Poverty and Inequality: Exploring the Role of Tourism in Brazil's Northeast

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Abstract

With poverty and inequality continuing to persist around the world, eradicating both has become one of the greatest challenges for humanity. Yet, tourism has been considered as a panacea for achieving development, overcoming poverty and reducing inequality. Nonetheless, it remains unclear as to whether tourism contributes to reducing poverty and inequality or, in fact, increases both. This study explores the relationship between tourism, poverty and inequality from a political economy perspective. A multidimensional view on poverty is adopted and inequality is considered in the distribution of impacts, which is underpinned by Sen's capability approach. The political economy context of this study is analysed by using Frank's dependency theory and by drawing on Giddens' understanding of power in his structuration theory. The study is conducted in a coastal tourist destination in the Northeast of Brazil and applies a mixed-methodological approach that combines quantitative value chain analysis (VCA) and qualitative photo-elicitation and interviews. The results show that tourism has a significant impact on reducing income-poverty through providing job opportunities as micro-entrepreneurs and in un-/ and semi-skilled positions to locals from a non-white background. In contrast, tourism business owners and those in higher managerial positions are people from a white background who have moved to the Northeast. This disparity found mirrors classic development patterns in developing countries and seems to be characteristic of the coastline in Brazil's Northeast. An analysis of the value of tourism-related income through consumption patterns emphasises the importance of tourism for local people to sustain their well-being, whilst business owners and managers do not seem to depend on tourism since they are able to draw on other financial sources. Individual opportunities and wider societal benefits provided by tourism are highly valued by locals, particularly, the opportunity of having access to and contact with the rest of the world through engagement with international tourists. In contrast, tourism business owners and managers place value on living in a natural environment and having a relaxed lifestyle. Despite the value of tourism for both groups, challenges and costs of tourism development are also identified. A key constraint is found to exist in racial disparities, in that the white-skinned elite is perceived to prevent non-white locals from generating income and sustaining their livelihoods. Wider structural constraints for tourism development lie in the dependency of the destination on the municipality and a neighbouring city; nonetheless, despite existing structural constraints, agency becomes evident, suggesting that people exert some degree of power over tourism development and their livelihoods. This study provides deeper understanding of multidimensional poverty, and particularly, in connection to inequality. Furthermore, it adds to existing knowledge on power relations within and between different spatial scales and power as interplay between structure and agency.

Contents

List of figures

List of tables

List of photos

List of abbreviations and acronyms

BMI	Business Monitor International
BNB	Banco do Nordeste do Brasil
BR$	Brazilian Real (Brazilian currency)
BRICS	Brazil, Russia, India, China, South Africa
BSH	Hospitality investment consulting company in Brazil
CBT	Community-based tourism
CGE	Computable general equilibrium
DMP	data management plan
ERBR	Espinhaço Range Biosphere Reserve
EMBASA	Empresa Baiana de Águas e Saneamento S.A (Water company of the State of Bahia)
EMBRATUR	Instituto Brasileiro do Turismo (Brazilian Tourist Board)
ESRC	Economic and Social Research Council
e.g.	exempli gratia (for example)
et al	et alia (and others)
GBP	Great British Pound
GCE	Computable General Equilibrium
GDP	Gross Domestic Product
HDI	Human Development Index
IADB	Inter-American Development Bank
ibid	ibidem (the same source as previously references)
IDS	Institute of Development Studies
i.e.	id est (in other words)

INEMA	Instituto do Meio Ambiente e Recursos Hidricos (Authority for environment of the State of Bahia)
IPCIG	International Policy Centre for Inclusive Growth
ITC	International Trade Centre
k	kilo (equals 1,000)
LPP	Littoral pleasure periphery
m	million
MDI	Multidimensional Development Index
MTur	Ministério do Turismo (National Ministry of Tourism)
NACLA	North American Congress on Latin America
NCRM	National Centre for Research Methods
ODI	Overseas Development Institute
OEC	Observatory of Economic Complexity
%	per cent
PMDB	Brazilian Democratic Movement Party
PNT	Plano Nacional de Turismo
PRN	Party of the National Reconstruction
PRODETUR-NE	Programa de Desenvolvimento do Turismo - Northeast (Investment Programme for Tourism Development in the Northeast)
PSDB	Brazilian Social Democracy Party
PT	Workers' Party
PPT	Pro-poor tourism
SAM	Social Accounting Matrix
SETUR	Secretaria de Turismo do Estado da Bahia (Tourism department of the state of Bahia)
SHUREC1	Sheffield Hallam University Research Ethics Checklist

SHUREC2a	Sheffield Hallam University Research Ethics Approval
SNV	Netherlands Development Organisation
SoL	Standard of Living
SUS	Sistema Único de Saúde (National Healthcare System, Brazil)
US$	US Dollar (US currency)
UN	United Nations
UNDP	United Nations Development Program
UNRISD	United Nations Research Institute for Social Development
VCA	Value chain analysis
WDR	World Development Report
WTTC	World Travel and Tourism Council

Candidate's statement

I hereby declare that this thesis is my own work and effort and that it has not been submitted anywhere for any award. Where other sources of information have been used, they have been acknowledged.

Signature: T. Winter

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1. Introduction

1.1. Study context

'OK Google - what is development?' - provides about 4,100,000,000 results in 0.41 seconds pointing out a diversity of definitions and conceptualisations. Kanbur (2006:5) believes that *"there is no uniform or unique answer"* since development depends *"on value and on alternative conceptions of the good life"*. Thus, there has been extensive debate on defining development making it a 'contested', 'complex' and 'ambiguous' concept (Thomas, 2000). In fact, *"it would be an understatement to say that the definition of 'development' has been controversial and unstable over time"* as Sumner and Tribe (2008:10) argue. Chambers (2004) puts forward that development is about good change, whilst acknowledging that the question of 'what is good' is value-laden. Cupples (2013:14) states that

> *"development is about generating greater well-being and standards of living. It explicitly entails a need and desire to bring about change to a situation that is deemed by some to be unacceptable or undesirable. What is to be done to address this state of affairs can never be objectively determined".*

A situation that is probably deemed by most people 'to be unacceptable or undesirable' is living in poverty and inequality. To bring about change the UN (2018) puts forward that people need to be given more freedom and opportunities to live lives they value. Despite extensive efforts from policy-makers, practitioners, scholars and activists, and people themselves, eradicating poverty through providing opportunities and reducing inequality remain the greatest challenges of humanity (IDS, 2018; UNDP, 2018).

Development and tourism are distinct phenomena - yet considered to be increasingly interrelated (Bricker, Black & Cottrell 2013; Holden, 2013; Knight, Cottrell, Pickering, Bohren & Bright, 2017; Scheyvens, 2011). The interrelationship stems from viewing tourism as a panacea for achieving development, overcoming poverty and reducing inequality, in order to reach greater standards of living (Mowforth & Munt, 2016; Sharpley & Telfer, 2015). However, instead of evaluating how tourism can improve people's lives through providing valuable opportunities, tourism research tends *"to be narrowly focused on economic impacts"* using income as key indicator (Spenceley & Meyer, 2012:300), which is grounded in the assumption that economic growth automatically transfers into greater opportunities. Whilst the importance of income as a mean to development is acknowledged, it is emphasised that it is not *"an end in itself"* (UN, 2018:online). The need to take broader perspectives and use theoretical frameworks to develop understanding of the relationship between tourism and poverty has been strongly argued by tourism scholars (e.g. Bianchi, 2018; Bianchi, 2009; Bramwell, 2007; Erskine & Meyer, 2012; Meyer, 2009; Scheyvens, 2011; Schilcher, 2007). Additionally, more recently, the need to combine poverty and inequality analyses in tourism research by incorporating the distribution of tourism impacts into studies on tourism and poverty alleviation has also been accentuated since both, poverty and inequality, are strongly interrelated (e.g. Bianchi, 2018; Bwalya-Umar & Mubanga; 2018; Truong, Hall & Garry, 2014).

In this context, this study explores the relationship between tourism, poverty and inequality from a political economy perspective. The importance of applying a political economy perspective, which is concerned with the interrelationship between economics and politics, in tourism research has been emphasised, since tourism is infused by economic relations and power structures (Bianchi, 2018; Bianchi, 2009). In this study, a multidimensional approach to poverty is adopted and researched using sequential triangulation that combines quantitative value chain analysis (VCA) and qualitative photo-elicitation and interviews. To combine poverty and inequality analyses, this study explores the distribution of tourism impacts among different socio-economic groups - and particularly, investigates the influence of power relations. Fieldwork is conducted in Imbassaí - a coastal tourist destination in the municipality of Mata de São João in the state of Bahia in Brazil's Northeast.

The chapter continues by presenting and explaining the study's aim and objectives. This is followed by introducing the background of the study in terms of its theoretical foundation, the research location and the applied methodology. Thereupon, the structure of the thesis is outlined and a brief conclusion is given.

1.2. Study aim and objectives

Aim

This doctoral study aims to explore the relationship between tourism, poverty and inequality from a political economy perspective.

Objectives

To achieve the aim, the study has four interconnected objectives:

(1) To measure tourism-related revenue flows and income and to determine different socio-economic groups at a local level using quantitative value chain analysis (VCA)

To explore the relationship between tourism, poverty and inequality, the study firstly measures the monetary impact (i.e. revenue) of tourism overall and across different sectors of the tourism value chain and identifies different socio-economic groups based on the monetary impact in the study location.

This categorisation of different socio-economic groups forms the basis of this study's investigation of multidimensionality of poverty and inequality.

Applying qualitative photo-elicitation and interviews, the research intends to:

(2) Analyse the value of tourism-related income through consumption and explore the distribution among different socio-economic groups

To broaden understanding of how tourism influences multidimensional poverty and inequality, the study analyses patterns of consumption of individuals from different socio-economic groups and examines distributional issues among these different groups.

(3) Examine opportunities resulting from tourism for different socio-economic groups and explore their value and distribution

To further broaden understanding of how tourism influences multidimensional poverty and inequality, the study examines further (non-income related) opportunities resulting from tourism for different socio-economic groups.

(4) Investigate power relations among actors within and between different spatial scales

To explore the relationship between tourism, poverty and inequality from a political economy perspective, the study investigates power relations among actors within the study location and between actors at the study location and related locations at regional and state level in order to examine how they influence poverty and inequality.

1.3. Study background

Theoretical background

This study adopts Sen's capability approach to conceptualise poverty and inequality. Although the capability approach has emerged a key theoretical framework about development, it has been less frequently applied in tourism research (Croes, 2012; Dorjsuren, 2014). From a capability perspective, poverty is considered as the deprivation of basic capabilities to function (Sen, 1995a). Capabilities are understood as the valuable (or: real) opportunities a person can choose from in order to achieve a minimum level of well-being (ibid). This study explores these valuable opportunities and evaluates how tourism contributes (and might not contribute) to achieving these from the perspectives of different socio-economic groups.

This doctoral study aims to explore the relationship between tourism, poverty and inequality from a political economy perspective. Political economy is concerned with *"the distribution of power and wealth between different groups and individuals, and the processes that create, sustain and transform these relationships over time"* (Collinson, 2003:10). The political economy context of this study is analysed by using Frank's dependency theory and Giddens' structuration theory. Dependency theory contends that dependency relationships exist at different spatial scales due to an unequal distribution of power (Frank, 1969). As a consequence, advanced 'core' societies can dictate development in 'peripheral' societies that lack power in terms of knowledge and capital (ibid). This study utilises Frank's dependency theory to investigate power relations within and between different spatial scales. Instead of following Frank's structuralist perspective on power, this study takes a more agency-centred approach using Giddens' structuration theory.

Structuration theory proposes that agency and structure are in a social relationship, which evolves 'over time and space' since repetitive actions of agency reproduce structure, which, in turn influences agency in a way that it enables or restricts their activities (Giddens, 1979). Accordingly, Giddens (1979:91) views power as 'agents' transformative capacity' and 'structural domination' occurring in social interactions. By conceptualising power using Giddens' view, this study seeks to compensate for the limitations of the structuralist perspective that ignores people's agency in order to advance knowledge on power as interplay between agency and structure. Whilst Giddens acknowledges the importance of space, structuration theory fails to incorporate spatial-inequalities and centre-periphery relations (Dell'Orto, 2002; Varien & Potter, 2008; Soja, 1989). Thus, by applying Frank's dependency theory that considers power relations at different spatial scales, this study seeks to overcome the limitation of structuration theory.

Study location

This study location for this research about the relationship between tourism, poverty and inequality is Imbassaí - a coastal destination in the municipality of Mata de São João in the state of Bahia in Brazil's Northeast. Since the 1990s, tourism was used as a strategy to draw the Northeastern regions out of economic backwardness, alleviate poverty and reduce the gap between the richer South and the poorer North (Siegel & Alwang, 2005). An extensive investment program was carried out focusing on developing mass tourism along the coastline in the Northeast and on generating wider economic, social and environmental benefits (e.g. transport, sanitation, education and conservation) (ibid). This has resulted in tourism being an important source of income for coastal communities in the Northeast, particularly in the municipality of Mata de São João (Pegas, Weaver & Castley, 2015). However, despite large-scale tourism-related investment and development, poverty and inequality continue to persist - particularly, among non-white Brazilians living in the Northeastern regions (IPCIG, 2016; Marteleto, 2012; Pereira, 2016; UNDP, 2014; World Bank, 2003). Neri and Soares (2012:868) point out that

> *"The Brazilian case, especially in the country's northeast, is a good example when thinking about sustainability and poverty relief. It has an enormous potential for tourism, albeit little explored, combined with high inequality and poverty if compared to the rest of the country".*

Thus, studying the relationship between tourism, poverty and inequality in Brazil's Northeast can bring new insights and add to knowledge in that context. Pegas et al. (2015:763) argue that to date there is a *"lack of literature, in any language, on broader analyses of coastal tourism sustainability in Brazil".*

Methodological background

This study explores the relationship between tourism, poverty and inequality from a critical stance. By employing a mixed-methodological approach/ triangulation, that combines quantitative value chain analysis (VCA) and qualitative photo-elicitation and interviews in a sequential order, it seeks to move beyond 'pure' income analysis enabling understanding and wider discussion of poverty and inequality (e.g. Lister, 2004; McGee & Brook, 2001; Truong et al., 2014). Initiated by the Overseas Development Institute (ODI) and the Netherlands Development Organisation SNV, VCA has been applied since 2005 to map the local tourism industry and its actors, track revenue flows and income, and identify nodes of intervention along the value chain to increase the impact of tourism for defined target groups (Mitchell & Ashley, 2009, 2010; Mitchell, Font & Li, 2015). It is a greatly appreciated tool among practitioners since a standard VCA framework and associated guidelines make its application relatively easy, and time- and cost-efficient (Ashley, Mitchell & Spenceley, 2009). Despite appreciation of the VCA framework in the practitioner world, it has been rarely applied in academic research since it rather serves as a quantitative tool than providing in-depth insights into the broader value of tourism. To overcome this limitation, the methods of photo-elicitation and interviews are employed in this study. Falling under the umbrella of visual methodologies, the method of photo-elicitation intends to discuss participant-generated photos in interviews (Rose, 2016) with the aim of gaining *"not just more but different insights into social phenomena"* (Bolton, Pole & Mizen, 2001:503). To date tourism research does not fully make use of visual methods

(Brickell, 2012; Garrod, 2008); although, they have been increasingly applied across the social sciences (Rose, 2016). Garrod (2008) warns that achieving a reasonable sample size can be challenging in a photo-elicitation project since it requires strong commitment of participants. To avoid the risk of an insufficient sample, the method of standard interviewing is incorporated into the study.

1.4. Contribution of the thesis

This study aims at developing contribution to theory by combining Sen's capability approach, Frank's dependency theory and Giddens' structuration theory to explore the relationship between tourism, poverty and inequality from a political economy perspective. Despite their strong relevance in a tourism development context, each approach/theory has been insufficiently utilised and they have not been applied jointly in tourism research. By applying Sen's capability approach and exploring capabilities, or real opportunities, and how tourism contributes to achieving these from the perspective of different socio-economic groups, this study intends to broaden understanding of multidimensional poverty, and combine poverty and inequality analyses in a tourism research context. Acknowledging that tourism is permeated by economic relations and power structures (Bianchi, 2018; Bianchi, 2009), and that these place constraints on people's agency and real opportunities (e.g. Robeyns, 2003), this study analyses the political economy context using Frank's dependency theory. In applying Frank's dependency theory, it particularly seeks to extend knowledge and understanding of dependency relationships in tourism within and between spatial scales, and how they influence poverty and inequality. Instead of using Frank's structuralist understanding of power, this study draws on wider social science literature on agency-structure relations using Giddens' structuration theory to advance knowledge on power as interplay between agents' transformative capacity and structural domination.

1.5. Thesis structure

This thesis consists of nine chapters. Following this chapter, Chapter 2 provides a critical review of the relevant literature related to the study's themes of political economy, poverty and inequality, and power. For each theme, key concepts are discussed, their application in tourism research is assessed and research gaps are identified. The chapter closes with a conclusion that particularly points out the identified research gaps.

Chapter 3 sets out the identified research gaps in context of this study by providing a brief review and explaining how they are addressed in this study to deliver the study's contribution to knowledge. This is followed by presenting and describing the study's conceptual framework, and explaining the conceptual framework in relation to how the main theories are applied, whilst making reference to the study's objectives.

Chapter 4 focuses on the research location. It starts by describing the wider political economy context in Brazil and providing insights into tourism, poverty and inequality to provide justification for the chosen study location in Brazil's Northeast. This is followed by presenting characteristics of the specific study location. Thereupon, the chapter discusses tourism research focusing on poverty and inequality and power in (the Northeast of) Brazil to identify the current state of knowledge.

Chapter 5 delivers insights into the study's philosophical position, provides justifications for the chosen methodological approach and methods, and outlines the process of data collection and analysis. The chapter also includes critical reflections on the study's methodology.

Chapter 6 and 7 present the results of the study. Chapter 6 points out the monetary impact of tourism - particularly, on income for different socio-economic groups. Chapter 7 illustrates perspectives of these different socio-economic groups on tourism development, poverty and inequality, and power relations.

Chapter 8 discusses the results of the study in relation to the relevant literature by focusing on, firstly, poverty and inequality in a tourism context, and secondly, power relations in tourism within and between different spatial scales.

