

貧困に関する概念規定と課題

—観光学研究への展望—

A Review on the Definition of Poverty in Anti-Poverty Tourism Research

徐 翰林
XU Hanlin

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1. INTRODUCTION

Poverty is a pervasive global phenomenon (Scheyvens, 2007), and the fight against poverty has been associated with human history at all times (Deaton, 2013). This is more urgent for developing countries that are pushing for economic growth. Tourism, in particular, is the most viable growth path for developing countries due to relatively low entry barriers and buoyant growth (Hall, 2007). Therefore, tourism development has been widely used as a tool or strategy to improve national economic conditions and reduce the level of poverty in many developing countries (Croes and Vanegas, 2008). Tourism, which has brought an increasing “multiplier effect” and the model of tourism-business linkage not only creates jobs in the tertiary sector, but also encourages growth in the primary and secondary sectors of industry. In other words, regional economic growth is predominantly set as the premier target of national tourism development while poverty alleviation is either considered as a sub-goal or natural outcome of economic growth (Ashley, Boyd, and Goodwin, 2000). As a result, policymakers usual-

ly pay attention to the expansion of tourism scale and to the achievement of the goal of poverty reduction naturally (Christies, 2002). However, according to Deaton (2013), economic development is always accompanied by inequality, because the rich people become richer while the income of extremely poor people remains unchanged for thousands of years. History has shown that economic development does not eradicate extreme poverty. Therefore, besides focusing on trickle-down theory in anti-poverty tourism research, understanding poverty itself is also critically important.

2. RESEARCH OBJECTIVE

The understanding of poverty varies according to time, culture, and places, which makes tourism difficult to reach the goal of eliminating poverty. The objective of this paper is to improve the capacity of anti-poverty tourism approach analysis in poor countries, especially highlights the neglect of research on poverty dynamic in pro-poor tourism. This paper documents the different angles of poverty definitions, tracking the shifting understandings of poverty

from absolute or relative to dynamic after introducing some key and new ideas in defining poverty. The discussion is set under an international context, and drawing attention to the limitations and advantages of each poverty definition. It provides a basis for anti-poverty tourism approach and raises questions for further discussions.

3. DEFINITIONS OF POVERTY

Poverty, which can be expressed in numerous ways, is generally the state of one being hungry, displaced, and unemployed (Stevenson, 2010). But the definition of poverty is very vague. In the past hundred years, the concept of poverty has been discussed thoroughly from diverse

Table 1 : Definitions of Poverty

Key Ideas and Authors	Explanations
Lack of basic resources (Rowntree, 1901)	Poverty is the lack of access to basic needs, including food, safe drinking water, and shelter.
Lack of physical, human, and social resources (Townsend,1979 ; Friedmann,1992)	A condition is characterized by severe deprivations of 1) basic human needs, such as sanitation facilities, health, education and information ; 2) resources and participation in social institutions ; 3) freedom.
Entitlement approach (Sen, 1981, 2001)	Sen defined poverty from 3 aspects : "Exchange entitlement set" (the lack of basic needs of the poor), "entitlement set" (the vulnerability of the poor and lack of capacities and opportunities), and E-mapping (social environment, policy and other external factors).
Poverty Dynamic (Bane and Ellwood,1983 ; Stevens, 1994)	Poverty is a changing condition ; individuals can be counted in and out of poverty over time. Thus, poverty can be temporary or permanently.
Lack of voice, rights and independence (Chambers and Conway, 1992 ; Sen,1999 ; World Development Report, 2000/2001)	Poverty is not just about lack of basic need, which should be provided by outside agency. It also includes people's vulnerability to external shocks, including the lack of voice and rights, which highlighted poverty in terms of people-centered perspective.
Exclusion and Well-being (Silver, 1994, 2007;Taket, Crisp, Nevill, Lamaro, Graham, and Barter-Godfrey, 2009)	Social exclusion, a concept that refers to the process in which people and groups are denied full access to rights, opportunities, and resources. Generally, it includes social exclusion (exclude consumer, exclusion from/within labour market etc.), cultural exclusion, and political exclusion.
Capabilities and Freedoms (Sen, 1999)	Based on the concept of capabilities, Sen has extended to argue that poverty is about the without five freedoms : political freedoms, economic facilities, social opportunities, transparency guarantees, and protective security.

perspectives (Rowntree, 1901; Sen, 1981; Bane and Ellwood, 1983; Silver, 1994; Graham and Barter-Godfrey, 2009; Holden, 2013). From the initial perspective of income, ability poverty and transient poverty have been added to the classification of poverty. It indicates that the characteristics of poverty are described more and more comprehensive. Table 1 excerpts the key definitions that are still often cited.

