

TOURISM EFFECTS ON EQUITY AND SECURITY: PERSPECTIVES FROM LOCAL POOR PEOPLE

BENXIANG ZENG
University of Queensland
Australia

This paper analyses the effects of tourism on equity and the security of local poor households in China. Tourism is found to be an important income source for local households, although the poor get much less benefit than other households. While most stakeholders realized the inequity and disadvantages for the poor, there are significant differences in perceptions of tourism effects between local households and other stakeholders, as well as between the poor and other income groups. Stakeholders other than local households generally over-estimate positive tourism effects on local economic growth and underestimate the extent of cultural change. Households generally believe tourism increases their cash income, creates employment opportunities, and improves living standards. However, the poor are more circumspect than higher income groups about these effects. The poor consider that tourism development does not improve access to education opportunities, and are concerned about the widening gap between the poor and 'rich'. However, wealthy people were concerned about the negative social impacts of tourism, while the poor were more positive about tourism's effect on social security. The major barriers for the involvement of the poor in tourism are socio-economic, especially the lack education. The high cost of education and its effect on household expenditure, means that the poor are trapped and can rarely take advantage of the benefits of tourism. The study suggests a modification of the Sustainable Tourism-Eliminating Poverty model to include policies for reinvestment of tourism's economic benefits into human capital (education) to reduce the imbalance between household income and expenditure.

Effects, equity, poor, security, tourism

INTRODUCTION

Tourism has grown rapidly to be an activity of worldwide importance and to become a major social and economic force in the world (McIntosh, *et al.*, 1995) at national, regional and community scales. Positive economic effects include increased foreign currency earnings (Buckley and Geyikdagi, 1993; van der Waal and Dekker, 2000) and government revenues (Henry and Deane, 1997), increased employment and skills of local community members (Szivas and Riley, 1999; Mbaiwa, 2003; Szivas, *et al.*, 2003), and regional development (Marcouiller, *et al.*, 2004). Tourism also can bring negative economic impacts such as inflation (Coppin, 1993; Walpole and Goodwin, 2001), market dependency (Putsche, 2000), financial leakage (Brown, 1998; Hampton, 1998), and imbalances in the distribution of tourist spending which can lead to host-community dissatisfaction (Oppermann and Chon, 1997).

Social effects of tourism (both positive and negative) have generally been a challenge for local communities. Social impacts occur on population structure, types of occupations, social values, traditional lifestyles and consumption patterns (Wearing, 2001). A particular social effect of tourism of concern, especially in developing countries, is the loss of host community culture at a rate unacceptable to the community (and tourists) (Carter and Beeton, 2004). Rapid and unfettered commercial tourism development plays a major role in the transformation of local spatial, social

and cultural characteristics (Palmer, 1994; Cooper and Morpeth, 1998). Changes in the meanings of landscape features for the local area, brought about by the appropriation and commodification of tourist attractions, will have serious implications for the cultural survival of local communities (Brown, 1994). The degree of impact from tourism development is related to the situation of local social and cultural systems, such as the degree of market development within the indigenous community and natural resource scarcity (King and Stewart, 1996). Vorlaufer (1999) argues that cultural change brought on by tourism only affects the superficial structure, whereas it is hard to detect a negative impact of tourism on the cultural base (e.g. religion). However, some deleterious impacts from tourism do exist involving human displacement, subsistence disruptions, social conflict, loss of autonomy, dependency, crime, and other disturbances of the host culture such as language change (Eastman, 1995). Some research has shown that the negative impacts can be eliminated or moderated by tourism planning and governmental intervention (Shackley, 1995). While there are some unavoidable negative effects associated with tourism, indigenous communities can ameliorate problems by formulating a clear plan and educating the members of their communities as to its contents and implications (Snow and Wheeler, 2000).

Many environmental indicators have been proposed to address the environmental impacts of tourism, but, in many cases, indicator research fails to evaluate the integrated ecological impact of tourism (Hughes, 2002). Some studies have identified the negative environmental impacts of tourism development on destinations and examined how the tourism sector is addressing this challenge by balancing the benefits of tourist activity without compromising the environment (Fischer and Sulzer, 1994; Shackley, 1999; Kousis, 2000; Reeves, 2002). In some cases, it is identified that tourism can contribute to ecosystem conservation (Loumou, *et al.*, 2000).

While there are multiple effects from tourism on tourism destinations at different levels, it is important to understand local stakeholders' perceptions of these effects, because these influences response. Much research concerning the attitudes of local residents towards tourism development has been undertaken since 1990. Residents' attitudes towards tourism development differ with their economic situations and with levels of tourism development in their communities (Allen, *et al.*, 1993). However, local residents have generally been associated with positive attitudes toward tourism, a perception that an overall benefit will accrue and hence support most types of development (Andereck and Vogt, 2000; Avckurt and Soybal, 2001). Gursoy and Rutherford (2004) proposed that host community support for tourism development is affected directly or indirectly by nine determinants: the level of community concern, ecocentric values, utilization of the tourism resource base, community attachment, the state of the local economy, economic benefits, social benefits, social costs, and cultural benefits. However, the perspectives of local poor people, a special stakeholder group, on different aspects of the multiple effects of tourism, have rarely been considered.

Recently, studies based on Sustainable Tourism-Eliminating Poverty (ST-EP) principles have considered tourism's contribution to poverty alleviation in developing countries (Ashley, *et al.*, 2000; Ashley and Roe, 2002; Goodwin, 2002; WTO, 2002; Mbaiwa, 2003; Sofield, *et al.*, 2004; WTO, 2004). ST-EP is an initiative to creatively develop tourism as a force for poverty elimination. It provides a framework that seeks to encourage sustainable tourism (social, economic and ecological), which specifically alleviates poverty, bringing development and jobs to people living on less than a dollar a day, targeting the world's poorest countries, particularly Africa and developing countries in general (Sofield, *et al.*, 2004; WTO, 2004). Understanding poor people's perspectives on tourism effects on local communities is important, particularly in developing countries, when developing strategies for a ST-EP strategy. This paper reports the results of a case study undertaken in China that surveyed perspectives on tourism development from different stakeholders. The study explored the effects of tourism, particularly with regard to equity and security, on local households. Local poor people were the focus of the study.