The final chapter, Chapter 9, provides a conclusion by reviewing the study's aim and objectives in context of the key results and the relevant literature, emphasising how this study contributes to knowledge, drawing attention to the study's limitations and making recommendations for future research.

1.6. Conclusion

This introductory chapter started by setting the context of this research emphasising the importance of conducting research into tourism, poverty and inequality using broader perspectives and theoretical frameworks to understand their interrelationship. Thereupon, insights into the study background were given by drawing attention to its theoretical foundation encompassing Sen's capability approach, Frank's dependency theory and Giddens' structuration theory, the study location in the Northeast of Brazil and the mixed-methodological approach that combines quantitative value chain analysis (VCA) and qualitative photo-elicitation and interviews in a sequential order. This was followed by presenting the structure of the thesis and providing a brief description for each of the nine chapters.

The next chapter provides a critical review of the literature related to the study's themes of political economy, poverty and inequality, and power enabling identification of research gaps.

2. Literature review

"We think sometimes that poverty is only being hungry, naked and homeless. The poverty of being unwanted, unloved and uncared for is the greatest poverty."
(Mother Teresa in: Kolodiejchuk, 2007)

2.1. Introduction

Poverty means *"many different things"* (Spicker, 2007:7) and inequality means *"different things to different people"* (Litchfield, 1999:1). Depending on the viewpoint taken on poverty and inequality, the approach to analysis and measurement is influenced (Lister, 2004). Despite the difficulty in defining and analysing poverty and inequality, there seems to be agreement that both are interrelated (Lister, 2004; McKay, 2002; Shildrick & Rucell, 2015; Sen, 1995a) and that it is worth fighting both (Naschold, 2002; Walker, Sinfield & Walker, 2011). Since the *"success of strategies to reduce poverty and inequality hinges on shifts in the relationships and exercise of power"* (UNRISD, 2010:232), it is evident that there is an inextricable connection between poverty, inequality and power (Oosterom & Scott-Villiers, 2016). To develop understanding of this connection, a political economy approach is frequently utilised (Collinson, 2003). In particular, in tourism research, the importance of applying political economy perspectives has been emphasised since tourism cannot be evaluated detached from its political and economic context, in which economic relations and power structures permeate everyday life (Bianchi, 2018; Bianchi, 2009).

This chapter provides a critical review of the relevant literature on political economy, poverty and inequality, and power - enabling identification of theoretical and methodological gaps in the literature and developing the rationale for this doctoral research. It consists of three main parts:

- Firstly, to provide the context of this study, the concept of political economy and its key perspectives are introduced. Since tourism research has foremost adopted a radical political economy perspective based on dependency theory, a discussion of dependency theory is provided. Thereupon, the application of dependency theory in tourism research is assessed.

- Secondly, the concepts of poverty and inequality are discussed through a review of absolute and relative definitions, and a combination of both. This is followed by an examination of Sen's capability approach, which is the underlying approach for combining absolute and relative definitions.

Thereupon, approaches to researching poverty and inequality are outlined, before both concepts, poverty and inequality, are reviewed in a tourism-research context.

- Thirdly, light is shed on the concept of power through a review of theories of power, particularly focusing on Giddens' structuration theory. This is followed by presenting tools to research power. Thereupon, a review of how power is understood and analysed in tourism research, and particularly in political economy studies in tourism that are relevant to this research is provided.

Finally, a conclusion of the chapter is provided and identified research gaps related to the study's themes of political economy, poverty and inequality and power are pointed out.

2.2. Political economy in tourism

The first theme discussed in this chapter is political economy. After providing an overview, closer attention is drawn to dependency theory, in general, and more specifically, in the context of tourism research.

2.2.1. Political economy - an overview

Alongside difficulties in defining and researching poverty and inequality, the concept of political economy has also *"many different meanings"* (Weingast & Wittman, 2008:5). In social science, political economy has been predominantly viewed as an area to study the interrelationship between economics and politics (Hooks & Crookston, 2018). Collinson (2003:10) suggests that political economy is concerned *"with the interaction of political and economic processes in a society: the distribution of power and wealth between different groups and individuals, and the processes that create, sustain and transform these relationships over time"*.

According to Clark (1998), four main, albeit contrasting, perspectives have become prominent in modern political economy, which are Classical Liberalism, Radicalism, Conservatism and Modern Liberalism/ Neoliberalism. These perspectives can be distinguished by their basic assumptions (see: Table 2-a). The four political economy perspectives have been used to evaluate issues related to broad themes such as government and market, industry and labour, culture and education, international trade and development, and environment (Clark, 1998). Due to tourism studies being interdisciplinary, scholars seem to have considered tourism under each of these themes; nonetheless, considerations from the field of international trade and development appear to be dominant (Mosedale, 2011). Clark (1998) points out that conservatives have almost been silent on the debate around international trade and development - which is confirmed by Borgotta and Montgomery (2001) in stating that the expansion of capitalism across nations, societies and markets has led to two main conflicting viewpoints: (classical and neo-) liberal and radical. While from a (classical and neo-) liberal perspective, free trade and competition are pushed as the predominant development policies, scholars taking a radical point of view use dependency theory to argue that protectionism is the main option for achieving development (Clark, 1998).

	Classical Liberalism	Radicalism	Conservatism	Modern Liberalism/ Neoliberalism
Human Nature	Self-interested individuals with full capacity for reason satisfy their needs and desires effectively	Individuals with certain needs and capacity for reason; need social context to realize their potential	Individuals with limited capacity for reason (some have greater rational power than others); need social relations for development	Individuals with the capacity of rational choice; can only develop through social relations
Society	An aggregation of individuals and has no goals or purposes of its own	More than just a collection of individuals	Based on a natural hierarchical order	An aggregation of individuals with both private and collective interests
Government Purpose	To protect rights of individuals	To represent collective interests	To maintain natural hierarchical order	To protect rights of the individual and to pursue goals collectively
Legitimate Authority	arises through consent of individuals	exists when democratically established, based on participation	resides with persons in society leadership roles	exists when power is exercised in the public interest

Table 2-a: Political economy perspectives
Source: Author, based on Clark (1998)

Tourism research focused on political economy[1] has foremost adopted a radical viewpoint based on dependency theory to examine the relationship between the large-scale tourism industry in the North and tourist destinations in the South (Chaperon, 2014; Mosedale, 2011). Before exploring the 'dependency debate' in a tourism context, a discussion of dependency theory is provided.

[1] It needs to be acknowledged that there are relatively few studies in tourism research use a political economy approach.

2.2.2. Frank's dependency theory

Background

As stated in the previous section, Borgotta and Montgomery (2011) distinguish two main viewpoints on capitalism. From a (neo-) liberal viewpoint, the capitalistic expansion is viewed as a process of (economic) development for undeveloped countries (Armer & Katsillis, 2001). Developed countries have already gone through this process and are believed to support developing countries moving along the 'development path' (ibid). Accordingly, developing countries become modern and more developed through the interaction with the developed world in terms of capital, institutions and values – on the contrary, it is argued that developing countries that do not interact do not advance development (Kapoor, 2002). Since the 'promised' development did not occur in every country and it appeared that, in fact, the gap between rich and poor countries increased, the radical perspective utilising dependency theory emerged out of Latin America in the mid-1960s and early 1970s (Dunn-Chase & Grimes, 1995).

Central ideas: core and periphery

Dependency theory[2] takes a radical view in arguing that the expansion of capitalism has caused underdevelopment since the capitalist world does not support, but instead exploits less-developed countries (Hanson, 1998). Capitalism seeks out low cost labour, trade and limited regulations resulting in a *"global race to the bottom"* among developing countries in order to attract investment in national industries from developed countries which, in turn, try to increase competitiveness and surplus (Jaakson, 2004:171). Using the example of Latin America, dependency theory highlights the interdependence between development and underdevelopment in which the advanced societies in the core dictate development in the periphery, or more precisely, develop the underdevelopment (Frank, 1969). Thus, rather than viewing the lack of development as a stage in which developing countries have not yet interacted with the *"outside capitalist world"* since they rely on their own systems and structures, dependency theory considers underdevelopment as largely due to the unequal relations between the undeveloped with the developed world (Frank, 1969:5). Frank (1969:4) emphasises this by arguing that *"the now developed countries were never underdeveloped"*.

[2] Dependency theory can be traced back to Marx' conflict perspective, which is largely associated with structural macro-analysis (Collins, 1994). Until the 1990s macro-analysis has focussed on the national level; however, as a result of globalisation processes macro-analysis has sought to incorporate global and transnational dimensions (Berger & Weiss, 2008).

Focussing on the unequal relations, dependency theory contends that capitalism favours the core since the core has the power over economic and political resources (capital, investment and influence) (Frank, 1969). These resources can be utilised to manipulate development in a way that is beneficial for the capitalist core and leaves the periphery behind (Frank, 1969). The economic surplus is further used to enhance development and strengthen the status of the core while the periphery struggles (Mosedale, 2011). According to Frank (1969), the development of the periphery is not possible at all. Since the *"most underdeveloped and feudal-seeming today are the ones which had the closest ties to the metropolis in the past"* (Frank, 1969:13), he suggests that developing countries should loosen their ties with the core. On the other hand, (neo-) liberalists argue that developing countries should open their markets and attract foreign investment (Clarke, 1998).

Critical perspectives on dependency theory

In the 1980s, dependency theory became largely discredited since foreign exchange and investment showed its effect in increasing growth rates in developing countries and (neo-) liberalism remained the prevailing paradigm of development (Hunt, 1989 as cited in: Lacher & Nepal, 2010). Dependency theory has been criticised for failing *"in both as a theoretical explanation and also as a practical plan of action"*, in that it did not provide suggestions for alternative development pathways (Herath, 2008:827). Kay (1993:692), however, notes that the *"resurgence of neoliberalism does not mean that development theory in general, and the Latin American development school in particular, got it all wrong. By no means"*. He (1993) points out that neoliberalism did not solve the problems of development, instead poverty, inequality and conflict still persist; thus, he (1993) believes that dependency theory might be better in understanding these problems and developing solutions. This has been confirmed by Kapoor (2002) and Herath (2008), in arguing that despite its loss in prominence, dependency theory still remains relevant. Examining processes of globalisation, Herath (2008:832) presents *"thorough empirical evidence that dependency is still very much haunting the developing countries"*. Thus, it is suggested to use innovative approaches to deal effectively with the problems of development (ibid). In that respect, Herath (2008:833) contemplates that since global institutions in the North did not provide effective support for development to countries in the South, it might be time for developing countries to have

> *"more freedom of choice and freedom from structural barriers and global inequalities. If structural barriers are removed and inequalities addressed, developing countries can expect to have a chance to loosen their dependence on external aid; then the emphasis on aid will be replaced by an emphasis on North–South collaboration".*

Further criticism relates to the focus of dependency theory on structural inequalities between the core in the North and the peripheral South, whilst not putting much emphasis on development gaps at different, particularly, smaller spatial scales (Herath, 2008). Although dependency theory has largely been concerned with analysing international relations in the political economy, it is worthwhile noting that it can also be applied to evaluate unequal relations at smaller spatial scales as Frank (1969:7) argues that the

> *"exploitative relationship (…) extends the capitalist link between the capitalist world, national metropolises to the regional center (part of whose surplus they appropriate) and from these to local centres, and so on to large landowners and merchants who expropriate surplus from small peasants"*.

In applying Frank's (1960) dependency theory between different (smaller) spatial scales, this study seeks to evaluate its value and relevance in such context. Chapter 3. Conceptual thinking provides a discussion of how dependency theory has been conceptualised in this study.

2.2.3. Application of political economy approaches (dependency theory) in tourism research

From the 1950s to the 1970s, tourism was encouraged as a means for development under the neoliberal paradigm (Sharpley & Telfer, 2015). Generating foreign exchange, creating employment, income and wider social benefits, tourism was considered as *"a catalyst for modernization, economic development and prosperity in emerging nations in the third world"* (Williams, 1998:1). However, at the end of the 1970s, it became apparent that tourism was not a panacea for development in developing countries since multiplier effects were considerably less than expected (Britton, 1982; Brohman, 1996; Mosedale, 2011; Oppermann & Chon, 1997; Scheyvens, 2007, 2011). Being sceptic of tourism as a development strategy and its potential to generate foreign exchange, create employment opportunities and stimulate the wider economy, these studies employ Frank's (1969) dependency theory to highlight the unequal relationship between the core northern-based tourism industry and the peripheral tourism destinations in the South.

Dependency theorists have argued that the success in bringing economic development to less developed countries is limited due to existing structural inequalities in the tourism industry which result in high levels of integration, foreign control and ownership (Britton, 1982; Brohman, 1996). Jaenis (2014:188), for example, argues that *"the dominance of foreigners or the white population in the tourism sector […] is in fact* *common throughout Southern Africa"*. This is confirmed by Akama's and Kieti 's (2007) study on Kenya and Lapeyre's (2011) research on Namibia which both highlight that the provision of tourism services is controlled and managed by foreigners. Similarly, Mbaiwa (2017) identifies that the Okavango Delta (in Botswana) is largely owned and controlled by outsiders (e.g. international companies). Since local communities or individuals in the periphery often have neither capital nor expertise to run their own business, they are forced to accept foreign dependency and control in order to generate employment and income. Thus, tourism has frequently been described as a new form of colonialism (Britton, 1982; Fisher, 2004; Mbaiwa, 2017; Mowforth & Munt, 2016).

Large vertically and horizontally integrated Northern-based tour operators[3], that have emerged to increase competitive advantage, have power to dictate tourism development in the peripheral destination since they have capital, expertise (particularly, in marketing the tourism product), connection to potential tourists and control over tourism flows (Britton, 1982). Meyer (2003:9) emphasises that *"tour-operators are the crucial link in the distribution chain, representing the central connection between customers and providers of services and therefore having the power to influence both sides, the demand and the supply, according to their interests"*. Similarly, Lapeyre (2011:199) argues that tourism lies in the hands of large tour operators (and wholesalers) that dominate the global tourism chain and control development in peripheral regions and concludes that tourism is a *"very risky development option"* which should only be promoted with caution.

This dominance of the Northern-based tourism industry is associated with high level of leakages of foreign exchange earnings and socio-economic inequality in the periphery (Britton, 1982; Brohman, 1996; Knight et al., 2017). Peripheral tourist destinations are dependent on Northern-based intermediaries to provide investment and expertise for tourism development and to direct tourist flows. Further, tourists require certain standards and products that might not be available in the destination at all or only with low quality so that these need to be imported (Meyer, 2007). Thus, tourist spending often never reaches or leaks out of the destination which reduces the economic impact of tourism development in the periphery (Lacher & Nepal, 2010).

[3] Vertical integration occurs, when an organisation owns a company or companies at different levels in the value chain e.g. a tour operator buys a travel agency; horizontal integration occurs at the same level of the value chain e.g. tour operator buys another tour operator (Cooper, 2016).

In terms of leakage, Mbaiwa (2017:101) argues that *"research has established that, in general, over 70% of the tourism revenue from developing countries leaks out to developed countries"* which was found to be the case in Botswana due to the dominance of foreign-owned businesses. Diaz-Benevides (2001 as cited in: Meyer, 2007) claim that leakages in most developing countries range between 40-50% and are thus considerably higher than in advanced and diversified developing countries (10-20%). Furthermore, leakages are considered to be exceptionally high when vertically integrated tour-operators are involved or when products required by the tourism industry cannot be provided in terms of quantity and quality by the local economy (ibid). However, analysing the issue of leakages, it was found that estimations of the size of leakages differ greatly (Meyer, 2003, 2007) and that leakages in tourism are not necessarily higher than in other industries (Roe, Ashley, Page & Meyer, 2004).

Meyer (2011:159) argues that *“it seems that most critics of tourism development in economically less developed nations accepts the seemingly causal link between high levels of foreign ownership and the leakage of economic surplus back to the metropolitan core”*. Instead of ownership, the type of tourists a destination serves and the tourism product offered seem to have an impact on the level of sourcing from the local economy and consequently on the level of leakages (ibid). This is supported by Chaperon and Bramwell (2013:134) in arguing that dependency theory's

> *"unsophisticated application can promote assumptions that in peripheral developing countries a single pattern of tourism development is dominant, which is large-scale, based on externally owned accommodation, and that attracts international tourists. These assumptions, however, can neglect how in these countries there can be small-scale tourism, much locally-owned accommodation, and much domestic tourism".*

Furthermore, from a dependency perspective, tourism is considered as an enclave industry in spatial, economic and social terms (Britton, 1982; Mbaiwa, 2017; Mbaiwa, 2005). On package holidays, tourists are often transported from an international airport to resort and hotel enclaves that are located in most favourable coastal regions and in distance to the local host community (Britton, 1982). Since tourists only leave the enclaves for brief 'artificial' excursions for entertainment, shopping, sight-seeing and departure, limited interaction between the Western tourists and host communities takes place, and if so, it is often influenced by stereotypes. Weaver (1988:323) describes this as a *"juxtaposition of an elite resort-based coast with an impoverished labor-supplying interior, thereby attesting to the tendency of tourism to perpetuate the structural and spatial inequalities (i.e. underdevelopment)"*.

Working conditions in these large-scale, foreign owned enclaves are frequently described by its *"exploitative nature"* (Bianchi, 2011:26). Since locals lack expertise and skills required for working in management or senior positions, these positions are filled with expatriates, whilst locals are lefts with inferior, unskilled and low-paid jobs (Daldeniz & Hampton, 2013; Lee, Hampton & Jeyacheya, 2015; Mbaiwa, 2017; Mihalic, 2015; Mutimucuio & Meyer, 2011). A recent study by Hampton, Jeyacheya and Long (2018) focusing on supply chain, ownership and employment in Ha Long Bay (Vietnam) confirms that limited human resources in terms of vocational training, professional experience and soft skills is the main barrier to employing local people. Furthermore, lack of training and partly lack of work ethics are identified as reasons that limit local employment (in a Malaysian case study) (Daldeniz & Hampton, 2013). Liu and Wall (2006) point out that, limitations in human capital in developing countries has been major obstacle for locals to engage in tourism employment and generate income. They (Liu & Wall, 2006:169) further argue that low interests in developing human resources underpin the *"prevalent view of hosts as victims in tourism's North-South encounters"* and *"perpetuate and aggravate a culture of subservience".*

Some studies (e.g. Hampton et al., 2018; Meyer, 2007; Scheyvens & Russel, 2012) have shown that, particularly, large-scale tourism businesses employ strategies for professional development and training. In the case of in Fiji, Scheyvens and Russel (2012) pointed out that large-scale, foreign owned businesses are more likely to offer more adequate salaries for employees, to respect laws and regulations of working conditions and to make substantial investment in capacity-building and training in comparison to small-scale, locally owned businesses. Nonetheless, if there is dependency on tourism i.e. there are limited options to find work in other industries, combined with a high level of external risks e.g. disasters, terrorism, and an increasing competition for jobs, particularly, through migration, working in the tourism industry is equipped with insecurity (Lee et al., 2015). In case of Seychelles, Lee et al. (2015:195) conclude that the condition of labour *"is one of precarity"* characterised by *"exploitation, uncertainty, and contingency"*.