Poverty as a global problem is a complex issue involving economic, political, and social issues. The understandings on poverty listed in Table 1, although expressed differently, have an inherent association that can be clarified in Figure 1.

Poverty is never neutral, as shown in Figure 1. It is the consequence of insufficient physical necessities (such as house, food, water) and capability, which makes the poor difficult to survive; it is the absence of social resources, such as basic infrastructures of health clinics and schools, which unables the poor to enhance well-being; it lacks of voice, right, and freedom, thus

the poor are vulnerable to exploitation and humiliation. In addition, because people can move in or out of poverty over time, poverty is also dynamic. Although poverty has been described distinctively, the internal logic can be broadly summarized Table 1 as the followings:

- (1) Poverty always links with “backward” and “difficult,” relevant to the lack of material and services. Normally poverty is defined as “low income.”
- (2) Poverty is about the living condition below the minimum living standard that is recognized in each society.
- (3) Poverty is a changing condition that varies over time.
- (4) Poverty is a multidimensional phenomenon that includes education, health, voice, and human right, etc.

Thus, Figure 1 further concludes the basic features of poverty, and classifies poverty into four aspects according to the above analysis: absolute, relative, multidimensional, and dynamics. Absolute poverty is a living condition that

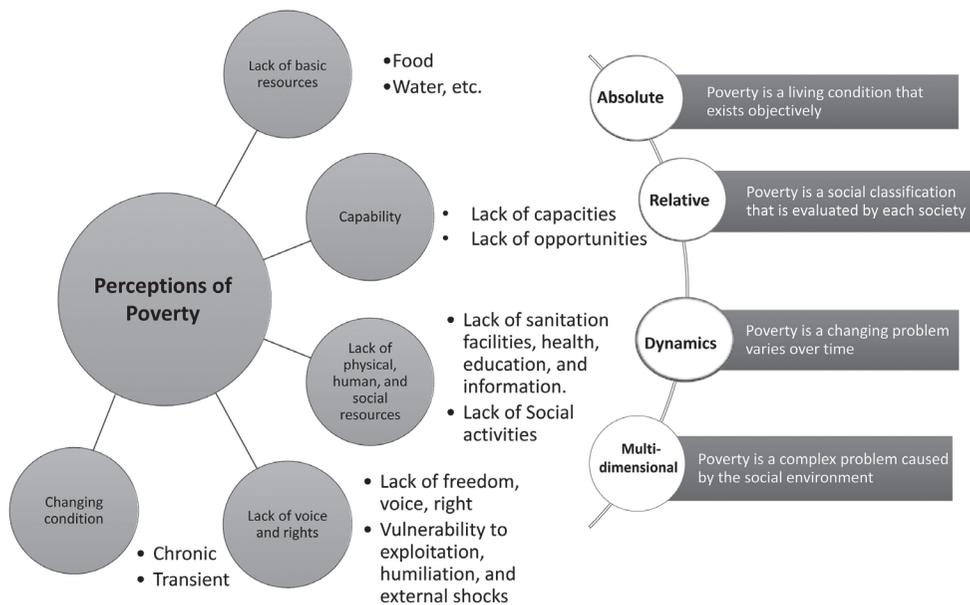


Figure 1: Key Findings from “Definition of Poverty” Studies

exists objectively; relative poverty is a social classification that is evaluated in each society; multidimensional poverty is a complex problem caused by the social environment; poverty dynamic refers to a changing poverty condition varies across time, place and culture.

This classification implies that the central aspect of poverty, absolute poverty, fails to provide us with a full understanding. Although absolute poverty closes to the state of poverty, poverty itself is not a simple monetary concept; rather, it is multidimensional and dynamic. Especially, poverty is not static, and the problem of poverty dynamics has been neglected in anti-poverty researches until recent years. Thus, this paper highlights the shifting understanding of poverty from the basic living requirement and relative income to multidimensional and dynamic construct. In order to provide a theoretical base of anti-poverty tourism research, the limitations and advantages of each poverty definition are analysed next.