CASE STUDY AREA

The study was conducted in communities associated with a group of protected areas in the Taibai Region in Shaanxi, a western province of China, where tourism development has been increasing and poverty is a challenge for government and tourism (China-MAB, 2000). The field survey sites included Taibai Mountain National Nature Reserve, Taibai Mountain National Forest Park, Heihe Forest Park, Laoxiancheng Nature Reserve, and Changqing National Nature Reserve, along with their adjacent communities (Figure 1).

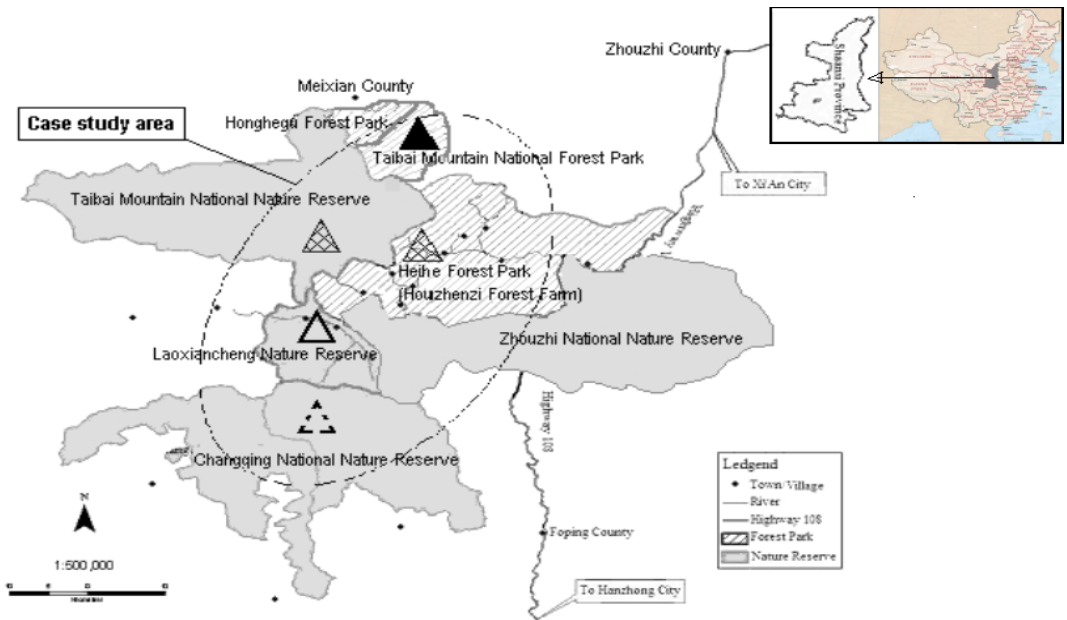


Figure 1
Location of the case study area

Shaanxi is one of the less developed provinces in China. The annual net income per rural resident is a mere US\$192.88, i.e. US\$0.53 per day. This is much lower than the average national level of US\$299.22 (Table 1). It means that people here are living in poverty according to an international poverty indicator that sets the poverty level at under US\$1 per day (World Bank, 2001). The local rural communities (Meixian, Zhouzhi and Yangxian) have even lower per capita net annual incomes and per capita Gross Domestic Production (GDP) than the provincial average (Table 1).

Shaanxi is an important tourism province in China. In 2002, international visitors numbered 0.85 million, 12.0% up on 2001. The annual receipts from international tourism were US\$351.0 million, a 14.0% increase on 2001. In addition, domestic tourism continues to increase. The number of domestic tourists in 2002 was 37.3 million, an 11.0% increase on 2001. Annual receipts from domestic tourism were US\$1,909.4 million, an 11.3% annual growth (Statistics Bureau, 2003).

Table 1
Economic development indicators (2003)

Geographic/political unit	Per capita annual net income of rural residents	Per capita GDP
China	US\$316.87	US\$1091.29
Shaanxi Province	US\$202.54	US\$783.18
Meixian County	US\$190.58	US\$546.12
Zhouzhi County	US\$203.27 (2001 data)	US\$422.40
Yangxian County	US\$163.03	US\$337.83

Data sources: China and Shaanxi Province Statistical Yearbooks 2003.

Taibai Region is undergoing rapid development to cater to the increasing number of tourists. The region contains some of the most important habitats for the Giant Panda, Gold Monkey and Golden Takin; three endangered species listed on the IUCN Red Book (IUCN, 2004). However, although potentially of international interest, the number of international tourist arrivals is low and the rapidly growing local market is based largely on outdoor recreation and scenery, rather than wildlife tourism. As indicated by tourist numbers, different levels of tourism development are occurring in the forest parks and nature reserves, as well as in their adjacent communities (Table 2).

Table 2
Tourism development in forest parks and nature reserves (2002)

	Tourist numbers	Revenue (US\$ 000)	Adjacent communities
Taibai Mountain National Forest Park	180	1,587.97	Tangyu Town in Meixian County
Taibai Mountain National Nature Reserve	13	12.69	
Taibai Mountain Tourism Development Zone	1,060,000	14,502.00	
Laoxiangcheng Nature Reserve	2	2.42	Houzhenzi Town in Zhouzhi County
Heihe Forest Park	3	48.32	
Changqing National Nature Reserve	615	--	Huayang Town in Yangxian County

Data source: Related park/reserve management authorities.