Dependency studies come to conclusion that tourism creates winners and losers whereas losers are the local host community in the periphery and winners are elitist, powerful actors that are external to the host community (often) from the core (e.g. Britton, 1982; Brohman, 1996). Analysis of dependency relationships between winner and loser tend to focus on macro-structures, whilst, regional and local variations have been widely overlooked in tourism research (Bianchi, 2015; Mosedale, 2011). Only a few tourism studies analyse dependency relationships at smaller spatial scales (i.e. national, regional and local) (e.g. Chaperon & Bramwell, 2013; Lacher & Nepal, 2010). Chaperon and Bramwell (2013:134) further point out that *"it is important that explanations of peripheral tourism development at any geographical scale are not* *deterministic"*. In fact, their study (Chaperon & Bramwell, 2013:149) on dependency relationships in Maltese islands shows that

> *"while Gozo [= the smaller one] exhibited much dependency on the main island for its patterns and pace of tourism development, the Gozitan actors still exerted influence over their tourism industry. Actors on this peripheral island possessed ‘‘agency’’ and, despite working within substantial structural constraints, they exerted a degree of control over their tourism industry".*

The study's (Chaperon & Bramwell, 2013) analysis is based on economic and political core-periphery relations and identifies that Gozo's economic dependence on Malta being largely due to its geographic and structural constraints, in that Gozo is smaller, can only be accessed via Malta and has less economic strength. At the same time, its geographic remoteness and size can be considered an advantage to attract a particular type of tourist. Additionally, many of the tourism businesses are owned by locals so that revenue is retained in Gozo, *"a situation that challenges assumptions that peripheral areas inevitably are reliant on external tourism investment"* (Chaperon & Bramwell, 2013:141). Thus, despite the economic dependency on Malta, Gozo has economic agency to develop the island's tourism industry (ibid). Politically, the Gozitian tourism industry is strongly affected by external decisions since political power is highly concentrated on Malta (ibid). It is argued that due to its peripheral location, it is difficult for Gozitians to set up networks with Maltese politicians and to positively influence tourism policy and planning, which limits their political agency (ibid). As a consequence, the study's respondents perceive that Gozo is not promoted effectively as a tourist destination and that resources are not allocated fairly by the national authority. Despite its political dependence on Malta, the Gozo Ministry is perceived to have some extent of influence and Gozitians seek to actively make their voice heard. The study's (Chaperon & Bramwell, 2013:151) findings suggest that

> *"fuller recognition is needed of the complex tensions inherent in core-periphery tourism development and the often contested power relations of dependency. These processes will not be understood through overly simplistic applications of dependency ideas. Such research could usefully draw far more from the wider social science literature on agency-structure relations".*

Lacher and Nepal (2010) apply dependency theory to examine the relationship between four rural villages (periphery) and a gateway city Northern Thailand’s tourism industry. Tourism businesses within each village are commonly confronted with a lack of capital to further invest into and expand their businesses, which influences the overall attractiveness of a village (ibid). The attractiveness influences the tourism gateway city in directing tourists to a particular village - thus, the gateway city has *"substantial influence on their [= the villages] development, and can largely dictate how the village will develop as a destination through their interest, or lack thereof"* (Lacher & Nepal, 2010:963). Due to the largely uneven development between the gateway city and peripheral villages, the gateway city gains much more from tourism than the villages, although the villages are able to capture some revenue (ibid).

Lacher and Nepal (2010:964) assign *"some credibility to dependency theory"*, in that they identify the classic pattern of the periphery working to the advantage of the local core, which extends to the regional core, further to the capital core and the international core. However, while *"orthodox dependency theory views the periphery as a hopeless victim of the core"* this is not the case in their study since the peripheral villages gain some benefits (Lacher & Nepal, 2010:964). They (ibid) emphasise that it is crucial to integrate internal issues in terms of structure, governance and conflicts in the analysis since they impact on tourism development, and thus, they conclude that dependency theory needs combining with other theories in order to evaluate internal conditions (e.g. internal power relations and conflicts among tourism stakeholders) alongside dependency relationships in the tourism industry. This study combines dependency theory with analysis of power relations, which is explained in more detail in Section 2.4.4. Power in tourism research.

2.3. Tourism, poverty and inequality

The second theme discussed in this chapter is poverty and inequality. After providing general definitions of these concepts, closer consideration is given to Sen's capability approach. Thereupon, approaches to researching poverty and inequality are outlined, before both concepts, poverty and inequality, are reviewed in a tourism-research context.

2.3.1. Understanding and defining poverty and inequality

Since there are various concepts of poverty and inequality, understanding and defining them has caused long-standing debate and discussion (Shildrick & Rucell, 2015). This section discusses absolute and relative definitions - which are central to developing understanding of the concepts.

Absolute poverty, relative poverty and inequality

Absolute and relative perspectives of poverty have been central in post-war debates and discussions on how to define poverty (Lister, 2004). Spicker (2007:11) points out that the idea that poverty means the *"same thing"* is known as absolute poverty and the idea that it means *"different things"* is referred to relative poverty. In the UN

Report of the World Summit for Social Development (1995:38) absolute poverty is defined as *"a condition characterized by severe deprivation of basic human needs, including food, safe drinking water, sanitation facilities, health, shelter, education and information".* Thus, it becomes clear, that absolute poverty does not only relate to lack of income, but to lack of access to social services - which can frequently be found in developing countries (UN, 1995).

Understanding poverty in its societal context is referred to as relative poverty - which has been advocated by Townsend (1979:31) in arguing that

> *"Individuals, families and groups in the population can be said to be in poverty when they lack the resources to obtain the types of diet, participate in the activities and have the living conditions and amenities which are customary, or are at least widely encouraged or approved, in the societies to which they belong. Their resources are so seriously below those commanded by the average individual or family that they are, in effect, excluded from ordinary living patterns and activities".*

Using Townsend's (1979) definition, it becomes clear that from a relative perspective, poverty is defined by social norms and therefore, what poverty actually is, differs depending on the societal context. As such, it is considered that poverty not only occurs in developing countries, but also in the developed world. According to Lister (2004:3), *"What it means to be poor can be very different in different societies. […] Socio-economic structural and cultural contexts shape the experiences and understanding of poverty"*.

Moreover, relative poverty reflects inequality in a society (Spicker, 2007). People are not just poor, but poverty is shaped by conditions in the society, in which resources are unequally distributed. For example, if it is common in a society that a child of a certain age has a mobile-phone, a child, who cannot afford a mobile-phone, is relatively poor as he/ she lacks the resources to participate in the socially-defined living circumstances. In this sense, poverty is comparative or as Spicker (2007:15) argues *"it has to be understood by comparing the position of people who are poor to those who are not poor"*. Lister (2004) points out that relative poverty and inequality are not identical, although often been understood interchangeably. She (2004:23) clarifies that *"inequality is concerned solely with the comparison between groups. Relative poverty adds to the comparison the notion of incapacity to meet certain needs, broadly defined to include participation in society".*

Despite discussions on relative poverty and inequality, there is agreement that poverty and inequality are strongly interrelated, in that reducing structural inequalities is crucial for tackling poverty effectively (Atkinson, 1999; Hick, 2012; McKay, 2002; Sen, 1995a). Structural inequalities exist in power imbalances in the society, which result in the poor being *"excluded from public life"* whilst the rich *"are able to exclude the public from their special advantages"* (Scott, 1994:151).

Reconciling absolute and relative poverty

To bridge poverty analysis in the developing and developed world, attempts have been made to reconcile definitions of absolute and relative poverty. The UN (1995) adopted the definition of overall poverty. Overall poverty is expressed by the diverse forms it can take including

> *"lack of income and productive resources sufficient to ensure sustainable livelihoods; hunger and malnutrition; ill health; limited or lack of access to education and other basic services; increased morbidity and mortality from illness; homelessness and inadequate housing; unsafe environments; and social discrimination and exclusion. It is also characterized by a lack of participation in decision-making and in civil, social and cultural life"* (UN, 1995:38).

Accordingly, the definition of overall poverty is comprehensive, in that it addresses material conditions/needs (e.g. food, housing), economic circumstances (e.g. resources to obtain livelihood) and social conditions (e.g. participation in social life) - which are the three dimensions to develop understanding of poverty according to Spicker (2007). The UN emphasises that inequality, that stems from factors and conditions beyond individual responsibilities poses a threat to development, because it limits individual opportunities (UNDP, 2014). Accordingly, reducing inequality in all dimensions of human development is crucial so that people have equal opportunities to achieve personal well-being. The underlying approach of the UN's definition of overall poverty is Sen's capability approach - which is discussed in the next section.

2.3.2. Sen's capability approach

Background

Pioneered by the economist-philosopher Amartya Sen, the capability approach has become a key theoretical framework about development in recent decades; however, it *"is not a theory that will explain poverty, inequality, or well-being, but rather a theory that helps us to conceptualize these notions"* (Robeyns, 2017:142). From a capability perspective, poverty is considered as the deprivation of basic capabilities to function i.e. deprivation of real opportunities a person can choose from in order to achieve a minimum level of well-being. Sen (1995b:15) puts forward that functionings can

> *"vary from such elementary physical ones as being well nourished, being adequately clothed and sheltered, avoiding preventable morbidity, and so forth, to more complex social achievements such as taking part in the life of the community, being able to appear in public without shame, and so on".*

Sen (1983) argues that poverty is absolute with regard to capabilities since it contains the absolute requirement to escape to poverty, whilst a diverse collection of commodities depending on each context might be needed to escape poverty - thus, taking a relative dimension with regard to commodities. He (Sen, 1983) explains that there is an absolute requirement to avoid shame for any person in a society; however, 'how to do so' depends on the conventions in the society. For example, in rich countries there seems to be the convention that a child needs to have a smart-phone; if a child does not have one, she/he might be ashamed to appear in public. This convention can be different in another social context, for example, in that a child needs to have a simple mobile-phone to appear without shame in public in a less economically developed country. Thus, the commodities necessary to avoid shame differ depending on the social context.

Central ideas: functionings, capabilities and agency

'Functionings' are the beings and doings that constitute a person's well-being (Sen, 1995a). 'Beings' describe the state of human beings, for example, in being well nourished or being undernourished, being educated or being illiterate (Sen, 1999). 'Doings', on the other hand, represent potential activities such as going to school, travelling, having a job (ibid). 'Capabilities' refer to the real freedom/opportunities of each person in achieving a set of functionings (Sen, 1995a). Sen (1995a:40) argues that *"if the achieved functionings constitute a person's well-being, then the capability to achieve functionings will constitute the person's freedom - the real opportunities - to have well-being"*. Accordingly, each person's chosen set of functionings depends on the available opportunities to choose from. The difference between *"achieved functionings and capabilities is between the realized and the effectively possible - in other words between achievements, on the one hand, and freedoms and valuable options from which one can choose, on the other"* (Fukuda-Parr, Lawson-Remer & Randolph, 2013:228).

Since valuable opportunities can vary for different individuals, the capability approach acknowledges the diversity of human beings (Sen, 1995a). The 'differing value of something for each individual' has been emphasised by Green (as cited in Sen, 2002:586) in arguing that *"We do not mean merely freedom from restraint or compulsion… when we speak of freedom as something to be so highly prized, we mean a positive power or capacity of doing or enjoying something worth doing or enjoying"*.

Sen (2002:10) expands that freedom does not only relate to capabilities i.e. real opportunities, in representing the *"ability of a person to achieve those things that she has reason to value"* (as explained above), but also to the *"freedom involved in the process itself"*. Alkire and Deneulin (2009) explain that this personal process of freedom is mirrored in the notion of agency. In defining an agent as *"someone who acts and brings about change"* (Sen, 1999:19), agency refers to the ability to commit and pursue the things that a person has reason to value (Alkire & Deneulin, 2009).

Narrow and broad ways of application

Sen's capability approach can be employed in narrower and broader ways (Crocker & Robeyns, 2009). In a narrower sense, the capability approach is used to evaluate individual functionings, or both functionings and capabilities. Robeyns (2016:4) explains that

> *"In the more narrow way, the capability approach tells us what information we should look at if we are to judge how well someone's life is going or has gone; this kind of information is needed in any account of well-being or human development".*

Thus, the capability approach, leads the way for interpersonal comparisons, in that information on human functionings and capabilities are collected, which can be used for comparing the well-being of two people, groups or societies at the same or different times (Robeyns, 2016). Sen (1995a:4,5) states that *"A person's capability to achieve functionings that he or she has reason to value provides a general approach to the evaluation of social arrangements, and this yields a particular way of viewing the assessment of equality and inequality"*. The narrow perspective has been criticised for insufficiently considering *"power, the social construction and constraints on choice, and the influence of societal structures on people's agency and well-being"* (Robeyns, 2003:48). Thus, in a broader sense, the capability approach adds to the evaluation of individuals' well-being (to the narrow perspective) normative considerations and values such as power relations (Robeyns, 2016). Since power structures permeate every-day life, it is crucial to take these into consideration and develop understanding of how these create barriers to people's livelihoods, which supports the application of Sen's capability approach in a broader sense.

Critical perspectives on the capability approach

Although Sen's capability approach has been highly influential in development studies (Croes, 2012), it has not reached mainstream economic analysis (Atkinson, 1999; Hick, 2012; Townsend, 2006). The main criticism refers to the operationalisation of the capability approach (Chiappero-Martinetti, 2010; Clark, 2009; Lelli, 2010; Sugden, 1993). Firstly, the capability approach is an inherently complex concept, in that it relates to two distinct spaces, the capability and the functioning space, which themselves are multidimensional (Chiappero-Martinetti, 2010). The capability approach acknowledges human diversity (e.g. gender, age, physical and psychological conditions), which means that conversion factors to achieve well-being vary and capability sets that constitute well-being differ (ibid). The capability approach not only requires an analysis of each aspect separately, but also seeks to investigate the linkages between them (ibid). In this context, Chiappero-Martinetti (2010:284) highlight that *"what is worth noting is that with the capability perspective, the plurality goes well beyond the prescription of multivariate spaces for assessing well-being, involving other fundamental aspects and levels of analysis"*. The complexity of the capability approach requires availability or collection of large amount of data (e.g. on multiple capabilities and functionings), which makes its practical application difficult and thus less appealing (Alkire, 2002).

Secondly, the capability approach is a vague concept, which has been acknowledged by Sen (2003:5) himself in arguing that *"there are many ambiguities in the conceptual framework of the capability approach"* which are difficult to depict. In that regard, Sen has also been criticised for failing to provide a list of capabilities and functionings (Hick, 2012) - which, however, misconstrues the central idea of the diversity of capability sets for individual human beings (Clark, 2009). Sen (2003:6) contends that *"in social investigation and measurement, it is undoubtedly more important to be vaguely right than to be precisely wrong"*.

Interestingly, the abovementioned criticisms towards the capability approach are often re-construed as potential strengths by its supporters (Clark, 2009; Chiappero-Martinetti, 2010). Chiappero-Martinetti (2010:269) points out that

> *"Indeed, it is precisely the rich and unrestricted nature of the capability approach that makes it so appealing to many researchers, its usefulness in addressing a plurality of issues within a multiplicity of contexts, its interpretative richness regarding what a good life is, and the attention is focused on human diversity".*

This study applies Sen's capability approach in a broader sense by combining an evaluation of capabilities (i.e. the real opportunities tourism provides to people) and functionings (i.e. achieved beings and doings through tourism opportunities) with an investigation into power relations. Chapter 3. Conceptual thinking provides a discussion on how the capability approach has been conceptualised in this study.

2.3.3. Researching poverty and inequality

Poverty is *"one of the most researched and analysed subjects in social science"* (Spicker, 2007:7). Depending on how poverty is understood and which definition is taken, a different approach to researching poverty is utilised (Lister, 2004). Whilst a quantitative approach seeks to objectify and deliver facts related to poverty through measurement, a qualitative approach is concerned with explaining and developing understanding of poverty (ibid). To date, the former approach is dominant since it enables an analysis of poverty concerning a wider population, produces numerical data that can be used to define policies and monitor impacts of interventions (Lister, 2004; Spicker, 2007). The latter, on the other hand, has received limited attention since it does not provide analysis of poverty at a large-scale and therefore, does not allow for designing wider intervention strategies to alleviate poverty (ibid). Nonetheless, McGee and Brook (2001) point out that a qualitative approach can provide valuable insight into poverty.

Despite the interrelationship of poverty and inequality, analyses have often been conducted separately in research and practice (Naschold, 2002). Nonetheless, tackling inequality between groups or individuals in society is crucial for poverty reduction McKay (2002) - thus, emphasising the need to combine poverty and inequality analyses.

A quantitative approach - measuring poverty and inequality

To measure poverty, different indicators (e.g. income, consumption or wealth) are chosen and assessed against a defined standard. A central indicator used to measure poverty is income - considering a person as poor, when his/her generated income is not sufficient to ensure a minimum standard of living (Fukuda-Parr, 2006; Townsend, 2006). This minimum standard can be described by poverty lines. The World Bank (2017), for example, defined extreme poverty by living on less than US$1.25 per day until it was updated in 2015 to less than US$1.90 per day. The 'Gini coefficient' is a key measure of inequality comparing the 'income-poorest' with the 'income-richest' of certain population (Gallo, 2002). Inequality is expressed on a range from 0 (perfect equality) to 100 (perfect inequality) (Haughton & Khandker, 2009).

Both, poverty and inequality measurement, are faced with the question of the 'right indicator' as Gallo (2002) asserts that depending on the indicator chosen one might come to different conclusions. Atkinson (1983:37) emphasises this by arguing that *"A miserly millionaire who lived on virtually nothing would from one point of view appear rich [income-based indicator], and from the other, poor [consumption-based indicator]"*. Yet, not only choosing the right indicator involves challenges, also the process of measurement is equipped with difficulties (e.g. obtaining data).

