

# A Brief Bibliographic Analysis on Balancing Equitable Tourism Development, Valuing Endemic Species, and Reducing Poverty in Local Communities

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## ABSTRACT

*Madagascar, an island with unique biodiversity and an endemism rate exceeding 80%, faces a paradox between its biodiversity wealth and the poverty of its population. How can the country's complex challenges be explored to foster sustainable and inclusive development through tourism and the rational valorization of endemic species? In response to this problematic, the overall objective is to model more equitable and sustainable tourism development strategies that reconcile socio-economic goals with biodiversity conservation. This article addresses two research questions: What are the characteristics of poverty in community-based organizations (COBA) that induce biodiversity destruction and hinder tourism development? And what strategies can develop tourism through the rational valorization of endemic species by the local population? The hypotheses suggest that COBA poverty leads to irrational exploitation of endemic species, negatively impacting tourism development, and that equitable tourism development helps reduce COBA poverty by valuing endemic species. The methodological approach is based on an in-depth literature analysis focusing on the sustainable development triptych linking COBA poverty, pressures on biodiversity and endemic species, and economic growth induced by equitable tourism management. It also examines the governance of common resources, the economic valuation of biodiversity, and push and pull factors in international tourism. The results reveal that tourism development cannot be achieved without a supply adapted to visitor expectations and the international market, nor without an adequate strategy balancing nature conservation, tourism potential, tourist expectations, and the improvement of the local population's quality of life.*

**Keywords:** *International tourism, Sustainable development triptych, Biodiversity, Madagascar*

## 1. INTRODUCTION

With an exceptional rate of endemism, Madagascar is recognized as a biodiversity hotspot. However, this natural wealth is increasingly threatened by human pressures. The sustainable management of such biodiversity often conflicts with the pressing economic needs of local populations. This contrast between ecological richness and socio-economic poverty represents a significant challenge for the island's sustainable development. Conserving biodiversity while addressing the needs of local communities raises a complex question: How can

Madagascar's intricate challenges be explored to promote sustainable and inclusive development through tourism and the rational valorization of endemic species?

The literature on tourism and sustainable development has highlighted the importance of rationally utilizing natural resources to promote both economic growth and environmental protection (Barbier et al., 1994; Scheyvens, 2011). However, despite these findings, local communities in Madagascar continue to rely on destructive practices such as deforestation and illegal hunting, exacerbating environmental degradation (Jenkins et al., 2011; Reuter et al., 2016). This indicates a significant gap in implementing strategies that integrate local populations' expectations with conservation needs.

In response to this issue, this article aims to explore the socio-economic and environmental challenges associated with sustainable tourism development in Madagascar. It seeks to identify the characteristics of poverty in community-based organizations (COBAs) that lead to biodiversity destruction and hinder tourism development. Simultaneously, it analyzes strategies for the rational valorization of endemic species while involving the local population in tourism initiatives. The proposed hypotheses suggest that COBA poverty leads to irrational management of natural resources, worsening biodiversity degradation and compromising the island's tourism potential. Conversely, equitable tourism development, based on the valorization of endemic species, can contribute to reducing COBA poverty while promoting biodiversity conservation.

This article draws on a literature review examining the sustainable development triptych, commons governance, and push-and-pull factors in international tourism.

## 2. MATERIALS AND METHODS

For this research and the preparation of the article on sustainable and inclusive tourism development in Madagascar, with consideration of tourist expectations, a literature review methodology was utilized. This approach involves the systematic analysis and synthesis of existing works on themes related to poverty, biodiversity, tourist expectations, and sustainable tourism. The initial step consisted of compiling a non-exhaustive set of academic sources, including journal articles, books, institutional reports, and case studies. The main themes examined in the literature review encompass the characteristics of poverty and its effects on biodiversity, strategies for valuing endemic species, sustainable tourism development models, and tourists' expectations and motivations. The island's unique biodiversity, a significant attraction for tourists, was also explored to assess how it can be sustainably managed.

Through the analysis of these sources, the objective identifies the key challenges and opportunities for sustainable tourism development in Madagascar, while considering tourist expectations. This methodology supports the formulation of recommendations based on established practices and lessons learned from previous studies, while also highlighting gaps in the current literature and identifying areas for future research on sustainable and inclusive tourism development in Madagascar.

## 3. RESULTS

### 3.1 Understanding Poverty: A Multidimensional Perspective

The analysis of poverty discourse reveals a consensus among numerous scholars that poverty is a complex and multidimensional phenomenon. Many researchers emphasize the necessity of an approach that integrates economic, social, cultural, and psychological dimensions to better comprehend and address poverty (Sen, 1999; Nussbaum, 2000; Townsend, 1979; Chambers, 1995; Sachs, 2005; Ostrom, 1990). This multidimensional perspective, particularly influenced by Sen's work, contributed to the development of the Human Development Index (HDI) by the United Nations Development Program (UNDP) in 1990, which incorporates health and education indicators in addition to income measures (UNDP, 1990).