Taibai Mountain National Forest Park has been open to tourists since 1991 when it was established. Tourist numbers have continued to increase, attracted by the natural landscapes and the natural hot spring resources outside of the park. In 2002, the park was visited by 180,000 tourists and the surrounding Taibai Mountain Tourism Development Zone by 1.06 million. This activity generated US\$14.50 million, with 95.5% of the revenue taken in Meixian County, of which US\$0.54 million was paid to the government in taxes (Tourism Bureau, 2003).

In contrast, Taibai Mountain Nature Reserve was opened to tourists in 1995 and received only 13,000 tourists in 2002 (Management Bureau, 2003). The biodiversity and the Tao religion are the attractions. Heihe Forest Park and Laoxiangcheng Nature Reserve attracted far fewer visitors and tourism development is just commencing in these areas. In Changqing National Nature Reserve, there were so few visitors to suggest that tourism development (and interest) has not commenced.

These data suggest that the protected areas are not, as yet, a main attractor (fewer than 20% of tourists visit the forest parks and reserves), but rather, that tourists are attracted by the countryside, the mountain scenery and the respite from urban living. Furthermore, tourism in the region is at different stages of development.

SURVEY METHODS

A field survey was conducted from July to August 2003. Local households (n=108) were interviewed in the three communities adjacent to different areas where tourism development is occurring at different levels (see Table 2). The sample was generated by selecting the 5th or 10th household, depending on total villager household numbers, from the name-list of villager households. Trained research staff interviewed heads of selected households in their homes (in some cases they came to a village office). If the targeted interviewee was not available, an alternative household (the next one on the name list or the neighbouring household) was interviewed. A questionnaire using structured questions with some open-ended questions was used in the interview to keep the interview information suitable for statistical analysis. Since households did always answer all questions, some analyses involve a smaller sample size (i.e. n<108).

In addition, other stakeholders, including employees of tourism businesses or park/reserves (n=53), officials and experts (n=16) from related agencies and local tourism business managers (n=12) were selected opportunistically for interviews based on related questions, modified to be directly appropriate to the interviewee's role.

The field survey obtained information on local perspectives on tourism's effects, as well as details of incomes and spending structures of local residents and local businesses. The resultant combination of cash flow data and perspectives permits triangulation of results by matching real benefits (in quantitative terms) with perceptions (in qualitative terms).

RESULTS

Based on the categories of rural resident net income adopted by Chinese governments (Statistics Bureau, 2003), local households were categorized into three groups by per capita annual income: the poor, ≤CNY869 (US\$105.02); low income, CNY869-2,142 (US\$105.02-258.86); and middle-high income, >CNY2,142 (US\$258.86). While there is a difference between the internationally recognised poverty line (US\$1 per capita per day) and the Chinese standard, given the special national situation in China, "the poor" in this study refers to households with a per capita annual net income lower than US\$105.02 (i.e. US\$0.29 per capita per day). In the household sample (n=108), there were 40 poor households, 39 low income households and 29 middle-high income households.

Tourism's economic benefits to the poor

Households in the region received an average income of US\$189.2 from tourism, or 20.1% of their total income (an average of US\$943.7) (Figure 2). However, poor households received only US\$14.6 from tourism, or only 6.5% of their total income. This is much lower than that for the low income household group (US\$129.2, 17.3%) and much lower than the middle-high income household group (US\$510.9, 23.2%). A significant positive correlation exists between per capita income and proportion of income gained from tourism (n=108, p=0.245, sig.=0.010 (<0.05)). It suggests that tourism is a very important income source for local households, however local poor households obtain much less benefit from tourism than other households do.

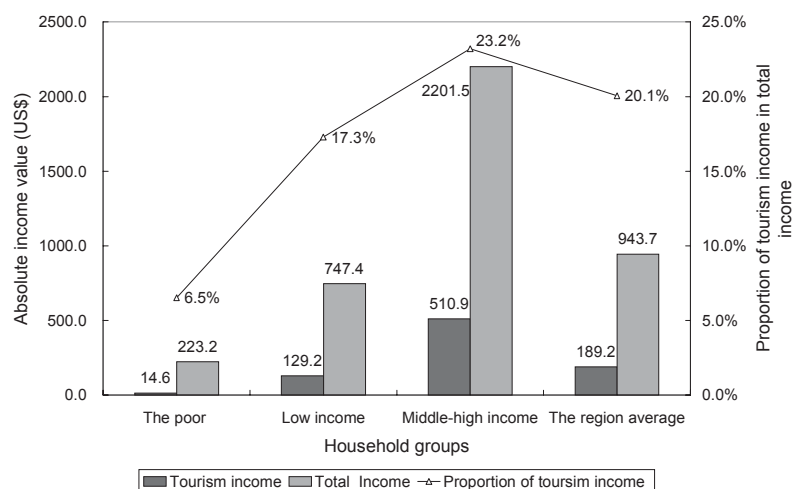


Figure 2
Proportion of tourism income and total cash income by household group

Equity issues in households benefiting from tourism

When asked whether tourism benefits local poor people financially, 82.4% of local stakeholders (including officials of local governments and related agencies, business managers, employees in local businesses and parks/reserves, and local households) believed that local poor people did obtain some financial benefit, with the remainder believing that they received “no” benefit (Table 3). There are major differences in perceptions of different stakeholder groups. All agency staff indicated that poor people gained benefit, although most (81.3%) considered the benefit to be “small” or “too small”. Most business managers and their employees and park/reserve staff (91.7%-100.0%) thought local poor people obtained benefit from tourism. In contrast, a large proportion of local households (31.3%) considered local poor people gained “no” benefit at all. There was also a difference in perception between local households in ‘tourist areas’ and those in ‘non-tourist areas’. Local households (55.2%) in tourism development areas believed local poor people obtained “no” financial benefit from tourism, while households in areas without tourism had a more optimistic expectation about benefits to the poor (only 13.2% answered “no”).