The application of poverty lines has been raised long-standing debate among academics and practitioners since these imply that human well-being solely depends on material needs (Townsend, 2006). Thus, they have been criticised for representing only one dimension of a multidimensional concept (Edward, 2006). In order to mirror the multidimensionality of poverty, a set of indicators is compiled to generate a composite measure (Spicker, 2007). The Multidimensional Poverty Index (MPI) represents such a composite measure (UN, 2018a). Initially published in the 2010 UN Report, the MPI builds on Human Development Index (HDI), which is influenced by Sen's capability approach (Atkinson, 1999). According to the UN (2018b:online) the HDI *"was created to emphasize that people and their capabilities should be the ultimate criteria for assessing the development of a country"*. While the HDI analyses development based on three dimensions which are health (measured by life expectancy), education (measured by years of schooling) and standard of living (measured by gross national income per capita) (UN, 2018b), the MPI analyses deprivations across these dimensions and identifies the amount of people who suffer deprivations in one third or more of the indicators as multidimensional poor (UN, 2018a).

Despite the popularity of composite measures, these have been criticised for simplifying the complexity of the problem, in that these only produce a numerical indicator that is insufficient for capturing the full picture of poverty (Ranis, Stewart & Samman, 2006; Spicker, 2007). Alkire and Santos (2009:124) summarise that *"quantitative poverty and inequality measurement is - although important - limited"*. Narayan (1999:15) adds that quantitative measures provide crucial information at aggregate-level; however, these are able *"to tell only a partial story"*, which might lead to an ineffective design and implementation of policies to fight poverty.

A qualitative approach - explaining and understanding poverty and inequality

In an attempt to overcome the inadequacy of measurement in representing the full picture of poverty, qualitative, often participatory, approaches have been adopted, in that researchers talk to people who are poor in order to explore their views on poverty and inequality (Lister, 2004). It needs to be noted that qualitative (participatory) approaches tend to build on quantitative measurement (e.g. poverty lines), in that quantitative measurement is used to identify the income-poor (Narayan, 1999). Robb (2002:104) argues that participatory approaches help *"engaging with the poor [which] leads to better technical diagnosis of problems and better design and implementation of solutions"*. Thus, instead of investing time and effort in finding exact measurement, Robb (2002) proposes to enhance understanding from the perspective of people living in poverty in order to develop and implement policies that really matter to people. In this sense, participatory research is committed to empowering poor people (Lister, 2004).

'Voices of the poor' is a study by the World Bank that seeks to present the views of poor people (Narayan, 1999). Using a Participatory Poverty Assessment (PPA)[4] that involves quantitative data (e.g. poverty lines, social and demographic characteristics, economic profiles) and qualitative interviewing, poor people in twenty-three countries were interviewed, the statements were collected and analysed in order to identify relevant themes (ibid). The findings were utilised to inform the World Bank's strategy on addressing poverty (World Development Report (WDR) on Poverty, 2000/01). Whilst a participatory approach allows developing understanding of poverty and inequality from different perspectives, it may also present challenges, particularly for defining policies and intervention strategies since multiple perspectives on what poverty means might be discovered (Spicker, 2007).

The call for triangulation

Since quantitative measurement alone is inadequate in developing a full picture of poverty and inequality, combining quantitative with qualitative approaches, in particular through participatory research, has been widely proposed (Lister, 2004; White, 2002; Oya, 2015; Sumner, 2007). In this way, the dominance of poverty and inequality measurement can be dispelled to enable a wider discussion based on what matters for people (McGee & Brook, 2001; White, 2002). This research uses a mixed-methods approach of quantitative and qualitative methods to explore poverty and inequality (see: Chapter 5. Research methodology).

2.3.4. Poverty and inequality in a tourism context

Perspectives on tourism as a tool for poverty reduction

Since the 1960s, the potential of tourism to reduce poverty and inequality has been acknowledged under the neoliberal paradigm that promoted tourism as a tool for development (Sharpley & Telfer, 2015). However, from the 1970s onwards, this potential of tourism has been questioned, following a critical approach based on Frank's (1969) dependency theory, due to existing structural inequalities in the international tourism industry (Schilcher, 2007). To overcome these existing inequalities in the international mainstream tourism industry, small-scale tourism development as an alternative to large-scale tourism was advocated (Harrison, 2008; Knight et al., 2017). In particular, community-based tourism (CBT) with locals being directly involved in tourism planning and decision-making and having direct control

[4] A PPA is an iterative, participatory research process that seeks to understand poverty from the perspective of a range of stakeholders and to directly involve them in planning follow-up actions (Narayan, 1999).

over development and benefits, was promoted from the 1990s (Nair & Hamzah, 2015; Sebele, 2010). However, the success of the concept has become questioned with a range of CBT initiatives having failed, in that they lack economic viability due to a lack of knowledge, skills and market access (Goodwin & Santilli, 2009; Mitchell & Muckosy, 2008). Bianchi (2018:89) further addresses that *"the advocacy of small-scale 'community-based' forms of tourism often fell short of full-blown political economy analysis"*; thus, indicating that CBT assessments fail to include an analysis of socio-economic aspects combined with power relations.

With the adoption of the Millennium Development Goals (MDGs), poverty and tourism as a tool to reduce poverty entered the agenda of international development organisations (IDAs) and the practitioner movement of pro-poor tourism (PPT) emerged (Harrison, 2008; Mitchell, 2012; Scheyvens, 2009; Scheyvens, 2007). Harrison (2008:855) points out that *"strategies derived from a PPT perspective are formulated to incorporate the poor into capitalist markets by increasing the employment and entrepreneurial opportunities, and more collective benefits, available to them"*. Thus, unlike CBT, PPT suggests integrating the poor in the mainstream tourism industry. Similarly, Scheyvens (2011:31) emphasises that

> *"the people behind the PPT partnership firmly believe that it is important to bring about changes in mainstream tourism, including challenging corporations to change the way they operate, rather than to establish numerous community-run bungalow ventures with dubious business prospects".*

To implement change and *"unlock opportunities for the poor"* within tourism, combined efforts of all stakeholders involved in tourism are crucial (Ashley, Roe & Goodwin, 2001:2). Bennett, Roe and Ashley (1999) identify that opportunities for the poor in mainstream tourism are actually promising since it is a labour-intensive industry, employs an unskilled and low-skilled workforce, has low entry barriers and depends on other sectors such as agriculture. Ashley and Mitchell (2008) confirm that there are manifold ways for the poor to participate in mainstream tourism due to its complex nature including planning, transport, accommodation, food and drinks, shopping and entertainment/activities provided by direct service providers and being dependent on secondary suppliers such agriculture or construction (see: Figure 2-1).

Mitchell and Ashley (2010) suggest three pathways by which tourism can transfer benefits and costs to local communities: [1] direct, [2] indirect and induced impacts, and [3] dynamic effects. The first pathway refers to direct flows from direct tourism service providers to low-income groups (e.g. wages from work in the accommodation or food and beverage sector or support initiatives and schemes). Mitchell (2012) argues that the direct impacts are fairly local to the destination; however, can also reach communities outside the destination (e.g. remittances from migrant workers).

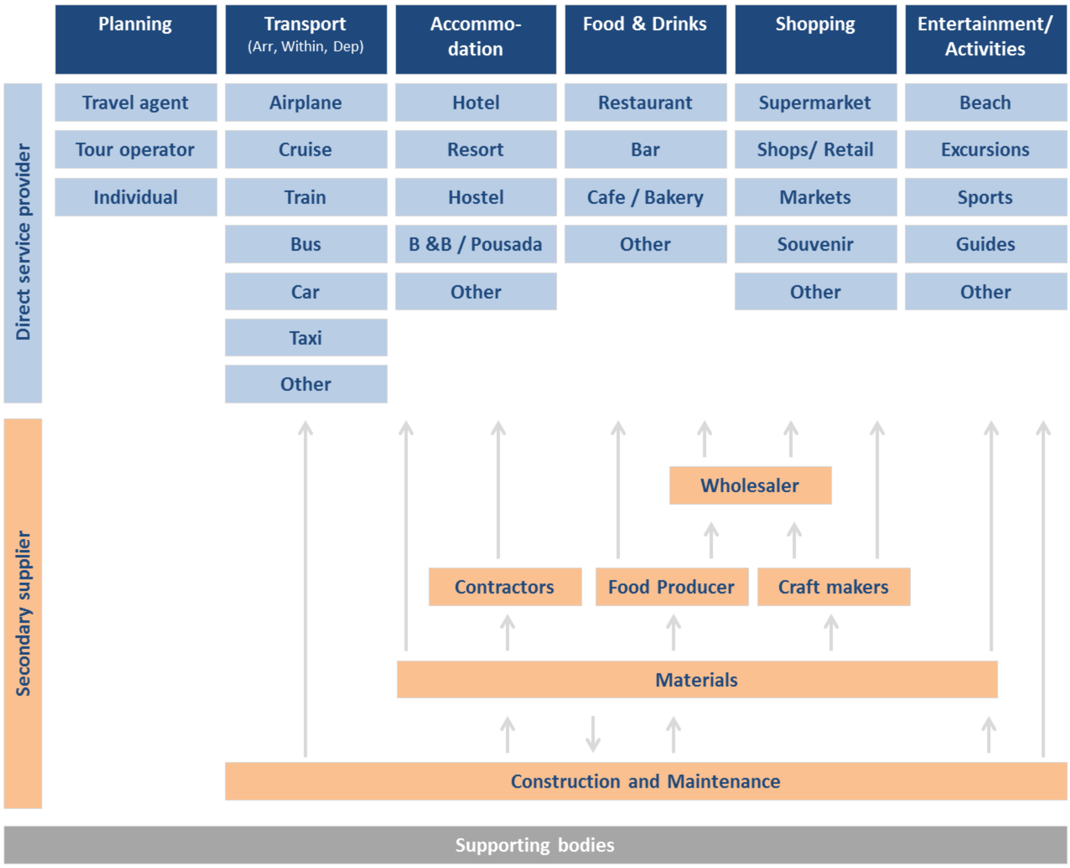

Figure 2-1: Tourism Value Chain
Source: Author, adapted from SNV and UNWTO (2010)

The second pathway relates to indirect flows, in that tourist activity stimulates secondary sectors, for example, supply of food and beverages or construction. It has been argued that indirect impacts of tourism on poor communities might be significantly higher than direct impacts (Meyer, 2007; Mitchell, 2012). Thus, it has been suggested to increase backward linkages with secondary sectors to advance economic development at broader scale (Meyer, 2007). However, often secondary products are not available locally so that they need to be sourced from outside the destination leading to leakages (Mitchell & Ashley, 2010). Induced impacts result from spending of people employed in tourism in the local economy (ibid). The third pathway refers to positive and negative dynamic effects of tourist activity which are the longer-term non-monetary impacts, for example, improved skills due to employment and training in tourism or scarcity of resources (ibid). Due to the variety of impacts tourism can have on poverty reduction, tourism has been frequently adopted as tool for development by IDAs (Spenceley & Meyer, 2012; Truong, 2018).

Currently, inclusive growth is central to the agenda of IDAs (Scheyvens & Biddulph, 2018). The World Bank (2009:1) defines inclusive growth as growth *"that allows people to contribute to and benefit from economic growth".* More specifically, growth should be *"broad-based across sectors, and inclusive of the large part of the country's labor force"* in order to be sustainable. Although the terms of inclusive growth and pro-poor growth are often used interchangeably in tourism, Bakker and Messerli (2017) argue that they are distinct. Firstly, central to the concept of inclusive growth is that *"growth is coupled with equal opportunities"* (Rauniyar & Kanbur, 2010:457), whilst growth can be pro-poor even if the poor do not equally benefit. Secondly, the concept of pro-poor growth focuses on people below the poverty line, whilst inclusive growth aims to benefit a wider group of the population (Ianchovichina & Lundstrom, 2009). Thirdly, inclusive growth seeks to widen the size of the economy and generate productive employment with a long-term perspective; thus, it combines macro-level growth of the economy with micro-level determinants (World Bank, 2009). In contrast, pro-poor growth focuses on creating opportunities at micro level (Bakker & Messerli, 2017). The shift in focus from pro-poor to inclusive growth is reflected in the United Nation's Sustainable Development Goals with two goals specifically addressing inclusive growth (ibid). Only recently, the concept of inclusive tourism emerged, which has been defined by Scheyvens and Biddulph (2018:592) as *"Transformative tourism in which marginalized groups are engaged in ethical production or consumption of tourism and the sharing of its benefits"*. They (ibid) clarify that their understanding of inclusive tourism takes a holistic approach in line with the inclusive development agenda, which focuses on overall welfare and not just on economic growth.

Current (academic) perspectives on tourism as a tool for poverty reduction ask to leave the simplistic view of tourism as either good or bad for the poor behind (Meyer, 2009). Acknowledging that the reality is far more complex, research should seek to *"develop a nuanced understanding of the links between tourism and poverty reduction: tourism is neither a panacea nor the root of all problems for developing countries"* (Scheyvens, 2011:43). In that respect, researchers are interested in developing a holistic picture of the *"multi-layered and intricate web of structures, agents and interactions that interweaves external conditions with local ones in both cooperative as well as competitive ways"* (Teo, 2003:460 as cited in Scheyvens, 2011:42) instead of simply focusing on measuring the impacts of tourism. Accordingly, analysing power and power relations is central to developing a holistic picture (e.g. Bianchi 2018; Bianchi, 2009; Bramwell, 2007; Erskine & Meyer, 2012; Meyer, 2009). Bianchi (2009:498) comments that tourism research can only advance by adopting critical approaches that integrate *"the study of discourses with agency, as well as material forms of power if it is to constitute a radical departure from the status quo in Tourism Studies"* (see: further discussion on the role of power relations in Section 2.4.4. Power in tourism research).

Understanding and defining poverty and inequality in tourism research

Tourism researchers seldom explicitly explain which definition of poverty is adopted in their studies, despite the complexity of the concept of poverty and the need for clarification. Medina-Muñoz, Medina-Muñoz and Gutiérrez-Pérez (2016) confirm this in their analysis of empirical studies on tourism and poverty alleviation published between 1999 and 2014, in that they analyse these studies using geographical scope, level of analysis, tourism context, study methods and poverty measure without making reference to any definitions adopted. They (Medina-Muñoz et al., 2016:271) point out that *"there is no consensus on poverty dimensions (i.e. economic and non-economic indicators) to be measured or the suitable values to be achieved"* and this leads to difficulties in developing holistic understanding of the relationship between tourism and poverty. This identified weakness supports Meyer's (2009) request of integrating broader theoretical discussions into tourism impact studies. In that respect, Spenceley and Meyer (2012:311) argue that merging theory and practice might *"help to expedite poverty reduction through tourism"*.

Inequality *"focuses primarily on the distribution of economic factors (such as income or consumption) across the whole population, and it requires a comparative analysis within that society"* (Spenceley & Meyer, 2012:299). Inequality is perceived to be a minor component in studies on tourism and poverty reduction. Research under the PPT-umbrella, for example, focuses on increasing the net benefit for poor people, whilst the relative distribution of benefits is not specifically considered, in that it is claimed that tourism can still be pro-poor "*if richer people benefit more than poorer people"* (Ashley et al., 2001:2). Chock, Macbeth and Warren (2007:37) confirm that PPT only loosely links poverty and inequality by arguing that PPT requires only *"some analysis of the distribution of both benefits and costs"*. Additionally, Bianchi (2018:92) points out that despite the success of tourism-led poverty reduction programmes, assessments tend to focus on economic analysis without *"any political economy underpinning"* with the consequence *"that they have a tendency to ignore questions of distributive justice and the role of the state in shaping the wider economic framework within which such benefits can be sustained and accrue more widely"*. Similarly, Bwalya-Umar and Mubanga (2018), Muganda, Sahli and Smith (2010) and Truong et al. (2014) stress the importance of connecting the distribution of tourism impacts to poverty analyses. A stronger focus on distributional issues is reflected in the concept of inclusive tourism in considering that marginalised or disadvantaged groups need to be involved in ethical production and consumption of tourism and sharing of economic and social benefits of tourism (Scheyvens & Biddulph, 2018).

Sen's capability approach in tourism research

An underlying theory for developing understanding of poverty and inequality is Sen's capability approach. Although the approach has become influential in development studies (Robeyns, 2016), *"tourism literature seems completely lacking in the application of the capabilities approach of Sen"* (Croes, 2012:542). Thus, Croes' (2012) study is one of a few that applies Sen's capability approach in a tourism context. The study seeks to assess the relationship between tourism and human development in two developing countries in Central America, namely Costa Rica and Nicaragua (ibid). Based on Sen's capability approach, the study (Croes, 2012:542) defines human development *"as the command of basic capabilities such as a long and healthy life, and the enlarging of people's choices to have a meaningful and creative life".* To measure human capabilities, Croes (2012) utilises the dimensions of the UNDP Human Development Index (HDI), namely health (captured by life expectancy), education (by literacy and school enrolment) and standard of living (by GDP per capita). This study reveals a tenuous relationship between tourism and human development in both cases, in that tourism growth supports capability expansion by having better access to health, education and food. The case of Costa Rica, however, indicates that over time these effects diminish since tourism revenues might be redistributed to other areas than health and education such as security, which can have a significant impact on human development of poor households.

A second study (Dorjsuren, 2014) applies Sen's capability approach to explore how tourism contributed to quality of livelihoods and standard of living, taking particularly questions of equality and inequality into account, in rural Mongolia. Using a broad set of priorities for people's standard of living (SoL), namely, livelihood sources, material wealth, social services and socio-cultural elements, the study asks participants to *"express important capabilities for their lives, based on the assumption that they can be the best judges of their own SoL"* (Dorjsuren, 2014:64). Participants stressed the importance of employment and generating income of SoL, whilst *"material wealth seemed to be widely unrelated to the SoL"* (Dorjsuren, 2014:197). Social services such as health and education were emphasised by participants by linking a fruitful life to good health and providing education for their children (ibid). Socio-cultural elements were found to be strongly linked to social networks, in terms of community, relatives, friends and colleagues, and government officials (ibid). In that regard, Dorjsuren (2014:197) assumes *"that having wider social networks in rural areas provided opportunities for people to achieve some of their goals"* and foster economic well-being.

