



Determinants of livelihood diversification: The case wildlife tourism in four coastal communities in Oaxaca, Mexico

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ARTICLE INFO

Keywords:

Diversification
Wildlife tourism
Mexico

ABSTRACT

Diversification is a process by which households increase the number of economic activities in different sectors to improve their well-being and chance of survival. The aim of this research is to study the determinants of livelihood diversification with a specific emphasis on wildlife watching in the coastal communities of Oaxaca, Mexico. Based on household surveys, two econometric models were used to examine the differences regarding the asset determinants for those households increasing the number of economic activities and those involved in wildlife tourism. The results reveal four common variables distributed between capitals and specify that average household age, environmental consciousness, characteristics of the land, membership or participation in an organization (cooperative) and government transfers are determinants of a household's diversification into wildlife tourism. Policy recommendations include focusing on households with young people, providing support for social capital and policy coherence to guarantee basic needs and tourism planning design.

1. Introduction

Rural household economies use different strategies such as diversification, migration and the intensification of production to survive and manage risk (Ellis, 2000). In particular, diversification, which is recognized as a core strategy of rural livelihoods (Alobo Loison, 2015; Mushongah & Scoones, 2012), is defined as the process by which households develop a portfolio of activities including tourism and diverse social assistance capacities for surviving and increasing their well-being (Ellis, 2000). Some scholars refer to diversification as a sectorial shift of rural activities away from farm to non-farm activities (Start, 2001) as part of the process of structural transformation. Still other scholars define diversification as income strategies by which households increase the number of economic activities in any sector (Alobo Loison, 2015), that is, working in traditional farm activities while simultaneously working in secondary or tertiary sector activities (Hernandez Cruz, Bello Baltazar, Montoya Gomez, & Estrada Lugo, 2005). Therefore, diversification is a process through which households increase the number of their economic activities across one or more sectors to survive and improve their well-being. Diversification strategies depend on the regional context and household assets (Mushongah & Scoones, 2012). Assets comprise different types of capital

endowments that are both tangible and intangible and reflect the capabilities and skills necessary to survive in rural areas (Bebbington, 1999; Chambers & Conway, 1992; Ellis, 2000). Consequently, a household will have poverty-related problems if it is deficient in these assets; however, if such assets have been accumulated, they can be invested in future productive activities (Adato, Carter, & May, 2006; Giesbert & Schindler, 2012; World Bank, 2008).

Diversification is evident in Latin America, for 20–30% of rural households engage in off-farm employment that represents between 40 and 50% of their income (Reardon, Berdegue, & German, 2001; Davis et al., 2010). In Mexico, it has also been demonstrated that diversification is a livelihood strategy, as off-farm self-employment and wages represent 49.2% of total household income (Cerón & Yúnez-Naude, 2015). Off-farm self-employment activities often consist not only of the transformation of primary goods to make artisanal products or food to sell locally but also the provision of local transportation and tourism services. This research has a particular interest in analysing wildlife tourism as a diversification strategy linked to ecosystem services conservation that is necessary for social well-being (Díaz et al., 2015). Ecosystem services provide direct and indirect benefits to society through the extraction, indirect use or transformation of commercial goods. For example, forestry, agriculture, livestock and fisheries are

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primary sector activities that depend on natural resources that can be extracted sustainably. Additionally, non-timber products, such as fungus, orchids and bush meat hunting, are important resources for rural household economies and their food security (López-Feldman, 2014). Wildlife tourism instead uses recreational ecosystem services, and this research is interested in analysing this activity as a diversification strategy that can potentially be sustainable. Wildlife tourism can be divided into extractive activities, such as sport hunting, and non-extractive activities, such as wildlife watching. Wildlife watching is defined as “a human recreational engagement with wildlife wherein the focal organism is not purposefully removed or permanently affected by the engagement” (Duffus & Dearden, 1990). Essentially, wildlife watching aims to increase the probability of positive encounters with wildlife while protecting wildlife resources (Reynolds & Braithwaite, 2001). Wildlife watching differs from nature tourism, which is defined simply as travel to enjoy and experience nature (Hunt, Durham, Driscoll, & Honey, 2015), and this activity can be considered ecotourism when ethical values and positive environmental and cultural outcomes are achieved (Hunt et al., 2015). The economic revenues provided by wildlife watching are substantial in some countries (Avila-Foucat, Gendron, Revollo, Popoca, & Ramírez, 2017), and Reynolds and Braithwaite (2001) have found that approximately 40% of international tourism is wildlife-related. In Mexico, wildlife watchers represent 36% of nature tourists (CESTUR, 2006), and they provide 26.5% of revenues from this type of tourism. Economic revenues are obtained by tour guide services, accommodations, food services, and other local sales and services. Indeed, in many coastal communities, wildlife tourism is an important household diversification strategy, but the determinants of a community's decision to enter into this activity have rarely been studied compared to the issue of the effect of tourism on household assets (Mbaiwa, 2011; Qian, Sasaki, Jourdain, Minsun Kim, & Shivakoti, 2017; Shoo & Songorwa, 2013; Simpson, 2009). Another area that has been studied is that of asset relevance to community capacity-building for tourism development (Bennett, Lemelin, Koster, & Budke, 2012) and community participation in tourism planning (Bello, Lovelock, & Carr, 2016). Scholars in Mexico have examined the effects of wildlife tourism on nature and society (del Rio & Brenner, 2012; Hernandez Cruz et al., 2005), while few studies tackle determinants of demand (Avila-Foucat, Sánchez Vargas, & Aguilar Ibarra, 2016, 2017) and wildlife management policies (Avila-Foucat & Perez Campuzano, 2015; Weber, Garcí a-Marmolejo, & Reyna-Hurtado, 2006). Meanwhile, the assets that influence household diversification toward wildlife watching have not previously been a focus of study. Therefore, this paper examines the links between the assets and economic activities of rural households in Oaxaca, Mexico, with a specific emphasis on wildlife watching as a household strategy that is linked to the sustainable use of natural resources.