Local households with close links to tourism development appear not to be as optimistic about benefits as other stakeholders are, including those expecting tourism development in their area in the future. In addition, agency staff, business managers and tourism employees appear to over-estimate the economic benefit of tourism to local people, including the poor. Local poor people have probably encountered the many barriers that exist to becoming involved in and obtaining benefits from tourism development. Yet these may be unseen by other stakeholders. Equally, households in areas without tourism have high expectations that tourism development will greatly benefit them.

Table 3
Local stakeholder perspectives on tourism's financial benefit to local poor people

Stakeholder groups	Numbers of interviewees	Response to "Do you think tourism can benefit local poor people?"		
		No	Yes	Yes, but small or too small
Officials and experts from related agencies	16	0.0%	100.0%	81.3%
Business managers	12	8.3%	91.7%	50.0%
Employees	53	7.5%	94.3%	50.9%
Households in the region	67	31.3%	68.7%	23.9%
in tourism areas	29	55.2%	44.8%	31.0%
in non-tourism areas	38	13.2%	86.8%	18.5%
All stakeholders in the region	148	17.6%	82.4%	41.9%

For household income groups, 38.9% of poor households thought they gained no benefit from tourism, while a lower proportion of other income groups thought the poor gained no benefit (low income, 25.9% and middle-high income, 27.3%) (Table 4). Although a higher proportions of low income (74.1%) and middle-high income (72.7%) households believed local poor people could get some benefit, 29.7% and 27.2% respectively believed it would be "small or too small". However, there is no statistical difference between household income group and opinions on whether the poor gain no benefit from tourism ("no" and "yes, but small or too small" being combined). Nevertheless, the percentage results suggest that poor people do realize that they are disadvantaged in obtaining benefits from tourism, and that most low income and middle-high income households acknowledge the situation confronting the poor and an inequity in the extent to which tourism benefits different socio-economic households.

Table 4
Households' perspectives on tourism benefit to local poor people (N = 67)

Household groups	Response to "Do you think the local poor can get benefit from tourism?"		
	No	Yes	Yes but small or too small
The poor	38.9%	61.1%	11.1%
Low income	25.9%	74.1%	29.7%
Middle-high income	27.3%	72.7%	27.2%
Regional average	29.9%	70.1%	23.8%

To explore the perceptions further, local households were asked to score the effects of tourism on local households on a 7-point scale from very strong negative effect (-3) to a very strong positive effect (+3). The poor households gave the lowest average score (0.95) to economic effect, much lower than the regional average (1.41), as well as other household groups (Table 5). This suggests that although all households in the region believed tourism development had a positive effect on economic development, poor people were not as optimistic as others were.

Table 5
Household scoring economic effect of tourism on local households (N=108)

Household groups	Scores of economic effect	Scores of cultural effect
The poor	0.95	1.05
Low income	1.53	1.23
Middle-high income	1.67	1.29
Regional average	1.41	1.20

In terms of cultural effect, local households trended to consider that there was a strong tourism effect on culture (score=1.2), although there were no statistically significant differences among different income groups.

Employment opportunities

The primary employment opportunities created through tourism are often in hospitality, craft making, shop ownership, tour operation, government agency staff, and park rangers (Wearing, 2001). There is often a lack of skills and resources in host communities, so many tourism ventures are often owned and operated by outsiders, with the result that employment opportunities for local people are less than expected (Weiler and Hall, 1992). Approximately 7,000 people were employed in tourism-related businesses in Meixian County in 2002, as estimated by local governments. In Tangyu Town, around 1,500 people provided services in hotels, food provision and as guides (Tourism Bureau, 2003).

The field survey showed that, on average, each hotel creates 37.3 jobs, 77.6% being taken by employees from the local county including the local town, with the balance from other counties in Shaanxi Province. Half of the poor households in the survey considered that tourism had a positive effect on employment, while 40.9% thought the effect was neutral or negative (9.1%). Much higher proportions of low income (81.3%) and middle-high income (91.7%) households believed tourism had a positive effect on employment (Table 6). This suggests that while local households tend to acknowledge a positive effect on employment, the poor households generally had a more conservative or uncertain perspective with a large proportion opting for a neutral response.

Table 6
Perspective on tourism effects on employment (N=49)

Household groups	Response to "How do you think tourism affects employment?"		
	Negative	Neutral	Positive
The poor	9.1%	40.9%	50.0%
Low income	6.3%	12.5%	81.3%
Middle-high income	9.1%	33.3%	91.7%
Regional average	6.1%	22.4%	71.4%

Household expenditure and income

Of total spending by local households, special expenses (sporadic spending for house-building, births, marriages and funerals) was the largest category, averaging 28.5% of total spending. This is not surprising because while this expenditure is not incurred regularly, when it does, it is usually very costly (up to CNY200,000, i.e. US\$24,170 for one of these events). Of the other expenditure items, education is the largest household cost item: 18.4% of total spending, followed by food consumption, production cost and house maintenance (Figure 3).

Total annual cash household income is much lower than total annual spending for most households. The relative gap between cash income and spending is much larger for poor households than others, although the absolute gap for the poor is smaller than that for the low income households (Figure 4). This means that most households rely on loans or previous savings to cover costs and to sustain their educational commitments. It also means that they are unlikely to be able to service their debit balance until they are able to double their cash income in later years (relative balance gap was -163.6%).