Both studies (Croes, 2012; Dorjsuren, 2014) are distinct in their methodological approaches: whilst Croes' (2012) study utilises a quantitative approach[5] to assess the relationship between tourism and human capabilities (defined by HDI-dimensions) at macro-level, Dorjsuren (2014) applies a qualitative approach based semi-structured, face-to-face and focus group interviews and participant observation to, firstly, interrogate the importance of human capabilities (livelihood sources, material wealth, social services and socio-cultural elements) and, secondly, to explore the distribution of environmental benefits and burdens as a result of tourism development. Focusing on the micro-level, Dorjsuren's (2014) seeks to specifically mirror the local context.

A recent study by Knight (2018) embeds Sen's capability approach within Jessop's strategic-relational approach - thus, takes a different theoretical approach than Croes (2012) and Dorjsuren (2014). Using qualitative research (participant observation, semi-structured interviews and document analysis), the study (Knight, 2018), firstly, assesses local-level strategies to alter institutional limitations to poverty reduction in the cases of two tourism associations in Peru's Valle Sagrado using Jessop's strategic-relational approach) and secondly, evaluates the potential of these strategies to improve individual and collective functioning for associations and their members using Sen's capability approach. The findings (Knight, 2018:642) suggest that, when institutional limitations are strategically altered by local people, it can contribute to poverty reduction by enhancing individual and collective functioning in terms of

> *"increased associational cohesion and respect for leadership, greater equality in the distribution of income and visitors, more community-wide opportunities to participate in tourism […], stronger commitment to collective goals, and enhanced sense of fair compensation in spending time (as opposed to wasting it) preparing for or interacting with visitors".*

Researching poverty and inequality in tourism

To research poverty and inequality in a tourism context, academics have predominantly taken a quantitative approach using income as a key indicator (Spenceley & Meyer, 2012). However, there is no methodological agreement on how to measure the impacts of tourism on poverty reduction (Mitchell, 2012; Mitchell & Ashley, 2010). Furthermore, Medina-Muñoz et al. (2016) argue that there is neither agreement on information sources nor on analytical techniques, which hinders

[5] based on co-integration technique based on the Granger representation theorem

comparability of studies. Despite the dominance of quantitative measurement, there are claims for applying qualitative approaches to analyse the impact of tourism on poverty (e.g. Spenceley & Meyer, 2012; Schilcher, 2007). Schilcher (2007:170) points out that poverty *"should not only be perceived in terms of economic parameters"* - instead broader approaches should be adopted. Similarly, Spenceley and Meyer (2012) suggest combining quantitative and qualitative approaches in order to develop holistic understanding of the relationship between tourism and poverty.

Truong et al. (2014:1071) study perceptions on tourism as a tool for poverty reduction among poor people in Vietnam and put forward that *"poor people's interpretation of poverty may be substantially different from that of academics and policy-makers"* and emphasise the need for adopting participatory approaches. Similarly, Holden, Sonne and Novelli (2011) emphasise the need for giving poor people a voice, through participatory processes, in order to express their views regarding the impacts of tourism on their lives. To date, only a few studies use a participatory approach to examine the perspectives of poor people on how tourism influences their lives (Truong, 2018). Truong et al. (2014:1087) conclude that *"it is only by valuing the perspectives of those, who are experiencing poverty that meaningful approaches to alleviating poverty through tourism become clearer and more likely to succeed".*

Empirical evidence of tourism impacts (on poverty and inequality)

Empirical evidence of the impacts of tourism on poverty is scarce (Medina-Muñoz et al., 2016) - particularly, in terms of the multidimensionality of poverty because tourism research to date predominantly uses quantitative approaches using income as a key indicator. A more recent study by Knight et al. (2017) uses a qualitative approach to study local perceptions on tourism and poverty in four rural communities located outside Cusco (Peru). The study (Knight et al., 2017:351) shows that while many people described *"poverty in terms of income, money, or employment, perceptions in general proved to be far more complex, alluding to a range of aspirations, deprivations, personal decisions and shortcomings, and historical, environmental, or institutional factors contributing to local-level vulnerabilities".* Furthermore, *"perceptions of well-being and poverty were often linked to non-economic factors, such as an ability to provide for others, to work hard, to contribute to the community, to be respected, and to avoid vices such as laziness or lying"* (Knight et al., 2017:351). Nonetheless, they (ibid) clarify that *"while descriptions of poverty and well-being in non-economic terms were prevalent, those linking poverty and tourism with employment or income were more so".*

Medina-Muñoz et al. (2016) further argue that tourism literature is disjointed by focusing on different types of tourism (e.g. CBT) and different geographical areas with the consequence that studies cannot be compared. Nonetheless, they (ibid) discover that studies on tourism and poverty alleviation address a variety of impacts and suggest grouping these into (1) net (economic) impacts on poverty, (2) livelihood and sociocultural impacts and (3) environmental impacts. Interestingly, although net (economic) impacts are researched, it seems that analyses of patterns of consumption i.e. on how tourism-related income is used have received limited attention in tourism research to date. Furthermore, distributional issues are rarely considered in tourism studies on poverty alleviation (as mentioned before).

This section continues by providing empirical evidence of tourism impacts on poverty and inequality related to (1) net impacts, (2) livelihood and sociocultural impacts, (3) environmental impacts and (4) distributional impacts. Since studies providing empirical evidence of the impacts of tourism on poverty reduction (Medina-Muñoz et al., 2016) and, particularly, in combination with inequality (e.g. Bianchi, 2018; Bwalya-Umar & Mubanga, 2018; Truong et al., 2014) are limited, further studies on residents perceptions are integrated to provide a comprehensive picture of potential tourism impacts.

(1) Net impacts

Net impacts of tourism on income-poverty have been researched at a national, regional and local level. In his national level study, Croes (2014:221,222) identifies that *"tourism matters for the poor"* in Nicaragua which has one of the lowest levels of economic development, while *"tourism does not seem to matter for the poor"* in Costa Rica having a higher level of economic development. Thus, Croes (2014:222) concludes that *"tourism development matters most for the poor at lower levels of economic development"*, whilst it does not have systematic effects on poverty reduction. In the case of Brazil, Blake, Arbache, Sinclair and Teles (2008) identify that tourism has a positive effect on all income groups, in particular, the lowest- and low-income groups of the Brazilian society, and conclude that tourism has the potential to reduce income-poverty (see also: 4.5. Tourism research in Brazil's Northeast - the current state of knowledge).

At a regional level, contradictory evidence is available, in that, for example, a positive impact is discovered in the case of protected areas in Costa Rica (Ferraro & Hanauer, 2014), whilst a study by Holden et al. (2011) finds that tourism contributes only marginally to poverty alleviation in Elmina (Ghana). Similarly, studies researching the impacts of tourism at a local (case study) level also provide contradictory evidence: Mbaiwa (2005, 2011) identifies that tourism does not reduce poverty in the case of Okavango Delta in Botswana, whilst Scheyvens and Russel (2012) analyse that (small- and large-scale) tourism significantly contributes to income generation for the poor focusing on a case in Fiji. The potential of tourism to stimulate economic growth, to strengthen linkages with other sectors and indirect impacts on the wider economy, and to generate revenue and employment has frequently been reported (e.g. Croes & Vanegas, 2008; Saayman, Rossouw & Krugell, 2012). Various studies, however, also draw attention to dependency relationships resulting in converse effects, in that these weaken domestic linkages and limit accessibility to employment and income-generation for poor people (Holden et al., 2011; Mbaiwa, 2005; Scheyvens & Russell, 2012; Zapata, Hall, Lindo & Vanderschaeghe, 2011).

(2) Livelihood and socio-cultural impacts

In terms of livelihood and socio-cultural impacts, tourism is considered to improve people's overall standard of living - which has been pointed out by studies examining residents' perceptions towards tourism development, whilst attention is also paid to negative effects (e.g. Almeida-García, Peláez-Fernández, Balbuena-Vázquez & Cortés-Macias, 2016; Bowden, 2005; Butcher, 2011; Muganda et al., 2010). Almeida-García et al.'s (2016) study, for example, that focusses on residents' perceptions of tourism development in a tourist destination in Spain identifies various positive and negative impacts (see: Table 2-b).

Positive aspects	Negative aspects
Tourism improves the quality of life	Tourism increases drugs and alcohol
There are more theatres and exhibitions	Tourism causes more crime
Tourism improves public services (health centres, sport, etc.)	Tourism produces more congestion, accidents and parking problems
Tourism stimulates our festivals and traditions (Easter, fairs, ...)	Tourism generates loss or change of our festivals and traditions
I relate to people who speak Spanish	
I relate to Spanish people who speak my language	

Table 2-b: Residents' perceptions towards tourism development
Source: Author, adapted from Almeida-García et al., 2016:264

Daldeniz and Hampton (2013) examine impacts of dive tourism on local communities in Malaysia. The study (ibid) reveals several negative socio-cultural impacts including weak social linkages between the locals and an external workforce, the 'demonstration effect' of tourist behaviour primarily on young people and adults, for example, in terms of alcohol consumption, and problems in relation to alcohol consumption, drug usage and crime. Other studies (e.g. Almeida-García et al., 2016; Bwalya-Umar & Mubanga, 2018) also confirm the perception of residents that tourists bring drugs, alcohol and crime to the destination leaving harmful impacts to local communities. While Almeida-García et al. (2016) identify that tourism encourages celebrating festivals and traditions, Daldeniz and Hampton (2013) find that these [=festivals and traditions] are not used by local communities to generate income from tourism. Several studies refer to the importance of communication between host and guest (e.g. Almeida-García et al., 2016; Oezel & Kozak, 2017). In that regard, Oezel's and Kozak's (2017) study emphasises that residents value communication with tourists from different cultures, which leads to greater mutual understanding and tolerance.

In the case of tourism development in Tanzania, Muganda et al. (2010) assess whether and to what extent positive impacts of tourism trickle down to local people and lifts them out of poverty. They (2010:629) conclude that *"most of the local community felt tourism development is having a positive impact and contributing to poverty alleviation"*, particularly in terms of improving infrastructure, transport and telecommunication. Several studies support that tourism development contributes to urbanisation and infrastructure development by improving access in transport, communication, education and health-care services (e.g. Almeida-García et al., 2016, Bowden, 2005; Manwa & Manwa, 2014). However, Muganda et al.'s (2010) study also shows that as a result of tourism development prices increase dramatically. Firstly, due to tourism, demand for goods and services increases, resulting in shortages of supply and, consequently, in higher prices; secondly, suppliers tend to focus on serving tourist markets with the consequence that locals cannot afford to buy goods and services (ibid). In particular, Bwalya-Umar and Mubanga (2018) point out that the effect of price increases in basic goods and services is more strongly felt by poorer households.

Supply shortages are not only due to tourists visiting the destination, but due to migration that leads to an overall growth of the population (e.g. Hoffman, 2011; Wittemyer, Elsen, Bean, Burton & Brashares, 2008). While Wittemyer et al. (2008) believe that migration is due to the variety of job opportunities in tourist areas, Hoffmann's (2011) study suggests that poor economic conditions combined with limited availability of resources in home communities pushes people to migrate. A recent study by Truong (2018) focusing on the role of tourism in reducing poverty of street vendors in Hanoi (Vietnam) shows that vendors migrate from rural areas to cities with economic motivations (i.e. better jobs and incomes) since their traditional ways of generating income e.g. through farming have declined. Irrelevant of people's decision to migrate, it leads to extensive population growth in particular areas which has affects the natural environment and threatens biodiversity (ibid).

(3) Environmental impacts

Environmental impacts of tourism development are frequently identified by studies (e.g. Almeida-García et al., 2016; Bwalya-Umar & Mubanga, 2018; Daldeniz & Hampton, 2013; Mbaiwa, 2005; Su, Wall & Jin, 2016; Truong et al., 2014). Bwalya-Umar and Mubanga (2018) explain that residents perceive that the council has an interest in keeping the city clean and green for tourism. Daldeniz and Hampton (2013) particularly stress that, due to initiatives encouraging collaboration between tourism actors and the local population related to environmental issues and raising environmental awareness, positive educational effects emerge. However, despite raising awareness, Mbaiwa (2005) notes that tourism development does not necessarily lead to greater environmental conservation. Similarly, only 10% of respondents in Bwalya-Umar and Mubanga's study (2018:343) believe that *"tourism had directly led to the conservation of natural resources"*. Bwalya-Umar and Mubanga (2018) further explain that neither environmental benefits nor environmental costs are strongly addressed by participants.

(4) Distributional impacts

Distributional issues in tourism research on poverty alleviation are considered by Bwalya-Umar and Mubanga (2018) focusing on Zambia, by Knight et al. (2017) in relation to Peru, by Muganda et al. (2010) in the case of Tanzania and by Truong et al. (2014) exploring the case of Vietnam. Muganda et al. (2010:644) conclude that tourism *"in the study area seems characterised by disparities in access to opportunities and benefits"* among different groups in the community. Knight et al. (2017) evaluate perceptions among locals and argue that tourism extends and intensifies pre-existing socio-economic inequalities, which results in rejection towards tourism development. Similarly, Truong et al.'s (2014) study on the perception of poor people towards tourism and poverty reduction reinforces that adequate attention should be paid to the distribution of tourism impacts since, otherwise, negative perceptions might arise, which lead to conflict in the society. A more recent study by Bwalya-Umar and Mubanga (2018) stresses that residents perceive tourism benefits to be unequally distributed, in that poorer households view local elites (big tourism-related businesses) and the state and state representatives as beneficiaries of economic benefits, whilst only a few, if any, accrue to them. The study (ibid) emphasises that tourism developers need to take differences of residents' socio-economic class into account in order to not lose their support for tourism.

2.4. Tourism and power

The third theme discussed in this chapter is power. After reviewing theories of power, particularly, focusing on Giddens' structuration theory, tools to research power are briefly presented. Thereupon, a review of how power is understood and analysed in tourism research is provided.

2.4.1. Understanding and defining power

'What is power?' - there is neither a single nor a simple answer to this question since power is an *"essentially contested concept"* (Lukes, 1974, 2005:137). Haugaard and Glegg (2009:1) point out that *"it is arguably one of the most difficult concepts to make sense within the social sciences".* However, to achieve understanding of society, it is essential to conceptualise power (ibid). Haugaard (1997) explains that there are two main perspectives of power: conflictual and consensual theories - which are explained in more depth in the following. Foucault's (1978) *"power is everywhere"* can be regarded as a third main perspective of power[6]. Due to difficulties in its practical application (Gaventa, 2003) it was not further considered for this study.

Conflictual theories: power as domination

Contemporary understanding of power as domination[7] has been shaped by Dahl (1957, 1961, 2006), Bachrach and Baratz (1962, 1963, 1970) and, particularly Lukes (1974, 2005), who entered the arena in the mid-1970s (Haugaard & Glegg, 2009). Lukes (1974, 2005) was concerned with the question of why agents give consent to structural domination. He (2005:114) asserts that three-dimensional power impacts on agents, in a way that they live less free *"as their nature and judgement dictate"*. Table 2-c presents the three forms of power: overt, covert and latent power.

The three dimensions of power are frequently linked to a 'zero-sum game' with one party gaining at the expense of the other: the powerful and the powerless (Haugaard, 2012). The first dimension 'overt power' represents a pluralist perspective in which power sits within a political system that is open for scrutiny. While this dimension of power can be considered legitimised, the second dimension 'covert power' (representing an elitist perspective) prevents legitimisation, in a way that it recognises that power is exerted when issues are not brought to discussion. The third dimension demonstrates *“the means through which power influences, shapes or determines conceptions of necessities, possibilities and strategies”* (Gaventa, 1980:15). Accordingly, people accept the exercise of power within a given system (e.g. religion)

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[6] Foucault (1978) shaped a 'new' understanding of power since in his view power is neither agency nor structure (Gaventa, 2003). Foucault's work follows Nietzsche's tradition by diffusing power relations among the individual (Daldal, 2014). Since power in Foucault's considerations cannot be localised, Foucault's concept is distinct in a way that power is not considered within binary oppositions (Daldal, 2014). Foucault considers power as *"essentially relational"* with *"no zero in this game"* (Coleman, 1997:41). This understanding goes back to a democratic understanding of power i.e. everyone always has power (Coleman, 1997). Gaventa (2003) emphasises that power in the Foucauldian sense is not only negative, but can be positive since it is 'everything'.

[7] Conflict theories of power can be traced back to Marx, Weber and Gramsci (Heywood, 1994).

because of their belief in it - which can be used for manipulation (Lukes, 1974). Haugaard (1997:401) points out that a conflictual view of power fails *"to explain the extent to which consensual power of democracies outstrips coercive resources"*.

Form of power	Description	Reference
Overt	**A has power over B to the extent that he can get B to do something that B would not otherwise do.**	**Dahl (1957)**
Covert	**Power is also exercised when A devotes his energies to creating or reinforcing social and political values and institutional practices that limit the scope of the political process to public consideration of only those issues which are comparatively innocuous to A. To the extent that A succeeds in doing this, B is prevented, for all practical purposes, from bringing to the fore any issues that might in their resolution be seriously detrimental to A's set of preferences.**	**Bachrach and Batz (1962)**
Latent	**A may exercise power over B by getting him to do what he does not want to do, but he also exercises power over him by influencing, shaping, or determining his very wants.**	**Lukes (1974, 2005)**

Table 2-c: Lukes' three forms of power
Source: Author, compiled from Partzsch and Fuchs (2012) and Powercube (2009)

Consensual theories: power as capacity

Consensual theories of power associated with work by Parsons (1964), Arendt (1970) and Barnes (1988) lead the way for agency (Haugaard & Glegg, 2009). Arendt (1970:44) views power as collective capacity based on consensus by arguing that

> *"power corresponds to the human ability not just to act but to act in concert. Power is never the property of an individual; it belongs to a group and remains in existence only so long as the group keeps it together. When we say of somebody that he is 'in power' we actually refer to his being empowered by a certain number of people to act in their name. The moment the group, from which the power originated, to begin with… disappears, 'his power' also vanishes".*

For Parsons (1964, 1967) and Arendt (1970) power does not simply exist - instead power is socially produced through interactions of agents. Barnes (1988:57) develops the concept of social power which he describes as *"the added capacity of action that accrues to individuals through their constituting a distribution of knowledge and* *thereby a society"*. Accordingly, power exists in people's actions rather than being directed from powerful to less powerful (Goehler, 2009). Thus, they challenge the view of power being a zero-sum game between the binary opposition of the powerful and the powerless (Haugaard & Glegg, 2009). Consensual theories, however, face the criticism of not providing *"conceptual space for the conflictual aspect of social life"* - as addressed by conflictual perspectives (Haugaard, 1997:401).

