A. and Goodwin, H. (2003) Improving Access for the Informal Sector to Tourism in The Gambia. PPT Working Paper No. 15. ODI, London

ICRT/NRET (2002) Harnessing Tourism for Poverty Elimination: A Blueprint from the Gambia www.nri.org/NRET/GambiaFinalSummaryReport2.pdf

Funded by: UK Department for International Development, Tourism Challenge Fund and with in kind contributions from the private sector in The Gambia

Implemented by: International Centre for Responsible Tourism, University of Greenwich

6. Pro-Poor Tourism Pilots in Southern Africa (2002 – 2005)

The vision of this programme is for the Southern African tourism industry to become a vibrant pilot of pro-poor tourism (PPT) strategies, and for commercial development of tourism in the region to be effectively harnessed for poverty reduction. The project's role is to provide the means by which Southern African tourism enterprises can expand their understanding and use of pro-poor tourism strategies.

The specific objectives of the programme are:

- a. The implementation of improved pro-poor practice by businesses at five tourism partner sites;
- b. The creation of networks of private sector companies, trade organisations and government bodies interested in stimulating, supporting and implementing PPT strategies across the Southern African region;
- c. The analysis, dissemination and adoption of PPT strategies and actions.

The five industry partners that the programme is working with are:

- Southern Sun,
- Sun City,
- Wilderness Safaris,
- Spier, and
- Ker & Downey, Tanzania.

More information can be found on the programme's website: www.pptpilot.org.za.

Funded by: UK Department for International Development, Business Linkage Challenge Fund

Implemented by: Overseas Development Institute and Mboza Tourism Projects

7. Pro-Poor Tourism Business Unit (August 2003 – August 2006)

This project aims to develop Pro-Poor Tourism capacity in the South by developing over a 3-year period a sustainable PPT business unit and resource centre that will work with the tourism sector in Southern Africa.

The aim is to keep the momentum and the interest in pro-poor tourism that currently exists in Southern Africa. The unit aims to work with a wide range of clients (private companies, trade organizations, NGOs, public bodies etc) to facilitate pro-poor tourism. The unit will build on the PPT Pilots in Southern Africa project by offering continuous support to partners and close cooperation with the networks that have in the past one-and-a-half years been established.

Funded by: UK Department for International Development, Business Linkage Challenge Fund

Implemented by: Overseas Development Institute and Mboza Tourism Projects

8. Getting The Lion's Share From Tourism (2000 – 2001)

An analysis of different types of partnership between communities and tourism companies in Namibia. The project included the development of a set of guidelines for communities and companies for the future development of partnerships.

Funded by: MacArthur Foundation, DANIDA and Sida

Implemented by: International Institute for Environment and Development and Wide Awake Leisure Management, in collaboration with the Namibia Community Based Tourism Association

9. Tourism In Poverty Reduction Strategy Papers (2003 – 2004)

An analysis of the extent to which tourism is addressed in PRSPs, and how it is addressed. The inclusion of tourism is analysed against the different strategies identified for pro-poor tourism.

Funded by: Norad

Implemented by: International Institute for Environment and Development

10. PPT Information Sheets (2003)

Funded by: UK Department for International Development, Policy Research Programme, and Norad

Implemented by: Pro-poor Tourism Partnership

11. PPT Information Dissemination

All of the reports produced by the PPT partnership has been widely disseminated, sending them out to targeted policy-makers and practitioners, and holding meetings. However, the main cross-project dissemination is via the PPT website.

The dissemination of PPT information has in the past year or so increased drastically. Visits to our www.propoortourism.org.uk website increased from 4,000 per month to over 18,000 per month. Additionally we have build-up a network of over 700 members interested and discussing PPT. These members are updated and kept informed with what is happening on a regular basis. The website is currently used predominantly as an information source as the high number of downloads can testify to.

Increasingly opportunities to raise the profile of PPT at presentations and meetings are being sought and created.

Implemented by: Pro-poor Tourism Partnership

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Website: www.propoortourism.org.uk
Contact us at: info@propoortourism.org.uk

Sheet No. 13: Publications in the Pro-Poor Tourism Series

PPT Reports

Pro-Poor Tourism Strategies: Making Tourism Work for the Poor. A Review of Experience, by Caroline Ashley, Dilys Roe, Harold Goodwin. PPT Report No 1 ODI, IIED, and CRT, April 2001.

Tourism in Poverty Reduction Strategy Papers: Experience from the Least Developed Countries. By Dilys Roe . PPT Report No 2 (Forthcoming)

PPT Briefings

Pro-poor Tourism Strategies: Expanding Opportunities for the Poor, by Caroline Ashley, Harold Goodwin and Dilys Roe . Pro-poor tourism briefing No 1. ODI, IIED, CRT. April 2001.