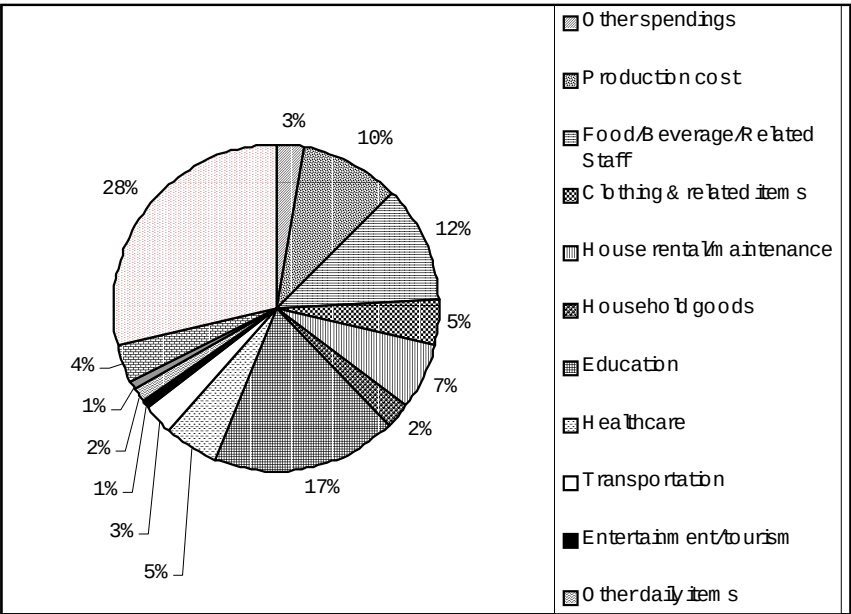


Figure 3
Household spending structure

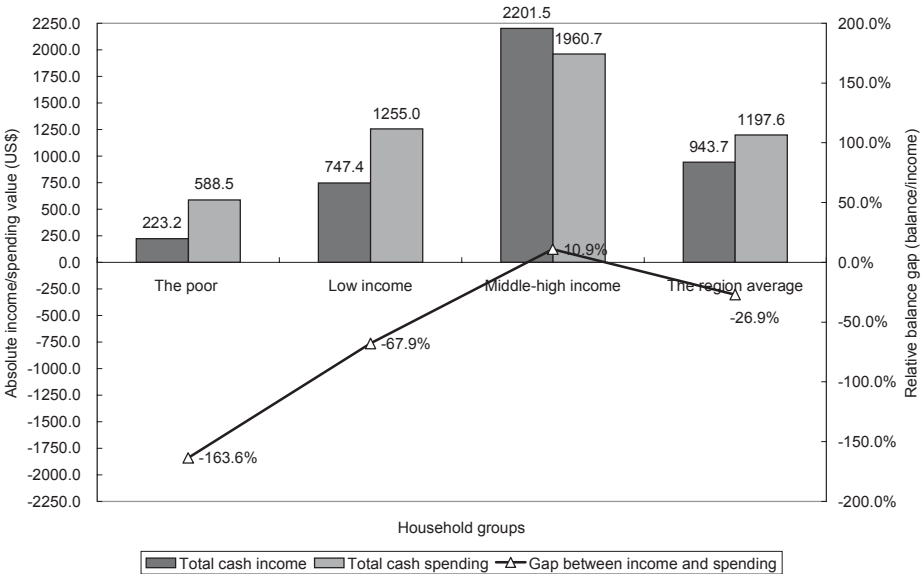


Figure 4
Balance between cash income and spending

The poor reported difficulties in supporting their children to go to school, although they were doing so. This suggests that although tourism development generally benefited local households, including the poor, it did not ease access to education for children of poor people. Education costs are high for all households, but loans are taken out to cover costs, showing a commitment to improving family (and community) wellbeing and social capital: important dimensions of sustainable development. However, if the cost of education could be removed, the situation would be much improved with significant reductions in the imbalance between income and expenditure (Figure 5). This suggests that if poverty alleviation were a priority, government investment in education would significantly improve social capital and relieve poor and low income households from the poverty trap through achieving a reasonable financial balance.

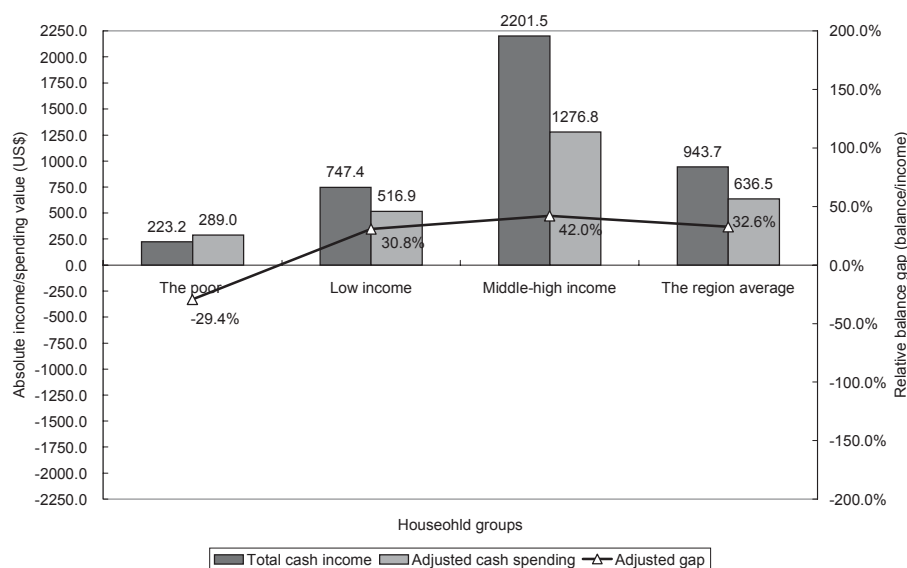


Figure 5

Balance between cash income and adjusted cash spending (education expenses removed)

Livelihood security

Food supply is selected as an indicator of household livelihood security. No significant difference in food supply amount was found among the different income groups. However, when considering “food diversity”, only a small proportion (27.0%) of poor households, and much lower for middle-high income households, believed that they had sufficient diversity (Table 7). This suggests that although local households considered they have access to sufficient food, higher income households could buy a greater variety of food, rather than just grains and vegetables, while the local poor could only just meet basic food needs.