3.1 Absolute Poverty

Absolute poverty is defined as a condition where families or individuals don't have enough income to maintain the minimum physiological requires, such as food, housing, clothing, and other necessities (UNDP, 1995; Sachs, 2005; Walker and Bantebya-Kyomuhendo, 2014). Various national agencies and investigators adopted the definition of absolute poverty (Laderchi, Saith and Stewart, 2003; Pradhan and Ravallion, 2000). These institutions and researchers tend to estimate a minimum level of physical requirement, normally measured in terms of calories or nutrition for basic physiological needs, and then convert the nutrients and quantity of food to the amount of money based on its market value. Therefore, absolute poverty is about survival, referring to the income situation which is difficult to maintain the minimum living needs.

However, in different time, and regions, individuals have distinctive necessities. The measurement of "the minimum number of essential goods" is difficult to ascertain. Although nutrition can take the place of specific commodities to eliminate some differences, different combinations of nutrients in food can result in different prices. Even the same combination costs differently in correspondence with different regions. In this case, using the uniform poverty line in Africa and the United States is clearly unreasonable. Therefore, with the development of human society and expansion of regional differences, only emphasizing the absolute poverty is not convincing. For rich countries, Fritzell, Hertzman and Blomgren (2015) stressed that relative poverty, which has close associations to overall inequality, should be concerned rather than absolute poverty.

3.2 Relative Poverty

Relative poverty describes the condition that people do not have enough resources to meet socially recognized needs and to participate in social activities (Lister, 2004; Jänis, 2014). Subsequently, the measurement of poverty shifts from the minimum number of essential goods to average social level (Beaudoin, 2007; Jänis, 2014). With the development of society, there are plenty of poor people having food to eat and clothes to wear, but whose standard of living is still much lower than the average level of the whole society. Should be noticed is that relative poverty is different from the feeling of deprivation. The feeling of deprivation refers to a kind of emotion while relative poverty is established on specific conditions. Therefore, a person with the feeling of deprivation doesn't means that he is living in poverty, while the feeling of deprivation is just an expression of their condition for the families or an individual living in poverty. Relative deprivation can be understood as a lack

of resources to sustain the average living standard of the society (Walker and Smith, 2002). Fuchs (1967) proposed the concept of relative poverty and relative poverty standard explicitly. He estimated Americans in poverty by using a relative poverty standard by determining the poverty line at 50% of the median value of national income distribution, which has been widely used in Western European countries. However, relative poverty doesn't work well in two extreme societies: one is a primitive society where the average income has just reached the minimum living standard while the other is a highly-developed society, which is generally very rich. The conditions of the poor in the above two societies are totally different, which in case using relative poverty approach alone to measure poverty will cause many problems. Thus, relative poverty must also combine a core of absolute deprivation to have a sense of absoluteness. From the above analysis, the weaknesses and advantages of relative poverty and absolute poverty have been clarified. Both of them are incomplete, but provide us two complementary perspectives to study poverty, so they should be combined in poverty analysis.

3.3 Multidimensional Poverty

With the social-economic development, poverty is defined from simple absolute/relative poverty to more comprehensive classifications. Bourguignon and Chakravarty (2003) defined that poverty is not a one-dimensional phenomenon (e.g. "only" a lack of money) but a multidimensional issue that caused by social exclusion, lack of psychological well-being, human rights, etc. Similarly, Duclos, Sahn, and Younger (2006) pointed out that poverty is not a pure condition of monetary disadvantages, but also incorporates non-material perspective. Sen (1992, 1999) who applied entitlement approach in poverty research defined poverty as a condition where

people's exchange entitlement set does not reach the basic living requirement. In entitlement approach "exchange entitlement set" and "entitlement set" respectively reflect the poor's lack in fundamental needs and in capabilities and opportunities. Entitlement mapping (E-mapping) is the reflection of external factors as social environment and policy. More recently, UNDP proposed HPI (Human Poverty Index) and Multidimensional Poverty Index (MPI) in the Human Development Report in 2008 and 2010 for developing countries. HPI and MPI consist of three components: health deprivation, education deprivation and decent life deprivation. However, although they are wider measures of 'development' than GDP alone, they do not reflect inequalities, human security, empowerment, etc., as stated in the Human Development Report (2008, 2010). Another problem is that the three dimensions of the index are weighed equally, which made HDI and MDI subjective.