Perceptions of poverty differ significantly across cultural contexts and societal norms. Townsend (1979) highlights the concept of relative poverty, which is linked to the social and cultural norms of a society, and emphasizes social exclusion as a critical factor. Chambers (1997), adopting a participatory approach, values local knowledge and individual perceptions, advocating for the direct involvement of those affected in defining their own needs. Lipton (1988) introduces a contextual dimension, stressing the role of social expectations in shaping perceptions of well-being.

In contrast to these subjective perspectives, objective poverty is characterized by adverse material and socio-economic conditions and is typically measured by monetary indicators, such as income-based poverty thresholds. Sen (1999) critiques these traditional measures, proposing instead an approach centered on individuals'

capabilities to pursue lives they value. The capabilities approach, advanced by Sen and later developed by Alkire (2002), highlights the importance of understanding poverty in terms of freedom and the deprivation of capabilities rather than solely income.

### 3.2 Biodiversity and Poverty in Madagascar: A Complex Relationship

Despite residing in an environment characterized by exceptional natural wealth, the Malagasy population experiences endemic poverty, which drives local communities to exert increasing pressure on natural resources. Between 1950 and 2000, Madagascar lost approximately 40% of its forest cover. This deforestation has had direct consequences on biodiversity, resulting in a marked decline in the populations of many endemic species (Allnutt et al., 2008). In southwestern Madagascar, around 80% of deforestation is attributed to shifting agriculture, where farmers clear and burn forests to cultivate subsistence crops (Casse et al., 2004).

Jenkins et al. (2011) document the consumption of bushmeat and illegal hunting, while Reuter et al. (2016) estimate that 28% of lemur species are kept as pets, highlighting the capture of these animals. Other studies, such as those by Reuter (2015), Mittermeier et al. (2019), and Richard (2022), emphasize the trafficking of endemic species and its detrimental impact on their survival. This cycle poses serious threats to Madagascar's biodiversity and disrupts the fragile balance of its ecosystems. However, attributing the pressure on biodiversity solely to the local population overlooks a more complex set of factors. Political and socio-economic conditions (Kull, 2004; Ganzhorn et al., 2007; Jones et al., 2008; Scales, 2014) also play a crucial role in shaping patterns of natural resource exploitation and biodiversity conservation.

### 3.3 Poverty and Resource Exploitation: An In-Depth Analysis

The exploitation of natural resources by local populations in Madagascar, often framed as primary contributors to deforestation, encompasses complex socio-economic and political dimensions. Initiatives such as the Environmental Action Plan (EAP) have not succeeded in reversing this trend, largely due to poverty, which drives unsustainable practices in resource use (Sarrasin, 2007; Fromentin, 2020; 2022). Several alternative hypotheses contribute to this discussion by offering varied perspectives. For instance, Ostrom (1990) demonstrated that local communities, when supported by appropriate rules and institutions, are capable of managing common resources sustainably, challenging the notion that state or market interventions are always necessary to prevent resource depletion.

Hulme and Adams (2001) further argue that rural populations, empowered with adequate resources and education, can play a critical role in conservation efforts. Meanwhile, Evans (1995) and Barbier (2010) emphasize the importance of governments in fostering effective environmental policies, while Porter and Kramer (2006) and Hart (1997) suggest that corporate social responsibility (CSR) initiatives can also drive environmental justice. Moreover, Scott (1985) and Fisher (2010) highlight that the struggles of impoverished local populations are often constrained by oppressive power structures and limited organizational resources.

Political and economic factors, including power imbalances and institutional governance, are pivotal in understanding the unsustainable exploitation of natural resources (Robbins, 2004; Blaikie & Brookfield, 1987). Hardin's (1968) "tragedy of the commons" theory posits that individuals acting independently and in their own interest will deplete shared resources, a concept relevant to Madagascar's challenges. However, Ostrom (1990) critiques this theory by demonstrating that communities can establish effective resource management systems through locally developed rules and institutions.

### 3.4 Economic Valuation of Biodiversity: A Key Strategy

The economic valuation of biodiversity is a key element in supporting conservation efforts. The potential economic benefits derived from ecosystem services, such as pollination, climate regulation, and the provision of raw materials, can provide a compelling rationale for conservation initiatives. Barbier et al. (1994) argue that assigning an economic value to ecosystems can promote preservation policies by highlighting the long-term economic advantages of maintaining intact ecosystems.