Table 7
Households' perspective on their food security

Questions relating to food security		Response for different household groups			
		The poor	Low income	Middle-high income	The regional average
Do you have sufficient food? (N=100)	No	5.30%	0.00%	0.00%	2.00%
	Not sure	7.90%	2.90%	0.00%	4.00%
	Yes	86.80%	97.10%	100.00%	94.00%
Do your food of appropriate nutritional value? (N=100)	No	18.40%	31.40%	14.80%	22.00%
	Not sure	13.20%	5.70%	3.70%	8.00%
	Yes	68.40%	62.90%	81.50%	70.00%
Do you have appropriate diversity in your food? (N=99)	No	54.10%	45.70%	29.60%	44.40%
	Not sure	18.90%	17.10%	3.70%	14.10%
	Yes	27.00%	37.10%	66.70%	41.40%

To identify perceived changes, respondents were asked to rate their living standard at 5-year intervals, based on 10 units representing their standard of living in 1993. Poor households tended to indicate that there had been gradual improvement, but at a slower rate (52% improvement by 2003 compared with 1993) than the regional average (77% improvement by 2003), and much slower than middle-high income households (104% improvement by 2003) (Figure 6). While living standards have generally improved in China during this time, since tourism development started in the case study area in the early 1990s, it seems reasonable to assume that it contributed to the rise in regional economic growth and household living standards.

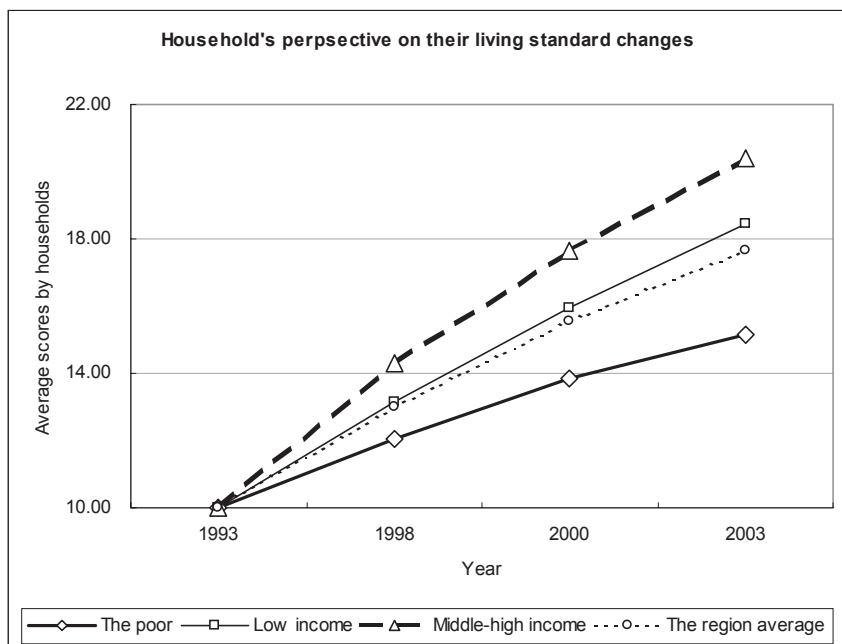


Figure 6
Household's perspective on their living standard improvement

Although most households (77.6%) believed that tourism could assist in poverty elimination and reduce the number of poor people in the region, more than one third (36.7%) suggested that the gap between the poor and the wealthy would increase (Table 8).

Table 8
Perspective on tourism's effects on poverty (N=49)

Response	Response to "How does tourism affect poverty issues?"	Increased gap between poor and wealthy
	Reducing number of poor people	
Negative	6.1%	36.7%
Neutral	16.3%	22.4%
Positive	77.6%	40.8%

Therefore, while local households generally believed tourism development could benefit local people, including local poor people, by reducing the absolute number of the local poor, they remained concerned about the widening gap between the poor and wealthy.

Social security

Most households in the region (57.1% - 58.3%) believed that tourism development had a positive effect on social phenomena, with the indicators used being crime, traditional customs and local culture (Table 9). In contrast with the perception of economic benefits, middle to high income earners were more pessimistic about the social impacts of tourism than lower income groups. The poor, in particular, were very positive about the influence of tourism on traditional customs and local culture, whereas middle to high income households were neutral or negative to the suggested social changes. That is, the poor considered that tourism would promote and contribute to social security, but the wealthier tended to be aware of potential negatives.

Table 9
Percentage of household's perspective on social security (NEED N values)

Social phenomena		Proportion of different household groups			
		The poor	Low income	Middle-high income	The regional average
Criminal cases	Negative	0.0%	0.0%	25.0%	6.3%
	Neutral	38.1%	31.3%	41.7%	35.4%
	Positive	61.9%	68.8%	33.3%	58.3%
Traditional customs	Negative	0.0%	6.3%	16.7%	6.3%
	Neutral	19.0%	43.8%	58.3%	35.4%
	Positive	81.0%	50.0%	25.0%	58.3%
Local culture	Negative	0.0%	0.0%	8.3%	2.0%
	Neutral	22.7%	40.0%	75.0%	40.8%
	Positive	77.3%	60.0%	16.7%	57.1%

We hypothesise that there may be educational and experience influences at work here, or at least differences in tolerance of the negative effects of tourism on social factors as a trade-off for economic benefits. For the relatively wealthy, most had travelled beyond the study area and experienced tourism effects. In addition, there may be the perception that there is more to lose from increased crime rates and a perception of less to gain from tourism development.

DISCUSSIONS AND CONCLUSIONS

In China, many emerging tourism destinations are located in underdeveloped areas, and local residents, including the poor, are positive about participating in tourism development activities for the 'promised' benefits. The study has shown that tourism is an important income source for local households, although the local poor receive much less benefit from tourism than other households.