The Tourism Industry and Poverty Reduction: A Business Primer, by Dilys Roe, Harold Goodwin and Caroline Ashley. Pro-poor tourism briefing No.2. ODI, IIED, ICRT. March 2002.

PPT Working Papers

No 1. Practical Strategies for Pro-Poor Tourism: Wilderness Safaris South Africa: Rocktail Bay and Ndumu Lodge, by Clive Poultney and Anna Spenceley, 2001

No 2. Practical Strategies for Pro-Poor Tourism: Case studies of Makuleke and Manyeleti tourism initiatives: South Africa, by Karin Mahony and Jurgens Van Zyl, 2001

No 3. Practical Strategies for Pro-Poor Tourism: Case study of Pro-Poor Tourism and SNV in Humla District, West Nepal, by Naomi M. Saville, 2001

No 4. Practical Strategies for Pro-Poor Tourism: NACOBTA the Namibian Case Study, by Nepeti Nicanor, 2001

No 5. UCOTA – The Uganda Community Tourism Association: a comparison with NACOBTA, by Elissa Williams, Alison White and Anna Spenceley, 2001

No 6. Practical Strategies for Pro-Poor Tourism: Tropic Ecological Adventures – Ecuador, by Scott Braman and Fundacion Accion Amazonia, 2001

No 7. Practical Strategies for Pro-Poor Tourism: A Case Study of the St. Lucia Heritage Tourism Programme, by Yves Renard, 2001

No 8. Pro-Poor Tourism Initiatives in Developing Countries: Analysis of Secondary Case Studies, by Xavier Cattarinich. Report to PPT Project. ODI, IIED and CRT, London. 2001.

No 9. Strengths and Weaknesses of a Pro-Poor Tourism Approach, Results of a Survey to Follow-Up Pro-Poor Tourism Research Carried Out in 2000-2001, by Dorothea Meyer, 2003

No 10. Methodology for Pro-Poor Tourism Case Studies, by Caroline Ashley, 2003

No 11. Strategies, Impacts and Costs of Pro-Poor Tourism Approaches in South Africa by Anna Spenceley and Jennifer Seif, 2003

No 12. Tourism in Poor Rural Areas: Diversifying the Product and Expanding the Benefits in Rural Uganda and the Czech Republic, by Jenny Holland, Louise Dixey and Michael Burian, 2003

No 13. Coping with Declining Tourism, Examples from Communities in Kenya, by Samuel Kareithi, 2003

No 14. Addressing Poverty Issues in Tourism Standards, by Dilys Roe, Catherine Harris and Julio de Andrade, 2003

No 15. Improving Access for the Informal Sector to Tourism in The Gambia, by Adama Bah, and Harold Goodwin, 2003

No 16. Tourism and the Poor: Analysing and Interpreting Tourism Statistics from a Poverty Perspective, by Dilys Roe, Caroline Ashley and Sheila Page and Dorothea Meyer, 2004

No 17. Outbound UK Tour Operator Industry and Implications for PPT in Developing Countries, by Dorothea Meyer, 2003

Related Reports by PPT Partnership Members

Pro-Poor Tourism: Benefiting the Poor, by Dilys Roe, Harold Goodwin, Caroline Ashley. In *New Horizons in Tourism – Strange Experiences and Stranger Practices* (edited by TV Singh). CABI Publishing, Oxford, 2004

'Just Wildlife? Or a Source of Local Development?', by Caroline Ashley, and Jo Elliott, J., *Natural Resource Perspectives*, N. 85, London: ODI, 2003

Harnessing Tourism for Poverty Elimination: A Blueprint from the Gambia, Final Report to DFID, by Harold Goodwin and Natural Resources Institute, 2002

Pro-poor Tourism: Harnessing the World's Largest Industry for the World's Poor, by Dilys Roe and Penny Urquhart, World Summit on Sustainable Development Opinion, 2002

'Making Tourism Work for the Poor: Strategies and Challenges in Southern Africa' by Caroline Ashley, and Dilys Roe, in *Development Southern Africa*, Vol 19 No 1, March 2002, Basingstoke: Carfax Publishing, 2002

'Transforming Roles but not Reality? Private Sector Community Involvement in Tourism and Forestry Development on the Wild Coast', by Caroline Ashley and Zolile Ntshona, SLSA Wild Resource Theme Research Briefing, n. 1, 2002, Brighton: IDS

'Transformation or Tinkering? New Forms of Engagement Between Communities and the Private Sector in Tourism and Forestry in Southern Africa', by Ashley, C. and W. Wolmer, 2003, SLSA Research Paper 18, Brighton: IDS

Getting the Lion's Share from tourism: Private Sector-Community Partnerships in Namibia, Volume 1, 2 and 3 by Dilys Roe, Maryanne Grieg-Gran and Wouter Schalken. Poverty, Inequality and Environment Series No 1, June 2001.