Both, conflictual and consensual theories, have been confronted with the 'structure-agency-debate', in that the former has been criticised for its 'over-concern' with structural analyses, and the latter for its strong agency-centred focus (Calhoun, Gerteis, Moody, Pfaff & Virk, 2007; Collins, 1994; Ritzer, 2007). Giddens' structuration theory *"stands as the middle ground"* (Hustedde & Ganowicz, 2002:14) by integrating an agency-centred approach into structural analysis. The next section provides a discussion of Giddens' (1979, 1984) structuration theory.

2.4.2. Giddens' structuration theory

Background

Giddens' structuration theory (1979, 1984) can provide theoretical insights in a development context *"because it links disparate macro theories about structure and conflict with micro theories about individual and group behaviour"* (Hustedde & Ganowicz, 2002:15). Similarly, Gaventa (2003) agrees that applying structuration theory to development can be valuable, in particular, because it provides a framework that enables an evaluation of power in social relationships at a local level and within broader societal structures. The basis of all social relationships is social interaction being defined as *"the reciprocal influence mutually exerted by human beings through interstimulation and mutual response"* (Sharma & Sharma, 1997:219). They (1997) add that the reciprocal influence can be direct or indirect. Direct interactions involve a human being immediately; in indirect interactions a human being is *"equally influenced, but has no direct or immediate input into the interactions that affect him or her"* (Lewis & Feiring, 1981:129).

Central ideas: structure, agency and the duality of structure

Structuration theory proposes that agency and structure are in a social relationship, which evolves over time and space since repetitive actions of agency reproduce structure, which, in turn influences agency in a way that it enables or restricts their activities (Giddens, 1979). Thus, structure is considered as both the medium and outcome of human practices that constitute social systems - which is mirrored in Giddens' (1979:92) concept of the duality of structure which *"relates to the fundamentally recursive character of social life, and expresses the mutual dependency of structure and agency".*

Giddens views social systems as the *"empirically observable, intertwining, and relatively bounded social practices that link persons across time and space"* (Sewell, 1992:4-5). Sewell (1992:5) points out that, according to Giddens, social systems *"have no existence apart from the practices that constitute them, and these practices are reproduced by the 'recursive' (i.e. repeated) enactment of structures"*. Consequently, structures only exist virtually in the *"memory traces, the organic basis of knowledgeability, and as instantiated in action"* (Giddens, 1984:377). Accordingly, by having acquired *"tacit modes of knowing how to go on in the contexts of social life"* and drawing upon this 'tacit knowledge' in social interactions, actors reproduce structures that constitute social systems (Giddens, 1982:9).

Therefore, studying social systems requires an evaluation of agents' knowledgeability of actions and interactions and how these actions and interactions have become standardised, so that structural features emerge over time and space (Giddens, 1982 & 1984). Time and space describe the context for social life and institutions in all societies (Giddens, 1984). Giddens (1984) proposes three notions to understand 'space', which are 'locale', 'co-presence' and 'presence availability'. Locale refers to *"the use of space to provide settings of interaction, the settings of interaction in turn being essential to specifying contextuality"* (Giddens, 1984:118) - in other words, locales are crucial for social interaction among agents to take place, whilst locales are not only physical properties, but encounters among agents (Dell'Orto, 2002). A state of co-presence is defined by agents' sensing *"that they are close enough to be perceived in whatever they are doing, including their experiencing of others, and close enough to be perceived in this sensing of being perceived"* (Giddens, 1984:67-68). 'Being close' requires means for agents' coming together, which is represented in the concept of presence-availability (Dell'Orto, 2002).

Giddens' understanding of power in the duality of structure

Giddens (1979) identifies three dimensions of social interaction, namely communication, power and sanctions which are linked through modalities of interpretive scheme, facility and norm with their corresponding dimensions of structure, namely signification, domination and legitimation (see: Figure 2-2).

He (ibid) describes that the modalities are central, in that they are the 'bridging elements' for agents to draw upon resources, and, at the same time, the media to reproduce structure. Giddens (ibid) clarifies that dimensions are not separate entities, but they are inextricably connected and occur in all social interactions. He (1979:81-82) emphasises this by arguing that *"the communication of meaning in interaction does not take place separately from the operations of relations of power"*.

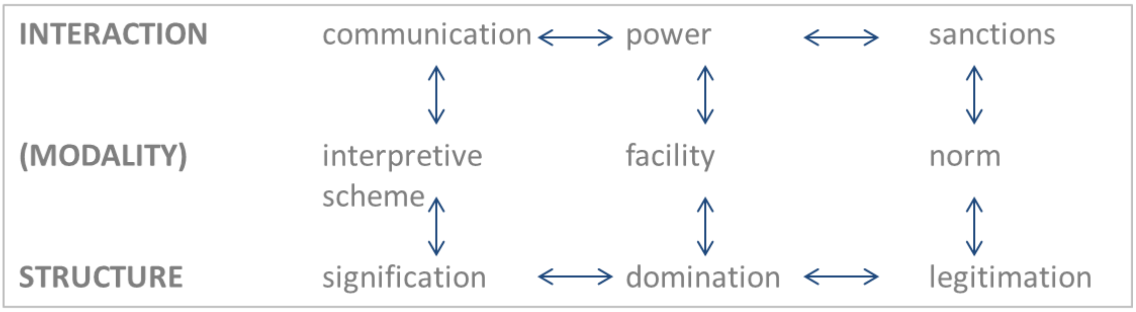

Figure 2-2: Dimensions of agency
Source: Author, adapted from Giddens (1979:82)

Communication (e.g. language) forms an integral part of social interaction, in that without communication using interpretive schemes i.e. standardised ground of knowledge, interaction among agents could not take place (Giddens, 1979). The standardised ground of knowledge does exist in and through the process of structuration (or in other words, it is not a given, but has evolved over time). Similarly, means of signification (e.g. clothing) have evolved over time, and common interpretive schemes are required to facilitate communication (ibid). Communication in interaction is bound by normative aspects as Giddens (1979:86) explains that *"the reactions of each party to a process of interaction depend upon the contingent responses of the other or others: the response of the other(s) is thus a potential sanction upon the first and vice versa"*. In other words, interaction is based on norms representing an *"institutionalisation of conduct"* and enabling legitimation; these norms place sanctions on individuals (ibid). He (ibid) further explains that *"normative sanctions are a generic type of resource drawn upon power relations"*.

Power is integral to interaction *"in a dual sense: as involved institutionally in process of interaction, and as used to accomplish outcomes in strategic conduct"* (Giddens, 1979:88). Accordingly, Giddens (1979:91) views power as both, in that the former represents *"domination"* and the latter *"transformative capacity"*. Power in the form of transformative capacity involves agents' *"interventions in events in the world, thus producing definite outcomes, with intended action being one category of an agent's doings or his refraining"* (Giddens, 1979:88). Power itself is not a resource, but to exercise power a facility is needed (Giddens, 1979). The facility to exert power exists in the utilisation of available resources which are *"the media where transformative capacity is employed"* and at the same time *"structural elements of social systems as systems, reconstituted through their utilisation in social interaction"* (Giddens, 1979:92). Thus, it becomes evident that the concept of power as transformative capacity and as domination depends upon the use of resources. Giddens (1979:92) clarifies that power

> *"intervenes conceptually between the broader notions of transformative capacity on the one side, and of domination on the other: power is a relational concept, but only operates as such through the utilisation of transformative capacity as generated by structures of domination".*

Using an everyday example, how people are dressed to work reflects social structures, and when we encounter people at work, we use our interpretive schemes i.e. standard ground of knowledge and draw on structures of signification, to interpret the person's role (Jones & Karsten, 2003). If we see a person dressed in a very formal way in a university setting, we are likely to assume that the person is in a Senior academic or management role. Or if we see a person in a white coat in a hospital, we assume the person is a doctor. Further, the type of clothes does not only indicate who that person is, but also entails communication about the power of the person. A police uniform, for example, conveys domination and if a person in a police uniform requests certain behaviour, people are more likely to conform to that request than if the request would be communicated by a person in casual clothing. On the other hand, a person with casual clothing does not have the facility (i.e. the police uniform) to exert domination.

The appropriate type of clothing in a particular setting is defined by structures of legitimation (Jones & Karsten, 2003). For example, whereas a police officer is required to and has legitimacy to wear the uniform, it would be inappropriate for a doctor to wear a police uniform at work. Thus, at the same time, structures of legitimation place sanctions on people i.e. we cannot wear any type of clothing, but need to conform to the norms in the particular context. Structures of legitimation are reproduced and sustained as long as people conform to the norms; if people challenge the status quo (e.g. wear different type of clothing than legitimised in a particular environment), structures might change over time.

Critical perspectives on structuration theory

Criticism of Giddens' structuration theory can be distinguished in three categories, which are (1) the conflation of structure and agency, (2) the complexity and (3) the lack of methodological guidelines (Kort & Gharbi, 2013). Due the conflation of structure and agency the empirical use of structuration theory is equipped with difficulties (McAnulla, 2002). Elder-Vass (2010:8) specifies that by treating the two roles of structure and agency as *"ontologically inseparable"*, it is difficult to observe the practical interaction between both. For Giddens, however, human actors are knowledgeable and reflexive - thus, postulating that they have the ability to differentiate between their own actions and structural opportunities and constraints (Kipo, 2015). Therefore, developing understanding of structure and agency requires an active engagement of human actors in research activities. However, by assuming that actors can differentiate between structure and agency, Giddens put emphasis on agency rather than on structure (Kort & Gharbi, 2013). Similarly, Gaventa (2003) criticises Giddens' strong concern with agency, in that the power of agency is given primacy over structure so that there is not an equal division of structure and agency.

Structuration theory involves various concepts and definitions, which are highly abstract and only loosely connected (Kort & Gharbi, 2013). Thus, Pozzebon and Pinsonneault (2005) argue that the level of complexity of structuration theory makes it very difficult for the reader to understand. A key concept of structuration theory is agents' knowledgeability; however, Giddens does not provide explanations as to what knowledge actors have acquired and how they have acquired that knowledge (Sewell, 1992). Furthermore, structuration theory is criticised for the time-space concept (Kort & Gharbi, 2013). Although Giddens acknowledges the importance of time and space for social interactions, he has been criticised for failing to incorporate the complexity of hierarchy in locales, particularly, how hierarchy is constructed and reconstructed constantly (Dell'Orto, 2002; Varien & Potter, 2008; Soja, 1989). This is linked to what Soja (1989:149) describes as the *"socio-spatial clustering or agglomeration of activities around identifiable geographical centres or nodes"* which creates 'peripheralness' existing in any locale. The uneven spatial development creates tensions and conflicts that have power to transform social structures (Soja, 1980). Thus, it is important to incorporate spatial inequalities and centre-periphery relations in social research (Dell'Orto, 2002; Varien & Potter, 2008; Soja, 1989; Soja, 1980).

The conflation of structure and agency, the amount of and the high level of abstraction of concepts make the empirical application of structuration theory difficult. Therefore, Giddens' theory has been criticised for being too academic, in that it does not have practical relevance (Gaventa, 2003). Similarly, Kort and Gharbi (2013:99) point out that the lack of empirical guidelines makes an empirical application *"far from easy to do".* Giddens (1989:294), however, considers structuration theory more as *"sensitizing devices than as providing detailed guidelines for research procedure"*. Accordingly, it provides a theoretical approach to develop understanding of how actors are involved, how they interact, how their interactions have evolved and potentially led to standardised features of structural systems, and how these influence actors and how actors respond to these (Erskine & Meyer, 2012).

To investigate power relations, this study applies Giddens' structuration theory. Chapter 3. Conceptual thinking provides a discussion on how structuration theory has been utilised in this study.

2.4.3. Researching power

The difficulty and level of abstraction of theoretical concepts of power has *"no doubt contributed to the dearth of practical tools for analysing power"* (Gaventa, 2003:18). This has potentially resulted in restricting attempts at analysing power relations (VeneKlasen & Miller, 2002). VeneKlasen and Miller (2002:39) argue with regard to a development context that *"programs promoting advocacy and democracy too rarely incorporate an understanding of underlying power relationships and interests despite the importance that analysts place on these dynamics"*.

The so called 'expressions of power' have most frequently been used to analyse power (Brouwer, Kormelinck & van Vugt; 2012; Goehler, 2009). As such, the descriptive term 'power over' is associated with a form of domination, whilst 'power to', 'power with' and 'power within' are used to describe power in more equitable and collaborative ways (VeneKlasen & Miller, 2002). Building on the expressions of power and further tools, the 'power cube' (see: Figure 2-3) was developed by the Institute of Development Studies (IDS) in 2006 and since then it has gained popularity among practitioners to research power relations (IDS, 2017). The power cube is a "*framework for analysing spaces, places [=levels] and forms of power and their interrelationships"* with each side of the cube representing a set of relationships, rather than being a static set of categories (Gaventa, 2006:26).

To investigate power relations, this study draws on the notion of the power cube viewing power as a set of relationships among different dimensions and categories. However, this study applies different dimensions and categories through the use of central ideas of Frank's dependency theory and Giddens' structuration theory (see: Chapter 3. Conceptual thinking).

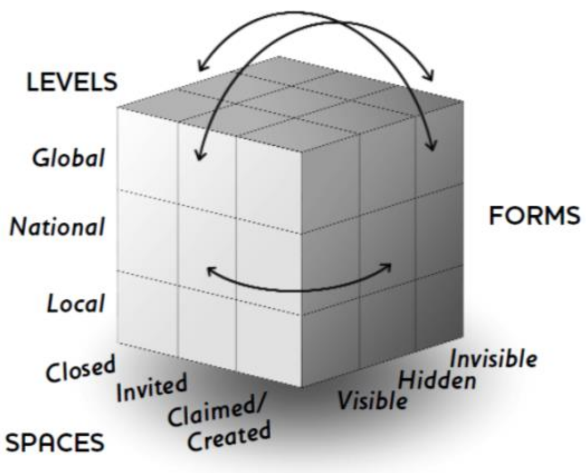

Figure 2-3: The power cube
Source: Gaventa, 2006:25

2.4.4. Power in tourism research

Background

"Power is one of the most important and contested concept in the social sciences but it has been routinely and conveniently overlooked in critical discussions of tourism" - according to Church and Coles (2007: Foreword). Similarly, Mosedale (2011) points out that the concept of power has not received central attention in critical tourism research. Whilst tourism scholars from various fields intend to develop understanding of power, they rarely do so since they insufficiently conceptualise power (Church & Coles, 2007). Church and Coles (2007:6,7) conclude that

> *"[despite] growing engagement with power there remains an important paradox in that power and power relations are […] routinely under-conceptualised in tourism […] In many instances, tourism commentators are prepared to deploy explanatory virtues of power (often as capacity or authority) but seldom they progress beyond the elementary, and hence apparently uncontentious, conceptual simplifications".*

Understanding of power

Despite the great significance of power as domination in social sciences, tourism studies rarely provide a conceptualisation of power. Church and Coles (2007:23) argue that the *"impact on tourism studies on theorisations in Weberian, elitist, pluralist or Lukesian thinking is relatively limited"* and Hall (2010:200) puts forward that Marx' and Gramsci's considerations on power *"have only been lightly touched on in tourism"*. The majority of studies tend to adopt theoretical perspectives on power as domination implicitly without explicitly recognising the influence of these theories of power on their work (Church & Coles, 2007).

Power relations have been mainly researched in the context of community-based tourism (CBT) (e.g. Blackstock, 2005; Knight & Cottrell, 2016; Ramos & Prideaux, 2014; Reed, 1997) and tourism partnership studies (e.g. Araujo & Bramwell, 2002; Bramwell, 2004; Krutwaysho & Bramwell, 2010; Nthiga, 2014; Pastras & Bramwell, 2013). Knight and Cottrell (2016) and Reed (1997) draw attention to local elites, who hold power because of historical, political or economic dominance, and show that they prevent disadvantaged or marginalised groups of society from participating in and from generating benefits from tourism development. Furthermore, Islam and Carlsen (2016:651) identify that although international development agencies try to involve poor and indigenous communities into tourism development, *"local elites, wealthy and politically motivated people are dominating the decision-making"*. They (ibid) argue that this particularly due to lack of knowledge, particularly in relation to tourism development, lack of market access and lack of bargaining power. Thus, their study provides evidence for Frank's (1969) argument that exploitative relationships extend from nations, to regions and to local centres that are dominated by elites and take away benefits from other groups. Richter (1989:53) concludes that tourism is *"particularly well-suited to assuaging elites"* and Schilcher (2007:170) adds that inequalities at micro-level *"may be aggravated between different strata of people whose livelihoods are connected to the industry, such as between managers of tourist facilities and local workers, or between 'powerful' individuals and other members of a community".* It has been found that community involvement is often merely a charade to comply with external demands (Timothy, 2007; Timothy & Wall, 1997). In such cases, people are occasionally informed rather than given the opportunity to question, criticise and design approaches and policies to tourism development (Timothy, 2002). Thus, it has been argued that more effective and meaningful strategies for community empowerment need to be employed (e.g. Knight & Cottrell, 2016; Ramos & Prideaux, 2014; Timothy, 2007).

The notion of empowerment (based on the concept of power as capacity) has been widely discussed in tourism research (Church & Coles, 2007). Ramos and Prideaux (2014) point out that the majority of studies focus on local community empowerment in developing countries. In particular, the role of women and female empowerment in these contexts has received attention (e.g. Ferguson, 2011; Ferguson, 2010; Tucker, 2007; Scheyvens, 2000). Zhao and Ritchie (2007) understand empowerment as the process to enhance and strengthen the participation of local people in political planning and decision-making processes at a local level, whilst removing barriers that limit their capacity-building. Timothy (2007:212) argues *"empowerment enables communities to exert greater self-determination in their own futures"*. He (2007) suggests that strategies for empowerment should in particular target the most disadvantaged groups such as ethnic and racial minorities, women and the poor since they are mostly affected by power struggles.