Additionally, Goodwin and Roe (2001) propose that the economic valuation of biodiversity through tourism can offer a more sustainable and profitable alternative to the direct exploitation of natural resources. By attracting tourists who are drawn to Madagascar's unique biodiversity, local communities can generate foreign exchange revenues, thereby alleviating pressure on local natural resources.

### 3.5 Tourism and Poverty Reduction: A Winning Duo?

Tourism, when effectively managed, has the potential to contribute to poverty reduction in local communities. Economic models that emphasize the valorization of endemic species and the promotion of ecotourism can provide viable alternatives to the direct exploitation of natural resources. Sustainable tourism development strategies should encompass policies that ensure equitable distribution of tourism revenues and the enhancement of local communities' capacities.

The role of tourism in poverty alleviation and environmental conservation is well-documented, although debates persist regarding its effectiveness and management. Ashley and Roe (2002) suggest that tourism can serve as a tool for economic development, particularly in developing regions. Hall and Lew (2009) emphasize the importance of sustainable planning to regulate the interactions between tourists, local communities, and natural environments, aligning with Lubbe's (2003) argument that tourism may be a more effective conservation strategy than imposing visitor restrictions. Costa Rica is frequently cited as an example of successful ecotourism, where revenues generated from tourism have supported forest conservation while benefiting local communities.

Scheyvens (2011) highlights the concept of pro-poor tourism in Africa, Asia, and Latin America, examining the challenges and opportunities of integrating marginalized populations into the tourism industry. He underscores the need for policies that promote equitable revenue distribution and capacity building within local communities. Mowforth and Munt (2009) support this approach, asserting that for tourism to contribute to sustainable economic growth, its benefits must be fairly distributed among local populations. Chaboud et al. (2004) share this view but caution that while ecotourism holds promise, its implementation can be complex and requires careful management of its environmental and socio-economic impacts.

### 3.6 Economic Impact of Tourism: An Open Debate

The challenges associated with ecotourism are underscored by Honey (2008), who examines the controversies regarding its impact on local cultures and ecosystems. This perspective is supported by Wall (1997) and Ferraro et al. (2021), who argue that the economic benefits of ecotourism do not always lead to tangible improvements in the living conditions of local communities. Honey also critiques the governance and management of ecotourism, asserting that its success hinges on careful oversight to prevent the overexploitation of natural resources.

Martinez-Alier (2002) and Putnam (1993) explore social inequalities and conflicts linked to natural resource exploitation, emphasizing the role of marginalized populations in environmental justice movements. They also stress the importance of integrating social capital into tourism management to ensure equitable and sustainable resource use.

The economic impact of tourism is another area of debate. Marin (1992) and Ghali (1976) investigated the relationship between tourism and economic growth, leading to two main hypotheses: the tourism-led growth hypothesis (TLGH) and the economic growth leading to tourism hypothesis (ELTH). Studies by Eugenio-Martin et al. (2008), Oh (2005), and Katircioglu (2009) reveal that developing countries often face challenges in promoting tourism due to budgetary constraints and economic instability, highlighting the need for economic growth as a prerequisite for tourism development. However, Lee and Chang (2008) and Wijesekara et al. (2022) propose a reciprocal relationship between tourism and economic growth, suggesting that robust economic development can enhance a region's attractiveness as a tourism destination.

### 3.7 Tourism Potential and Motivations: Understanding Tourists' Choices with the Push-Pull Model

Assessing the potential and performance of tourist destinations is a key focus for researchers and tourism industry managers. One widely utilized analytical method in this context is the use of relative tourism maturity indices and tourism competitiveness indices, as introduced by Whitehall and Craigwell (2005). This approach relies on a variety of indicators to evaluate the maturity and competitiveness of destinations, considering factors such as attractiveness, accessibility, service quality, and sustainability.

Tolman (1959) and Dann (1977) contributed to this field with the development of the "push-pull" motivation framework, which offers insights into tourists' motivations when selecting a destination. This model distinguishes between internal "push" factors that motivate individuals to travel and external "pull" factors associated with the attributes of a specific destination that attract tourists. Push factors are internal and intangible, related to personal needs and desires, such as the need for escape, relaxation, cultural exploration, and personal growth. Pull factors, by contrast, are external and linked to specific features of the destination, including tourist attractions, infrastructure, climate, and local culture.

In 2018, prior to the COVID-19 pandemic, international tourist arrivals reached 1.4 billion, contributing \$1.401 trillion in global tourism revenues. Despite this growth, several challenges can negatively impact the tourist experience, including inadequate infrastructure, resource limitations, environmental concerns, weak management and regulatory frameworks, and security issues. To address these concerns, the SERVQUAL model developed by Parasuraman et al. (1988) identifies five key dimensions of service quality that can be used to assess and enhance the visitor experience.