Most stakeholders believe that tourism can have a positive effect on local economic growth as well as on protecting cultural integrity, and that the local poor would positively benefit. However, local households, especially the poor, were not as optimistic as others were, particularly concerning economic benefits. Since the poor live through the economic changes, we hypothesise that they are more sensitive to the economic benefits tourism brings and that other income groups over-estimate the effects of tourism and economic growth on the poor. Households expecting tourism development are more positive about tourism than those already experiencing tourism development, which also implies possible over-expectation of those yet to experience tourism growth. While over-estimation and over-expectation may be traits with respect to opinions about tourism, and possibly inconsequential economically in the long term at the regional level, false perceptions may have significant consequences for public policy and the tourism development agenda, and may even extend beyond national investment in tourism to include well-meaning international aid programs expected to assist the poor.

Households generally believe tourism will create more employment opportunities, although poor households had a more conservative judgement than other households and complained that they usually could not access tourism-created jobs. If the perceptions (and in the study area, the experiences) of the poor are correct, then a policy of tourism development, that is blind to the lack of penetration of benefits to the poor, may aid regional economies but at the cost of widening the socio-economic gap.

The poor realize that they are disadvantaged in benefiting from tourism, while other households acknowledge the inequity confronting the poor. Barriers exist to the involvement of the poor in tourism development, largely because they lack personal capacity (e.g. low education and lack of financial capital) and are disadvantage in competitive situations. There are few effective government interventions to help such people and remove the inequity (Ashley, Boyd and Goodwin, 2000; Ashley and Roe, 2002).

The balance of income versus subsistence expenditures for the poor suggests that the relatively rich will get richer and the poor poorer with tourism, both because of opportunity and inflation, especially associated with the desire of the Chinese community to invest in human capital in the form of family education. Such a situation is far from the ideals of sustainable tourism. Education is the second largest but the most important household expenditure category for the aspirations of the community in the study area (and possibly all of China). However, there is no evidence in this study that tourism development increased opportunities for the local poor to access education. Since the economic benefits of tourism development do not appear to filter down to the poor, and in fact, there appears to be a socio-economic block to this, it suggests to us that a strategy for poverty alleviation through tourism using laissez-faire market processes is inappropriate. Rather, investment of tourism revenues in education would penetrate to the poor and achieve community equity and aspirations, and ultimately alleviate chronic poverty by reducing the major economic cost to households and achieve a reasonable financial balance for the majority of the community.

For lifestyle security, local households are in a dilemma with respect to tourism development. On the one hand, they are satisfied with the lifestyle improvements, including increased availability of food and its diversity. On the other, there remains concern for the increasing gap between the poor and the wealthy. This gap is expressed in differences in perceptions of tourism and its benefits. The poor are more tolerant of tourism's negative effects on social factors than other households are. Yet it is ironic that this study suggests that they will be the group that will gain least from tourism development and will endure the most of socio-cultural change.

Since many natural tourism destinations are located in underdeveloped areas, the local poor have few employment opportunities and hence are willing to participate in tourism development activities. However, they have low capacity for involvement, largely due to the absence of investment capital and education. While Sustainable Tourism-Eliminate Poverty (ST-EP) may be one model for alleviating poverty, this study suggests that tourism alone will not address the ideals of such programs unless strategic investment of tourism's economic benefits is applied to fundamental social inequities. Thus, governments have a crucial role in overcoming existing barriers blocking the poor's involvement by making pro-poor tourism development policies, establishing mechanisms to encourage local participation, facilitating capacity building including technical training, preferential education, infrastructure development and removing cost structures that perpetuate poverty. Nothing proposed here contravenes existing Chinese government policies; rather it simply means policy that gives greater attention to investment in human capital as along with physical capital.

REFERENCES

- Allen, L.R., Hafer, H.R., Long, P.T. and Perdue, R.R. (1993). Rural residents' attitudes toward recreation and tourism development. *Journal of Travel Research* 31 (4): 27-33.
- Andereck, K.L. and Vogt, C.A. (2000). The relationship between residents' attitudes toward tourism and tourism development options. *Journal of Travel Research* 39 (1): 27-36.
- Ashley, C., Boyd, C. and Goodwin, H. (2000). Pro-poor tourism: putting poverty at the heart of the tourism agenda. *ODI Natural Resource Perspectives*. 2000; (51): 6, London UK: Overseas Development Institute (ODI).
- Ashley, C. and Roe, D. (2002). Making tourism work for the poor: strategies and challenges in southern Africa. *Development Southern Africa* 19 (1): 61-82.
- Avckurt, C. and Soybal, H. (2001). Residents' attitudes towards tourism in Ayvalik, Turkey. *Tourism Analysis* 6 (3/4): 259-265.
- Brown, D.O. (1998). In search of an appropriate form of tourism for Africa: lessons from the past and suggestions for the future. *Tourism Management* 19 (3): 237-245.
- Brown, F. (1994). Small Towns and Tourism. *Tourism Management* 15 (3): 234-235.
- Buckley, P.J. and Geyikdagi, N.V. (1993). Tourism and Foreign-Currency Receipts. *Annals of Tourism Research* 20 (2): 361-367.
- Carter, R.W. and Beeton, R.J.S. (2004). A model of cultural change and tourism. *Asia Pacific Journal of Tourism Research* 9 (4): 423-442.
- China-MAB (2000). *Study on Sustainable Management Policy for China's Nature Reserves*. Beijing, Scientific Literature Press.
- Cooper, C. and Morpeth, N. (1998). The impact of tourism on residential experience in Central-Eastern Europe: The development of a new legitimization crisis in the Czech Republic. *Urban Studies* 35 (12): 2253-2275.
- Coppin, A. (1993). Recent-Evidence on the Determinants of Inflation in a Tourism-Oriented Economy - Barbados. *Social and Economic Studies* 42 (2-3): 65-80.