In contrast to tourism research focusing on power as authority/domination and power as capacity, studies based on the notion that 'power is everywhere' refer to Foulcault's conceptualisations. For example, Cheong and Miller (2000), Fazito, Scott and Russell (2016), Hollinshead (1999), Nyaupane and Timothy (2010), Obenour and Cooper (2010), Urry (1990, 2002) and Winter (2007) make particular reference within their area of tourism research to Foucault's conceptualisations. Hannam (2002:231), however, doubts the relevance of applying Foucauldian thought in tourism research since it *"gives a rather more subtle account of the relations between power and knowledge"*.

Understanding of power in political economy studies

In political economy studies in tourism, power is treated as an underlying theme - rather than being specifically conceptualised (Mosedale, 2011; Church & Coles, 2007).

Bianchi (2018:89) confirms that political economy analysis tends to focus on *"foreground issues of scale (i.e., 'mass' vs 'alternative' tourism) over the economic and political relations of power"*; thus, it fails to assess how *"structures and distributional outcomes of tourism development"* have been shaped. Furthermore, political economy studies employing Frank's (1969) dependency theory consider power as a given in the structural dominance, without challenging this assumption (Bianchi, 2018; Church & Coles, 2007). Bramwell (2007:3) points out that dependency theory provides valuable insights; however,

> *"in its simplest form it is based on highly generalized, structural interpretations that try to position every historical event, and place each social characteristic, as a component of some more general over-arching system, be it the world capitalist system or particular modes of production".*

Accordingly, dependency theory has been criticised for its deterministic view on structural power - ignoring human agency in influencing and transforming these structures (Bianchi, 2018; Bianchi, 2015; Chaperon & Bramwell, 2013; Meyer, 2013). Jamal and Dredge (2015:184) emphasise that *"local community members do not sit around passively under the control of external stakeholders, but actually resist colonizing actions, and negotiate their interests where possible"*. The importance of conducting research that incorporates both power as domination and power as capacity based on an appreciation of agency-structure relationships has been emphasised (e.g. Chaperon & Bramwell, 2013; Erskine & Meyer, 2012; Knight, 2018; Pastras & Bramwell, 2013); however, only a few studies explicitly conceptualise power as interplay between structure and agency using Giddens' (1979) structuration theory (Bramwell, 2015). Bramwell (2007:5) notes that Giddens' structuration theory *"has not had a great influence on tourism research, although a few commentators have suggested its potential value for the subject"*.

Bramwell and Meyer (2007) suggest a relational approach to study power and policymaking in tourism development. Exemplifying the case of Ruegen in former East Germany, their study (2007) draws on a political economy perspective and is influenced by Giddens' (1979) dialectical interconnectivity between agency and structure to explore power, policymaking and policy debates concerning tourism development. Evaluating the dialectical relations between the structure of policy networks and the various actors operating within them, they show that some actors were considered as strongly influential in tourism issues, whilst the effectiveness of policies of the island's country council was limited due to lack of political power in contrast to other municipalities and lack of economic power in contrast to developers 'from outside'. Debates and policies, in turn, influenced the shape of networks. By employing a relational perspective, the study (Bramwell & Meyer, 2007:785) provides insight into how the transition of the island's tourism industry was *"mediated through the dialectics of power relations".*

Erskine and Meyer's study (2012) explores power relations and involvement of actors in three tourism development projects in Ecuador in order to develop understanding of the duality of agency and structure. The research (ibid) shows that local residents are aware of the need to exercise some control over the project, whilst also being constrained by dependence on structures in terms of financial aid and technical expertise; on the other hand, development organisations are also dependent on the communities. Furthermore, the knowledge acquired by local residents seems to enable some sort of empowerment within the existing structures (ibid). It is found that development organisations that are strongly influenced, and confined, by their own institutional structure, have the power to impose these structures on (smaller) tourism projects, whereas private-sector funded tourism projects have greater freedom to exert agency in transforming structures (ibid). Since agency is evident in all three projects, it is concluded that *"agency has far greater power in influencing structure than frequently assumed"*, whilst acknowledging that *"structure is a constraint on human action"*, in that each project is bound by bureaucracy resulting from funding and technical assistance (Erskine & Meyer, 2012:354). Despite the differences in the extent of exerting agency, the duality of structure and agency is demonstrated in all three projects.

2.5. Conclusion and review of gaps in research

This chapter provided a critical review of the relevant literature focussing in the study's key themes of political economy, poverty and inequality, and power. For each theme, key concepts were presented and their application in tourism research was assessed enabling identification of current theoretical and methodological gaps.

The importance of applying political economy perspectives in tourism research has been emphasised in arguing that tourism cannot be evaluated in isolation from its political and economic contexts since economic relations and power structures permeate everyday life (Bianchi, 2009 & 2018). Nonetheless, despite its importance, relatively few studies in tourism research are carried out from a political economy perspective. Political economy studies in tourism research have predominantly adopted a radical viewpoint based on dependency theory to examine the relationship between the core Northern-based large-scale tourism industry and Southern peripheral tourist destinations (Mosedale, 2011). Dependency theorists have been criticised for focussing on structural inequalities and ignoring dependency relationships at smaller spatial scales (e.g. Bianchi, 2015; Mosedale, 2011). To date, only a few tourism studies have applied dependency theory at smaller spatial scale (e.g. Chaperon & Bramwell, 2013; Lacher & Nepal, 2010). Further criticism relates to dependency theory being too deterministic - based on the assumption that tourism development inevitably leads to exploitation of peripheral areas by core areas (Chaperon & Bramwell, 2013). To avoid applying dependency ideas in an over-simplistic way, Chaperon and Bramwell (2013) suggest employing wider social science literature on agency-structure relations in research on dependency relationships. Similarly, other tourism scholars (e.g. Bianchi, 2009 & 2015; Lacher & Nepal, 2010) emphasise that since dependency theory alone cannot explain development patterns, it needs combining with other theories to evaluate internal conditions including internal power relations and conflicts among tourism stakeholders.

Dependency theory treats power as an underlying theme - without specifically conceptualising power (Church & Coles, 2007; Mosedale, 2011). Power is considered 'as given' in the structural dominance of the large-scale tourism industry, whilst agency, which influences and transforms these structures, is frequently ignored (Bianchi, 2018; Bianchi, 2015; Chaperon & Bramwell, 2013; Meyer, 2013; Bramwell, 2007). Thus, the importance of conducting research that incorporates both, power as structural domination and agents' capacity, in tourism research has been emphasised (e.g. Bramwell, 2015; Bramwell, 2007; Chaperon & Bramwell, 2013; Bramwell & Meyer, 2007; Erskine & Meyer, 2012; Meyer, 2013). The potential of Giddens' (1979, 1984) structuration theory has been pointed out; however, to date it has received little attention in tourism research (Bramwell, 2007; Erskine & Meyer, 2012).

Poverty and inequality are both complex concepts in nature that have been widely researched in social science (Spicker, 2007). However, despite their interrelationship, they tend to be treated separately rather than jointly in research (Naschold, 2002). To study each phenomenon, quantitative measurement has been predominantly applied, whilst qualitative approaches to explain and develop understanding have received limited attention (Lister, 2004; Spicker, 2007). Since quantitative measurement is considered inadequate in developing a full picture of poverty and inequality, combining quantitative with qualitative approaches, in particular through participatory research, has been widely advocated (Lister, 2004; White, 2002; Oya, 2015; Sumner, 2007).

Similarly, tourism research has a tendency *"to be narrowly focused on economic impacts"*, although the importance of taking broader perspectives on poverty has been emphasised (Spenceley & Meyer, 2012:300). Thus, tourism research fails to acknowledge the multidimensionality of poverty. Furthermore, tourism studies rarely explicitly refer to theoretical frameworks to develop understanding of the relationship between tourism and poverty reduction (e.g. Bianchi, 2009 & 2018; Bramwell, 2007;

Erskine & Meyer, 2012; Meyer, 2009; Scheyvens, 2011; Schilcher, 2007). A key theoretical framework about development is Sen's capability approach; however, despite its wide application in development studies, it has received limited attention in tourism research (Croes, 2012). To research poverty, applying qualitative approaches has been emphasised (e.g. Holden et al, 2011; Truong, et al., 2014; Truong, 2018). Truong et al. (2014) particularly stress the importance of applying participatory approaches, in that only by accessing people's perspectives on tourism and poverty, meaningful strategies for poverty reduction can be developed. Developing effective strategies also depends on the recognition of distributive issues; however, to date, tourism research on poverty reduction rarely incorporates analysis into the equal/ unequal distribution of tourism impacts (e.g. Bianchi, 2018; Truong et al., 2014).

The next chapter builds on the review of the literature and the identified research gaps. The chapter sets the identified theoretical gaps in context of this study, presents the conceptual framework and explains how the theories are applied in this study.

3. Conceptual thinking

3.1. Introduction

This chapter builds on the review of the literature and the identified research gaps (see: Chapter 2). It starts by briefly reviewing the identified research gaps and explaining how this study seeks to address these to deliver a contribution to knowledge. This is followed by presenting and explaining the study's conceptual framework in relation to how the main theories are applied to address the study's objectives. The chapter closes with a conclusion by pointing out the application of the study's main theories, and the intended contribution to knowledge in tourism research.

3.2. Research gaps and intended contribution to knowledge of this study

This study intends to address the research gaps identified in the literature related to the themes of poverty and inequality, political economy and power.

	Gaps in tourism research addressed in this study
Poverty and inequality	**Application of Sen's capability approach to develop understanding of multidimensional poverty and inequality** [e.g. Croes, 2012; Dorjsuren, 2014] **Connecting poverty analysis with the distribution of impacts** [e.g. Bianchi, 2017; Truong et al., 2014] **Qualitative and mixed-methods approaches to research multidimensional poverty and inequality** [e.g. Schilcher, 2007; Spenceley & Meyer, 2012; Truong et al., 2014]
Political economy	**Application of dependency theory to explore dependency relationships at smaller spatial scale** [e.g. Bianchi, 2015; Chaperon & Bramwell, 2013; Lacher & Nepal, 2010] **Application of dependency theory by drawing on wider sociel science theories** [e.g. Bianchi, 2017; Chaperon & Bramwell, 2013; Lacher & Nepal, 2010]
Power	**Application of Giddens' structuration theory to develop understanding of power as interplay between agents' transformative capacity and structural domination** [e.g. Bramwell, 2015; Bramwell & Meyer, 2007; Erskine & Meyer, 2012]

Table 3-a: Gaps in tourism research
Source: Author

Central to this study is the theme of poverty and inequality that is conceptualised using Sen's capability approach. Although the approach has become a key theoretical framework about development, it has been less frequently applied in tourism research (Croes, 2012; Dorjsuren, 2014). In applying Sen's capability approach, this study intends to broaden understanding of the multidimensionality of poverty in a tourism research context since it allows exploring what really matters to people (e.g. Lister, 2004). Accordingly, this research does not utilise a pre-defined list of capabilities; however, seeks to evaluate capabilities and explore how tourism contributes to achieving these from the perspectives of participants. Furthermore, by applying Sen's capability approach, this study combines poverty and inequality analyses which have rather been treated separately in tourism research (e.g. Bianchi, 2018; Truong et al., 2014) despite their interrelationship (e.g. Lister, 2004; McKay, 2002; Shildrick & Rucell, 2015; Sen, 1995a). To research poverty and inequality, this study uses a mixed-methods approach combining quantitative and qualitative methods - thus, this study seeks to move away from the quantitative methodological focus in tourism research to date (e.g. Schilcher, 2007; Spenceley & Meyer, 2012; Truong et al., 2014).

Sen's capability approach is applied in a broader sense by combining an evaluation of capabilities with an investigation into power relations in a political economy context (see: Section 2.3.2. Sen's capability approach). The need to take broader perspectives when evaluating capabilities by considering structural power as a constraint on people's agency and real opportunities has been pointed out (e.g. Robeyns, 2003). The political economy context in this study is analysed using Frank's dependency theory acknowledging that structural inequalities occur at different spatial scales (e.g. international, national, regional, local). Instead of solely focusing on exploring dependency relationships at international scale, this study seeks to extend knowledge and understanding of dependency relationships in tourism within and between spatial scales as requested by Bianchi (2015), Chaperon and Bramwell (2013) and Lacher and Nepal (2010).

To avoid applying dependency theory in a deterministic way that considers power as a given in the structural domination, this study draws on wider social science literature on agency-structure relations using Giddens' structuration theory. Giddens' structuration theory has had limited influence on tourism research to date despite its potential value (e.g. Bramwell & Meyer, 2007; Erskine & Meyer, 2012). Structuration theory proposes that agency and structure are in social relationship, which evolves over time and space (Giddens, 1979). Thus, in applying Giddens' structuration theory, this study seeks to compensate for the limitations of a 'purely' structuralist perspective with the aim of advancing knowledge on power as interplay between agents' transformative capacity and structural domination. Although Giddens' (1979) acknowledges the importance of 'space', he fails to incorporate spatial-inequalities and centre-periphery relations (Dell'Orto, 2002; Varien & Potter, 2008; Soja, 1989). To overcome this limitation, this study applies Frank's dependency theory that acknowledges the unevenness of development due to power relations at different spatial scale.

Giddens' structuration theory is perceived to *"fit well with Amartya Sen's capability approach to development"* (Gaventa, 2003:8). Giddens' and Sen's conception on human agency are alike, in that Giddens (1979:88) refers to transformative capacity as the *"agents' capabilities of reaching such outcomes"* and Sen (2002:586) describes it as the *"capacity of doing something worth doing or enjoying"*. Thus, Sen's capability approach and Giddens' structuration theory are linked in this study through the concept of human agency which is central to both.

The commonality of the three main theoretical approaches, Sen's capability approach, Frank's dependency theory and Giddens' structuration theory, is their (potential) usefulness in a development context. While Sen's capability approach and Frank's (international) dependency theory are commonly applied in development studies, the value of Giddens' structuration theory in providing insights in a development context has merely been emphasised rather than tested (Gaventa, 2003; Hustedde & Ganowicz, 2002). The three approaches are strongly relevant for this research as the study seeks to explore the relationship between tourism, poverty and inequality from a political economy perspective in a development context (see: Chapter 1. Introduction). Despite their strong relevance in a tourism development context, each approach/theory, Sen's capability approach, Giddens' structuration theory and Frank's dependency theory at different, particularly, smaller spatial scales, has been insufficiently utilised in tourism research. Furthermore, they have not been applied jointly to explore the relationship between tourism, poverty and inequality. In doing so i.e. applying these interrelated theories jointly, this study seeks to develop a clear contribution to knowledge in tourism research.

3.3. Conceptual framework

The study's conceptual framework (see: Figure 3-1) derived from having developed knowledge and understanding of the literature related to the study's key themes of poverty and inequality, political economy and power, and the identified gaps in a tourism research context.

In the centre of the conceptual framework, a pyramid is placed which represents poverty and inequality in a tourism context conceptualised by income, consumption and further valuable opportunities based on Sen's capability approach. Due the complexity and vagueness of Sen's capability approach, its practical application is faced with challenges (Atkinson, 1999; Chiappero-Martinetti, 2010; Hick, 2012; Lelli, 2010; Sugden, 1993; Townsend, 2006). Nonetheless, academics and practitioners agree that it can benefit poverty and inequality analyses (e.g. Comim, 2010; Hick, 2012). Although Sen refused to have a pre-defined list of capabilities and functionings (Hick, 2012), he acknowledged the importance of economic conditions by arguing that *"lack of income can be a principle reason for a person's capability deprivation"* (Sen, 1999:87). Therefore, undertaking an analysis of tourism-related income is a *"valid starting point"* for poverty analysis (Haughton & Khandker, 2009:1). This is mirrored in Objective 1 of this study.

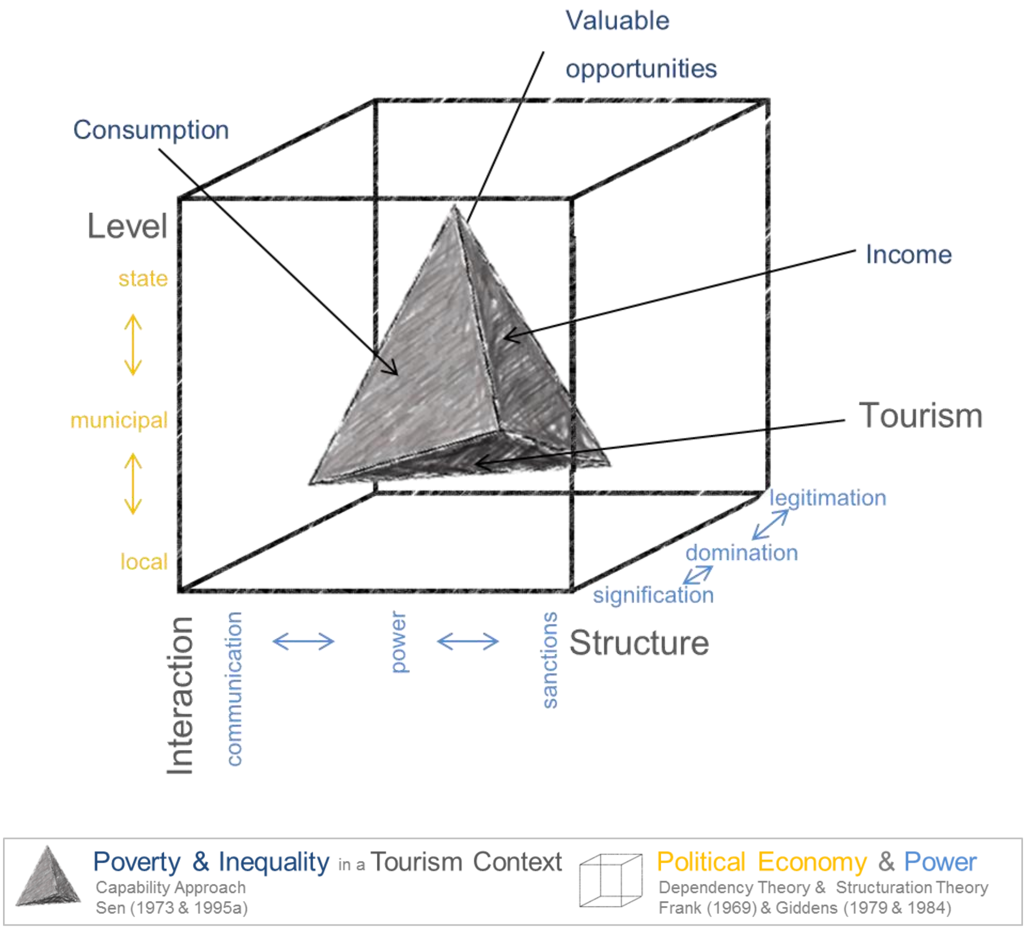

Figure 3-1: Conceptual framework
Source: Author

By Foster and Sen (1997:212) explaining that *"an older, or more disabled, or seriously ill person may need more income (for assistance, for prosthetics, for treatment) to achieve the same functionings (even when that achievement is at all possible)"*, the importance of moving beyond undertaking an income-analysis becomes evident. Furthermore, a 'pure' focus on income would *"overlook people's differing 'conversion factors' between income and functionings"* (Alkire & Santos, 2009:125). To respond to this requirement, this study incorporates an analysis of the value of tourism-related income via consumption for different socio-economic groups (Objective 2).