### **3.8 Understanding and Predicting Tourist Behavior: Motivation Factors and Destination Attractiveness**

Traveler motivations are essential for understanding tourist behavior and anticipating future trends (Uysal & Hagan, 1993). Iso-Ahola (1982) and Pearce (1988) identified security, relaxation, social belonging, esteem, and self-actualization as key components driving tourist motivations. Urry (1990) introduced the concept of the "tourist gaze," suggesting that individuals are attracted to experiences distinct from their everyday lives, which transforms places into tourist attractions. Ryan (2002) further explored the relationship between personal expectations and the offerings of tourist destinations, emphasizing the significance of novelty, escape, pleasure, and adventure in shaping the overall travel experience.

In addition to these motivations, considerations related to health, well-being, lifestyle, and the desire for meaningful social contributions or deep cultural interactions also influence tourists' decisions (Guttentag, 2010). Push factors represent the internal motivations driving individuals to travel, while pull factors are the specific attributes of destinations that appeal to tourists. Travel decisions often result from the interplay between these internal and external factors, highlighting the importance of a destination's ability to attract and engage tourists (Uysal & Oh, 1995).

## **4. DISCUSSION**

The results of this study underscore several key challenges for the sustainable development of tourism in Madagascar, particularly the importance of formulating integrated strategies that consider both biodiversity conservation and the improvement of local communities' livelihoods. This conclusion aligns with the work of Hall and Lew (2009) and Scheyvens (2011), who argue that tourism can promote sustainable development when benefits are equitably shared and local communities are actively involved.

First, it is essential to implement policies that ensure the equitable distribution of tourism revenues. This involves not only redistributing the financial benefits of tourism to local communities but also enabling these communities to participate in the management and development of tourism initiatives. Ostrom's (1990) research on commons governance provides valuable insights, demonstrating that well-organized and supported local communities can create governance systems that both protect natural resources and address economic needs. This approach is particularly relevant in Madagascar, where biodiversity represents a vital natural heritage that must be conserved and economically valued through tourism.

For such policies to be effective, they must be complemented by innovative approaches. Strengthening social capital, as theorized by Putnam (1993) and supported by Woolcock and Narayan (2000), could significantly enhance the sustainable management of natural resources. By reinforcing social networks, norms of reciprocity, and trust within communities, Madagascar could foster more resilient and effective forms of cooperation for managing tourism initiatives.

In this context, community-based tourism (CBT), which has demonstrated its effectiveness in various regions, including Latin America and Southeast Asia (Scheyvens, 1999; Murphy, 1985), presents a promising opportunity for Madagascar. This model emphasizes the active participation of local communities in the management of tourism activities, ensuring not only a more equitable distribution of income but also a stronger sense of ownership over tourism projects by local populations.

Another potential strategy is the introduction of payment for ecosystem services (PES) mechanisms, which have been successfully applied in countries like Costa Rica. These mechanisms provide financial compensation to local communities for their conservation efforts, acknowledging the economic value of ecosystem services such as forest protection and habitat preservation (Wunder, 2007; Pagiola et al., 2002). In Madagascar, a PES system could incentivize communities to engage more actively in biodiversity conservation by offering regular payments that contribute to improving their livelihoods.

However, the transition to sustainable tourism will not be without challenges. These include the need to rethink existing economic models, overcome institutional barriers, and ensure the active participation of all stakeholders, including private enterprises, local communities, and governments. The success of these strategies

will depend on the willingness of both local and international actors to engage in inclusive partnerships, recognizing mutual interests and promoting the common good.

## 5. CONCLUSION

Madagascar, characterized by its remarkable biodiversity with an endemism rate exceeding 80%, faces the paradox of this natural richness coexisting with widespread poverty among its population. Achieving sustainable and inclusive development necessitates the implementation of equitable tourism strategies that both preserve biodiversity and enhance local living conditions.

The findings indicate that the multidimensional poverty experienced by local communities contributes to biodiversity degradation, which in turn hampers tourism development. The economic valorization of biodiversity through tourism presents a viable alternative, offering opportunities for income generation while alleviating pressure on natural resources.

Sustainable management of natural resources, coupled with strict environmental policies and equitable distribution of tourism revenues, is critical. When properly managed, tourism has the potential to support both poverty reduction and environmental conservation, as evidenced by the model applied in Costa Rica.

For tourism development to succeed in Madagascar, an inclusive and participatory approach is essential, one that actively involves local communities and incorporates socio-economic, cultural, and environmental dimensions. This strategy will not only safeguard the island's unique biodiversity but also contribute to the improvement of the population's living conditions.

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