For that purpose, we describe the discussion about the influence of assets on livelihood strategies in general, followed by the relationship between tourism and assets.

In many parts of the world, human capital is a key factor in rural diversification and well-being (Ansoms & McKay, 2012; Liu & Liu, 2016; Mushongah & Scoones, 2012; Winters et al., 2009). Bhandari (2013), for example, finds that family labour, particularly by children, benefits agricultural activities in India. In the case of Mexico, the empirical evidence suggests that education, work experience, and age are the household determinants for selecting economic activities (Yúnez-Naude & Meléndez, 2007) and for diversification (Fierros & Avila Foucat, 2017; Mora Rivera & Cerón Monroy, 2015). In addition, De Janvry and Sadoulet (2001) find that education is the main element allowing households to engage in remunerated non-agricultural activities. In most rural communities, primary school is the highest level of education, and off-farm activities often require more specialized skills such as accounting, good writing and public relations capacities.

Financial capital has been studied extensively, and the results show that market access, income, access to credit, and savings are important

factors when making financial decisions such as livelihood transitions (Ansoms & McKay, 2012; Barbieri & Mahoney, 2009; De Janvry & Sadoulet, 2011; Ellis, 2000; Mushongah & Scoones, 2012). Government transfers are also important, especially in developing countries such as Mexico (Fierros & Avila Foucat, 2017; Mora Rivera & Cerón Monroy, 2015).

Another important asset that scholars have identified is social capital. Key aspects of this include mutual cooperation among households (Barbieri & Mahoney, 2009; Mushongah & Scoones, 2012), institutional networks (Bhandari, 2013), and migration (Mushongah & Scoones, 2012). Community organization is another important factor for income strategies, especially in countries such as Mexico, where land tenure mainly takes the form of *comunidades* and *ejidos*, a tenure system by which a portion of the land is shared in common by all landowners and other portions are privately owned by each landowner. Decisions regarding land are made in an assembly, and one of the rules is that all members must participate into community improvements (*tequio*). Mexico has a vast literature on social capital (Rodríguez, Avila-Foucat, & Maldonado, 2016), and it has been proven that it influences livelihood strategies at the *ejido* level (Winters, Davis, & Corral, 2002). Furthermore, research on the role of institutions, assets and local environments in livelihood diversification among rural households in Mexico has been performed using the sustainable livelihood approach by Poole, Gauthier, and Mizrahi (2007), Robles and Fletcher (2008), and Robles (2010). These authors emphasize the need for a sustainable development policy for rural indigenous communities in Mexico that incorporates social participation, environmental conservation, socio-economic development, and the welfare of rural communities (Robles & Fletcher, 2008; Robles, 2010).

Land is the main variable used in natural capital due to its link to agricultural production (Fang, Fan, Shen, & Song, 2014). A study of 24 villages (with fewer than 5000 inhabitants) in Mexico found that ownership of an additional hectare of rain-fed land increased the probability of household participation in the production of staple crops by 4.3% (Yúnez-Naude & Taylor, 2001). However, the natural capital of households includes much more than land. Specifically, wildlife is important not only for daily consumption and subsistence (López-Feldman, 2014) but also for diversification into wildlife tourism activities (Avila-Foucat et al., 2017) and other aspects of biodiversity.

The hand tools and machinery necessary for productive activities are the variables used to describe physical capital (Donovan & Poole, 2014). Communications infrastructure, roads and distance to urban centres are critical to market and service access and are also included in this category (Bhandari, 2013; Duchelle, Almeyda, Wunder, Börner, & Kainer, 2014; Pat et al., 2008; Riveros-Cañas, Rodríguez-Robayo, & Cesín, 2016). Physical capital is also related to the infrastructure necessary for agricultural production and transportation, along with household living conditions such as house infrastructure, appliances and basic needs (Ansoms & McKay, 2012; Ulrich et al., 2012).

With regard to tourism, the effects of this activity on livelihood have been assessed in the literature (Mbaiwa, 2011; Qian et al., 2017; Shoo & Songorwa, 2013), and the results reveal tourism's positive effects on income and employment (Hernandez Cruz et al., 2005; Hunt et al., 2015; Wishitemi, Momanyi, Gichana Ombati, & Makonjio Okello, 2015), education, skills, small business creation and health (Wishitemi et al., 2015). However, many problems regarding economic distribution (Hernandez Cruz et al., 2005; Hunt et al., 2015) and community development (Wishitemi et al., 2015) have also been identified. Another approach to analysing the effects of tourism is the sustainable livelihood approach (SLA). Tao and Wall (2009) argue that when tourism is introduced into a community, it complements rather than displaces existing activities, and they propose SLA as a more integrated approach to analysing these effects. Similarly, Simpson (2009) uses SLA to assess the impacts of tourism on community development. Qian et al. (2017) measure the differences between assets in community-based tourism (CBT) and lease-operation tourism. They concluded that the overall

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