Joint Ventures Between Communities and Tourism Investors: Experience in Southern Africa, by Caroline Ashley and Brian Jones, *International Journal of Tourism Research*, special issue on fair trade in tourism, Vol. 3, No. 2, March 2001.

Goodwin H & Francis J (2003) Ethical and Responsible Tourism: consumer trends in the UK *Journal of Vacation Marketing* 9 (3) 2003 pp 271-284

World Tourism Organization (2002) *Tourism and Poverty Alleviation* World Tourism Organization. Madrid

Goodwin H Pro-Poor Tourism, Opportunities for Sustainable Local Development in *Development and Cooperation* 5/2000 DSE Frankfurt ISSN 0721-2178:12-14

Goodwin H and Spenceley A (2002) National Responsible Tourism Guidelines For South Africa and Explanatory letter to accompany them. DEAT March, 2002 subsequently published as Guidelines for Responsible Tourism by DEAT, May 2002

Goodwin H (2002) Local Community Involvement in Tourism around National Parks: Opportunities and Constraints in Special Issue of *Current Issues in Tourism* 5(3&4) 2002 reprinted in *Local Community Involvement in Tourism around National Parks: Opportunities and Constraints* in Luck M & Kirstges T (2003) *Global Ecotourism Policies and Case Studies* Channel View Publications

Goodwin H (1998) *Sustainable Tourism and Poverty Elimination*, A Discussion Paper for the Department for the Environment, Transport and the Regions and the Department for International Development (unpublished)

Goodwin, H & Roe, D *Tourism Livelihoods and Protected Areas: Opportunities for Fair-trade Tourism in and around national parks* *International Journal of Tourism Research* (3) 2:377-391

ICRT/NRET (2002) *Harnessing Tourism for Poverty Elimination: A Blueprint from the Gambia*
www.nri.org/NRET/GambiaFinalSummaryReport2.pdf

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Sheet No. 14: Introductory Bibliography – Tourism, Development and Poverty Reduction

This Information Sheet is intended to provide a preliminary list of key readings for those wishing to know more about tourism, sustainable development and poverty reduction and the links between them.

Tourism and Poverty

Ashely, C., Roe, D. and Goodwin, H. (2001) Pro-poor Tourism Strategies: Expanding Opportunities for the Poor. PPT Briefing No. 1. ODI, IIED, CRT

Ashely, C., Roe, D. and Goodwin, H. (2001) Pro-Poor Tourism Strategies: Making Tourism Work for the Poor. A Review of Experience, PPT Report No. 1 ODI, IIED, and CRT.

Ashley, C., Goodwin, H and Roe, D. (2002) The Tourism Industry and Poverty Reduction: A Business Primer.- poor tourism briefing No.2. ODI, IIED, ICRT

Ashley, C. (2003) Methodology for Pro-Poor Tourism Case Studies. PPT Working Paper No. 10. ODI, London.

Bah, A. and Goodwin, H. (2003) Improving Access for the Informal Sector to Tourism in The Gambia. PPT Working Paper No. 15. ODI, London.

Braman, S. and Fundacion Accion Amazonia. (2001) Practical Strategies for Pro-Poor Tourism: Tropic Ecological Adventures. PPT Working Paper No. 6. ODI, London.

Cattarinich, X. (2001) Pro-Poor Tourism Initiatives in Developing Countries: Analysis of Secondary Case Studies. PPT Working Paper No. 8. ODI, London.

Holland, J., Dixey, L. and Burian, M. (2003) Tourism in Poor Rural Areas: Diversifying the Product and Expanding the Benefits in Rural Uganda and the Czech Republic. PPT Working Paper No. 12. ODI, London.

Kareithi, S. (2003) Coping with Declining Tourism, Examples from Communities in Kenya. PPT Working Paper No. 13. ODI, London.

Mahony, K. and Van Zyl, J. (2001) Practical Strategies for Pro-Poor Tourism: Case studies of Makuleke and Manyeleti tourism initiatives: South Africa. PPT Working Paper No. 2. ODI. London.

Meyer, D. (2003) Outbound UK Tour Operator Industry and Implications for PPT in Developing Countries. PPT Working Paper No. 17. ODI, London.

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Nicanor, N. (2001) Practical Strategies for Pro-Poor Tourism: NACOBTA the Namibian Case Study. PPT Working Paper No. 4. ODI, London.

Poultney, C. and Spenceley, A. (2001) Practical Strategies for Pro-Poor Tourism: Wilderness Safaris South Africa: Rocktail Bay and Ndumu Lodge. *PPT Working Paper* No. 1. ODI, London.

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