3.4 Poverty Dynamic

Because some of the poor are not poor all the time (Yaquub, 2000), it is necessary to consider the observation periods. Many students who are poor now may have good lifetime prospects, so they should not be considered truly miserable. Bane and Ellwood (1986) distinguished the difference between the newly poor and the poor in particular. Ravallion (1988) classified aggregate poverty into transient poverty and chronic poverty. Transient poverty means a household or a family only living in indigent for a specific time period while chronic poverty refers to live in poor in all the time of a certain time period. Rodgers and Rodgers (1993) pointed that since transient poverty and chronic poverty has different contributory factors, they need separate policies to reduce poverty. Usually, chronic poverty refers to indigent living for more than 5 years, ranging from entering poverty to get out

of it. In addition, Hulme, Moore and Shepherd (2001) classified poverty dynamic into a five-tiered categorization of poverty: always poor, usually poor, churning poor, occasionally poor and never poor. Although the origins of the concept can be dated back to 1980s, it has raised broad concerns recently. In recent researches, Ward (2016) considered two causes of household vulnerability, low expected income and high-income variability; the results showed that there exist different characteristics between vulnerable households and non-vulnerable households, especially in terms of income changing. Their analysis was based on a balanced panel of rural China from 1991 to 2006, and they also found that most samples have shifted from chronic poverty to transient, but this change is not constant with time and places. Similarly, Kimberlin and Berrick (2015) focused on the causes and impacts of chronic and transient poverty on children's health and development. According to the empirical analysis results on the data in the United States, they suggest using distinctive policies to reduce poverty since the causes and impacts between chronic poverty and short-term poverty are different, particularly for children. Seker and Dayioğlu (2015) indicated that the phenomenon of poverty is a short-lived status in Turkey by looking at poverty entry, exit, re-entry rates, and exit rates conditional on time spent in poverty. Poverty dynamic analysis can assist the government to capture the change of income and consumption among the poor, grasp the overall trends of poverty and distinguish the specific individuals or families who are in chronic poverty or transient poverty. However, there is an unavoidable problem found in the literatures of poverty dynamic that the measures of transient or chronic poverty and research methods are controversial. Davis and Baulch (2011) pointed out that distinct methods lead to very different conclusions of poverty dynamic research in Bangladesh. In ad-

dition, although poverty dynamic is an important supplement of other poverty definitions, it cannot directly answer the question of what is poverty.

4. DISCUSSION AND CONCLUSION

This study documented the diverse understandings of poverty. Unpacking understanding of poverty clarifies the possible reasons of why people get into poverty. It is mainly because of the lack of physical necessities, capability, social resources, voice, right, and freedom, etc. Sen (1981, 2001) further defined poverty into three aspects: "Exchange Entitlement Set" (the lack of basic needs of the poor), "Entitlement Set" (the vulnerability of the poor and lack of capacities and opportunities), and "E-mapping" (social environment, policy and other external factors). According to Sen's Entitlement approach, tourism has the potential on reducing poverty in two ways: increasing the Entitlement Set of the poor, or changing the E-mapping. Entitlement Set aims at increasing the poor's capacity and creating more opportunities.

The definition of poverty has been developed from the original absolute, relative to multidimensional and dynamic, while among pro-poor tourism research, only few studies included a substantive and updating discussion of poverty. In order to improve the capacity in anti-poverty tourism analysis, this paper focuses on the concept of poverty itself. The analysis starts from the unpacking terms of poverty, then moves on to the discussion of four poverty perspectives: absolute, relative, multidimensional and dynamic. Especially, it analyses the limitations and advantages of each poverty definition, which highlights the neglect of poverty dynamic. To sum up, poverty is conventionally defined in terms of absolute, relative and multi-dimensional. However, each definition has its own limitations as summarized in Table 2, so they cannot define

poverty entirely and all fail to provide us with a comprehensive understanding of poverty. Overall, the concepts of absolute and relative poverty are still playing dominated roles in anti-poverty tourism research, because of their comparatively objective and easy measurements.

Because poverty is a changing condition, the research should not concentrate only on static poverty that has already occurred. Therefore, the problem of poverty dynamic should be well considered in the further tourism research.

Table 2 : Limitations of Each Poverty Definition

Concepts	Perspectives	Weakness
Absolute Poverty	Survival	The “minimum number of essential goods” is difficult to ascertain
Relative Poverty	Relative to national average income	Not suitable in cross country comparison
Multidimensional Poverty	Non-money factors	Hard to quantitative non-money factors
Poverty Dynamic	Time variation	Partly subjective ; it cannot define what is poverty directly

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