- Eastman, C.M. (1995). Tourism in Kenya and the Marginalization of Swahili. *Annals of Tourism Research* 22 (1): 172-185.
- Fischer, W. and Sulzer, W. (1994). Economical and Ecological Effects of Tourism in Langtang National-Park (Nepal). *Mitteilungen Der Osterreichischen Geographischen Gesellschaft* 136: 225-242.
- Goodwin, H. (2002). *Pro-poor tourism: a new approach for poverty alleviation*. Tourism: a catalyst for sustainable development in Africa, Abuja, Nigeria, 26-27 April 2002., Madrid Spain: World Tourism Organization (WTO).
- Gursoy, D. and Rutherford, D.G. (2004). Host attitudes toward tourism - an improved structural model. *Annals of Tourism Research* 31 (3): 495-516.
- Hampton, M.P. (1998). Backpacker tourism and economic development. *Annals of Tourism Research* 25 (3): 639-660.
- Henry, E.W. and Deane, B. (1997). The contribution of tourism to the economy of Ireland in 1990 and 1995. *Tourism Management* 18 (8): 535-553.
- Hughes, G. (2002). Environmental indicators. *Annals of Tourism Research* 29 (2): 457-477.
- IUCN (2004). 2004 IUCN Red List of Threatened Species. Online documents at the website of IUCN: www.redlist.org (Dec. 15, 2004).
- King, D.A. and Stewart, W.P. (1996). Ecotourism and commodification: Protecting people and places. *Biodiversity and Conservation* 5 (3): 293-305.
- Kousis, M. (2000). Tourism and the environment. A social movements perspective. *Annals of Tourism Research* 27 (2): 468-489.
- Loumou, A., Giourga, C., Dimitrakopoulos, P. and Koukoulas, S. (2000). Tourism contribution to agro-ecosystems conservation: The case of Lesbos Island, Greece. *Environmental Management* 26 (4): 363-370.
- Management Bureau, T. (2003). Annual management report on Taibai Mountain National Nature Reserve. Meixian, Taibai National Nature Reserve Management Bureau.
- Marcouiller, D.W., Kim, K.K. and Deller, S.C. (2004). Natural amenities tourism and income distribution. *Annals of Tourism Research* 31 (4): 1031-1050.
- Mbaiwa, J.E. (2003). The socio-economic and environmental impacts of tourism development on the Okavango Delta, north-western Botswana. *Journal of Arid Environments* 54 (2): 447-467.
- McIntosh, R.W., Goeldner, C.R. and Richie, J.R.B. (1995). *Tourism : principles, practices, philosophies*. New York, John Wiley & Sons.
- Oppermann, M. and Chon, K.S. (1997). *Tourism in developing countries*. London, International Thomson Business Press.
- Palmer, C.A. (1994). Tourism and Colonialism - the Experience of the Bahamas. *Annals of Tourism Research* 21 (4): 792-811.
- Putsche, L. (2000). A reassessment of resource depletion, market dependency, and culture change on a Shipibo reserve in the Peruvian Amazon. *Human Ecology* 28 (1): 131-140.
- Reeves, N. (2002). Managing the impact of tourism on the environment. *Journal of the Chartered Institution of Water and Environmental Management* 16 (1): 7-11.
- Shackley, M. (1995). Just started and now finished: Tourism development in Arunachal Pradesh. *Tourism Management* 16 (8): 623-625.
- Shackley, M. (1999). Tourism development and environmental protection in southern Sinai. *Tourism Management* 20 (4): 543-548.
- Snow, S.G. and Wheeler, C.L. (2000). Pathways in the periphery: Tourism to indigenous communities in Panama. *Social Science Quarterly* 81 (3): 732-749.
- Sofield, T., Bauer, J., Lacy, T.D., Lipman, G. and Daugherty, S. (2004). Sustainable tourism-eliminating poverty (ST-EP): An Overview. Online documents at the website of Sustainable

- Tourism Cooperative Research Centre (STCRC): <http://www.world-tourism.org/step/ST%7EEP%20CRC.pdf> (May 12, 2004).
- Statistics Bureau, P.R.C. (2003). *China Statistical Yearbook - 2003*. Beijing, China Statistics Press.
- Statistics Bureau, S. (2003). *Shaanxi Statistic Yearbook 2003*. Beijing, Chinese Statistics Press.
- Szivas, E. and Riley, M. (1999). Tourism employment during economic transition. *Annals of Tourism Research* 26 (4): 747-771.
- Szivas, E., Riley, M. and Airey, D. (2003). Labor mobility into tourism - Attraction and satisfaction. *Annals of Tourism Research* 30 (1): 64-76.
- Tourism Bureau, T. (2003). Annual report on tourism development in Taibai Tourism Development Zone. Meixian, Tourism Bureau of Taibai Tourism Development Zone.
- van der Waal, C. and Dekker, B. (2000). Game ranching in the Northern Province of South Africa. *South African Journal of Wildlife Research* 30 (4): 151-156.
- Vorlaufer, K. (1999). Tourism and cultural change in Bali. *Geographische Zeitschrift* 87 (1): 29-45.
- Walpole, M.J. and Goodwin, H.J. (2001). Local attitudes towards conservation and tourism around Komodo National Park, Indonesia. *Environmental Conservation* 28 (2): 160-166.
- Wearing, S.L. (2001). Exploring Socio-cultural Impacts on Local Communities. *The Encyclopedia of Ecotourism*. D.B., W. Wallingford, UK., CABI Publishing: 395-410.
- Weiler, B. and Hall, C. (1992). *Special Interest Tourism*. London, Belhave Press.
- Word Bank (2001). *World Development Report 2000/2001: attacking poverty*. New York, Oxford University Press.
- WTO (2002). *Enhancing the economic benefits of tourism for local communities and poverty alleviation*, Madrid Spain: World Tourism Organization (WTO).
- WTO (2004). *Tourism and poverty alleviation: recommendations for action*, Madrid Spain: World Tourism Organization (WTO).