Comim (2010) puts forward that a comprehensive evaluation of valuable (real) opportunities is crucial. Instead of 'simply' selecting dimensions based on existing data (e.g. dimensions of the UN Human Development Index), theory or public consensus of what people do value or should value, a comprehensive evaluation of valuable (real) opportunities requires a participatory process *"including a strong role for participation of those being investigated"* (Comim, 2010:198). This study intends to examine valuable opportunities resulting from tourism for different socio-economic groups (Objective 3) by using a participatory approach. By examining tourism impacts for different socio-economic groups, the distribution of these among different groups is taken into account to explore inequality (Objectives 2 & 3).

The pyramid is placed in a cube to mirror the political economy perspective of this study on the relationship between tourism, poverty and inequality. The cube draws on the idea of the 'power cube' in mirroring the multidimensionality of power relationships (Gaventa, 2003), which are considered to surround and influence poverty and inequality in this study. However, in this study, the cube is distinct from the power cube in its dimensions being conceptualised using central ideas of Frank's dependency theory and Giddens' structuration theory. Giddens (1979) views power as 'structural domination' and 'transformative capacity', whilst not considering power as an action in itself; instead he describes power as an element of both, agency and structure, in that agency is defined by communication, power and sanctions and structure by signification, domination and legitimation. These elements are inextricably linked and occur in all social interactions (ibid).

In contrast, Frank (1969) considers power from Marxist' structuralist perspective which disapproves agents' capacity to intervene in events. However, despite their different views, both, Giddens (1979) and Frank (1969) consider power as a consequence of an unequal distribution of resources. Frank (1969) further links the unequal distribution of resources to spatial scales, whilst Giddens' fails to incorporate the spatial-inequalities. To incorporate the value of both theories, this study incorporates Giddens' understanding of power as transformative capacity and domination, and relates power relations to different spatial scales (state, municipal and local) using Frank's dependency theory. In doing so, this study seeks to investigate power relations and examine how they influence poverty and inequality (Objective 4).

3.4. Conclusion

This chapter set the identified gaps in tourism research related to the key themes of poverty and inequality, political economy and power in context of this study. Thereupon, the study's conceptual framework was presented and it was explained how the three main theories/approaches are applied to achieve the study's objectives and to address the identified research gaps.

To study poverty and inequality, Sen's capability approach is used conceptualising poverty as tourism-related income, consumption and further valuable opportunities - taking into account the distribution of tourism impacts among different socio-economic groups. By combining Sen's capability approach with an investigation into power relations based on Giddens' understanding of power, Sen's capability approach is applied in a broader sense. Giddens views power as agents' transformative capacity and structural domination occurring in any social interaction. As such, agency is defined by communication, power and sanctions, and structure by signification, domination and legitimation. Giddens' view on power is applied to evaluate dependency relationships at different spatial scales (state, municipal and local) as proposed by Frank (1969). In doing so, this study takes a more agency-centred approach to overcome the limitation of dependency theory in its deterministic assumption about the structural domination, and incorporates the notion of spatial scales to Giddens' structuration theory. By applying these interrelated theories jointly, the study seeks to develop a contribution to knowledge in tourism research.

The next chapter provides an overview of the research location, namely Brazil - particularly, pointing out tourism, poverty and inequality in Brazil's Northeast, and providing justifications for the chosen study location, Imbassaí, which is a coastal destination in the municipality of Mata de São João in the state of Bahia in Brazil's Northeast.

4. Research Location

"Why I love Brazil? The music, the beaches, the wildlife, and most importantly the people: it's hard not to fall for Brazil."
(Lonely Planet, 2016)

4.1. Introduction

This study about the relationship between tourism, poverty and inequality was conducted in Imbassaí - a coastal tourist destination in the municipality of Mata de São João in the state of Bahia in Brazil's Northeast. The chapter starts by setting the wider political economy context of this study by providing facts and figures, historical data and contemporary political, economic and social situation in Brazil. The chapter then moves on to providing insights into poverty and inequality, and tourism, to provide justification for choosing a study location in Brazil's Northeast. Thereupon, characteristics of the chosen study location are presented. This is followed by a review of existing tourism studies that focus on poverty and inequality, and power in (the Northeast of) Brazil to identify the current state of knowledge in tourism research. The chapter closes by drawing a conclusion on the role of tourism in the political economy context, and particularly, on the current state of knowledge in terms of tourism, poverty and inequality in Brazil to point out this study's potential contribution.

4.2. Brazil - the wider political economy context

Facts and figures

Brazil is located in South America – occupying almost 50% of the South American continent (Rocha, 1997). It borders with 10 South American countries and has a coastline of 7,367 kilometres (ibid). Having a size of 8.3 square-kilometres and a population of approximately 210 million, Brazil is the biggest country in South America and the 5th biggest in the world (Countrymeters, 2016). The country, governed from its capital Brasília, is divided in different regions (see: Figure 4-1).

The Brazilian Institute of Geography and Statistics (Instituto Brasileiro de Geografia e Estatística, IBGE) (2011) categorises the Brazilian population in five groups:

- Branco (48%) - White Brazilians with European Ancestry
- Pardo (43%) - Brazilians with a combination of European, Native, and African Ancestry
- Preto (8%) - Brazilians with African Ancestry
- Amarelo (1%) - Asian Brazilians

- Indigena (<1%) - Indigenous Brazilians

Skidmore (1992:3) explains that *"The question of accurate color terminology is especially difficult when discussing Brazil. The terms used in the Brazilian census—preto, pardo, and branco—translate literally as "black", "brown" and "white"".* He (1992) further points out that often the distinction is between 'white' and 'non-white', whilst the latter includes 'Preto' and 'Pardo'. For the purpose of this study, the terms/categories defined by the IBGE (2011) are utilised. Similarly, Bucciferro (2017) applies these terms to explore racial inequality in Brazil over time (from the colonial era to today).

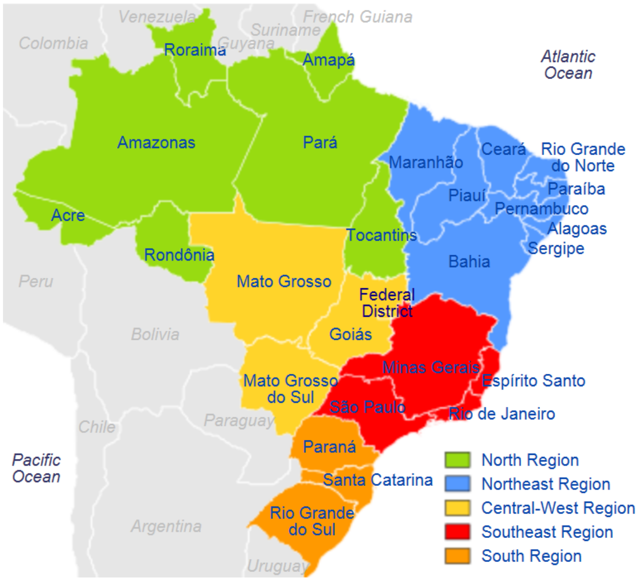

Figure 4-1: Brazilian Regions
Source: Wikipedia (2017) (labelled for reuse)

Colonized by Portugal in 1500, Brazil is the largest Portuguese-speaking population in the world and Catholicism is the dominant religion among Brazilians, representing approximately 65% of the population (CIA Factbook, 2019). However, Brazil has always been a country of immigration being influenced by different religions and practices (Fausto, 1999). Thus, Brazil is a country of a diverse population.

History - from colonial days to the end of the Military Regime

In 1500, Brazil was discovered when the Portuguese under the command of Pedro Alvares Cabral arrived and claimed the land to the Portuguese crown (Meyer, 2010). The Portuguese empire intended to monopolise the trade of pau-brasil (red wood) requiring a strong workforce, for which initially Indians 'were used' and later on African slaves were brought in (NYTimes, 2006). In order to strengthen the Portuguese power in Brazil internally and against external challenges with foreign countries seeking influence in Brazil, a capital was established in Salvador (Bahia) in 1549, which was moved to Rio de Janeiro in 1763 (ibid). By then, Brazil's economy had become strong in exporting wood, cotton, tobaccos, sugar, gold, and diamonds; however, instead of developing the economy, Portugal's policies focussed on *"stripping Brazil of its resources"* (NYTimes, 2006:online).

In 1822, the son of the Portuguese king declared Brazil's independence from Portugal (BBC, 2012). Thus, Brazil became a monarchy under the rule of Dom Pedro I and later of his son Dom Pedro II (Fausto, 1999). Following an economic and military crisis in 1889, the monarchy collapsed and the era of the so-called Old Republic started (ibid). The Old Republic was characterised by military dictatorship and lasted until the Brazilian Revolution in the 1930s that was led by Getúlio Vargas (Rocha, 1997). Vargas' 'new Brazil' was inspired by Italian Fascism and lasted, despite several uprisings, until the end of World War II (Rohter, 2012). In this era, Brazil's industrialization accelerated, particularly, due to the establishment of state companies (Rocha, 1997). In the Second Republic (from 1945-1964), the country underwent political changes as the three presidents introduced reforms to strengthen the government's role which were in favour of the public, but were not welcomed by military and international companies (Skidmore, 2009). Tensions accelerated and resulted in a military coup in 1964 (Fausto, 1999).

During the era of the new military regime (from 1964 onwards), economic development was in focus, in that not only domestic entrepreneurship and foreign investment was encouraged, but the regime itself was involved in large-scale development projects leading to Brazil's economic miracle in the 1970s (Skidmore, 2009). Rocha (1997:18) argues *"Brazil became the darling of foreign investors because of its 'economic miracle', averaging over ten per cent growth rates every year between 1968 and 1973".* However, Rohter (2012) points out that economic development took place at the expense of social justice, in that abuse of human rights, especially in the late 1960s and early 1970, occurred on a large-scale with political dissidents disappearing. At the end of the military government in Brazil (in 1985), the economy ranked 10th worldwide; however, Brazil stayed largely behind in terms of disparities in income, access to and quality of health care and education (Rocha, 1997; Rother, 2012)[8]. Rocha (1997:18) summarises the *"military regime left behind a more unequal, more corrupt society with weakened political institutions"*.

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[8] This is evidenced by Brazil's HDI (human development indicator) of 54.5% in the 1980s (The Global Economy, 2019a). In contrast, England's HDI was 73.5% in the 1980s (The Global Economy, 2019b). Further HDI-information and data for Brazil are provided in Section 4.3.1. Poverty and inequality.

Table 4-a provides an overview of the key dates in Brazil's history.

Colonial Days	1500	Brazil was claimed by the Portuguese
	1549	Salvador became capital
	1763	The capital was moved to Rio de Janeiro
The Empire and the Republic	1822	Brazil declared independence from Portugal and became a monarchy under the rule of Dom Pedro I & II
	1889	The monarchy collapsed and the so called 'Old Republic' was established
	1930	Brazilian Revolution' led by Getúlio Vargas took place
	1945	Vargas ousted in military coup and the so called 'Second Republic' was established (through elections held under caretaker government)
	1960	The capital was moved from Rio de Janeiro to Brasilia
Military Regime	1964	Following a military coup the Second Republic collapsed and a military regime was established
	1970s	The military regime pushed economic growth leading to Brazil's economic miracle
	1985	The military regime ended

Table 4-a: History of Brazil, timeline
Source: Author

Contemporary political, economic and social characteristics and issues

With the elections in 1985, a civilian government was restored in Brazil. After the new constitution was established[9], Fernando Collor (Party of the National Reconstruction,

[9] The Federal Republic of Brazil is a democratic state - built on the fundamental principles of sovereignty, citizenship, the dignity of the human person, the social values of labour and of the free enterprise, and political pluralism (Federal Constitution of Brazil, 2016). The multi-party system consists of several small parties and four main parties: Workers Party (PT), Brazilian Social Democracy Party (PSDB), Brazilian Democratic Movement Party (PMDB) and Democrats (DEM). Voting is compulsory for people between 18 and 70 - in case of violation, harsh fines are imposed. The division of power (executive, legislative and judicial) is formally established by the Constitution. The executive power is exercised by the President of the Republic - obtaining an absolute majority of votes and being elected for four years (with potential re-election in the following terms) (Federal Constitution of Brazil, 2016).

PRN) became Brazil's first directly elected president of the so called New Republic. He and his successors Itamar Franco (Brazilian Democratic Movement Party, PMDB) and Fernando Henrique Cardoso (Brazilian Social Democracy Party, PSDB) implemented major reforms to achieve political, economic and social stability; however, the re-democratisation of the country was proven to be difficult and was frequently endangered by unstable economic conditions as a result of high inflation combined with affairs of corruption.

<table>
<tr><td rowspan="7">Contemporary Events</td><td>1989</td><td>Fernando Collor de Mello became first directly-elected president since 1960</td></tr>
<tr><td>1994</td><td>Fernando Henrique Cardoso became Brazil's president</td></tr>
<tr><td>2002</td><td>Luiz Inacio Lula da Silva (Lula) won presidential elections to head left-wing government</td></tr>
<tr><td>2011</td><td>Left-wing government continued with the election of Dilma Rousseff as Brazil's first women president</td></tr>
<tr><td>2011</td><td>Government launched "Brasil Sem Miseria" (Brazil Without Poverty) welfare scheme, aimed at lifting millions out of extreme poverty</td></tr>
<tr><td>2013</td><td>Social unrest: people take action and demonstrate over corruption, high living cost and poor delivery of social services (whilst hosting the World Cup 2014)</td></tr>
<tr><td>2016</td><td>President Dilma Rousseff removed from office; Michael Temer is sworn in to serve the rest of her term to 1 January 2019</td></tr>
</table>

Table 4-b: Contemporary events, timeline
Source: Author

In 2002, with Luiz Inácio Lula da Silva (Workers' Party, PT) taking over presidential office, a *new* left-wing era started in Brazil. The PT vowed to be

> *"a different kind of party, eschewing Brazil's traditional clientelism, corruption, and corporatist interest-group politics. The PT called itself a class-based party, overtly committed to socialism and specifically to agrarian reform, participatory democracy, [and] redistribution of wealth"* (NACLA, 2011:online).

Building on Cardoso's reforms and following interventionist and expansionary economic policies, Lula made Brazil to become an important player in the global economy (NACLA, 2011) – moving from the state of developing country to emerging economy in line with Russia, India, China and South Africa (known as the BRICS). The BRICS-countries have been characterised by their fast economic growth, extensively expanding middle class combined with increasing domestic markets leading to the assumption that they have the potential to become 'best performing economies' by 2040 (Pop, 2014).

Brazil's GDP growth from US$ 507 billion in 2002 to US$ 2.6 trillion in 2011 (see: Figure 4-2) was largely driven by export of natural resources (OEC, 2016; Trading Economic, 2016; World Bank, 2018a).

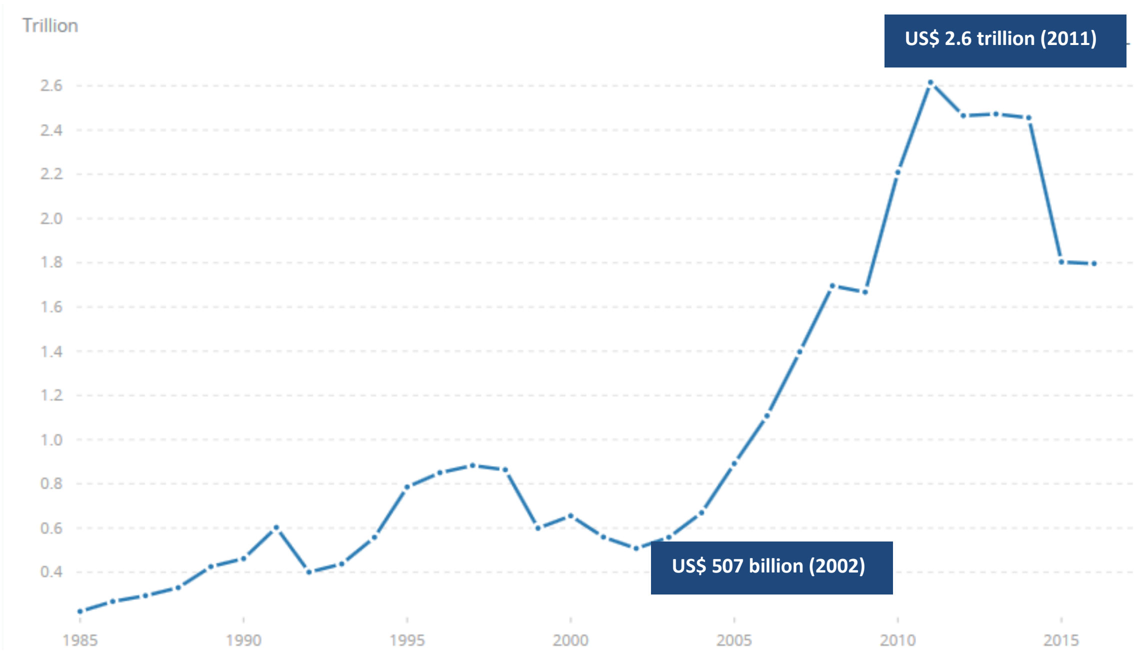

Figure 4-2: Brazil GDP, 1985-2016
Source: Author, based on World Bank, 2018a

Rohter (2012:141) argues that

> *"Brazil always had the potential to become an economic dynamo [...]. What was lacking until recently, however, was the political will, economic intelligence, and consistent policies required to put that enormous potential to work for the benefit of the Brazilians".*

Although Brazil 'put its potential to work' as evidenced in the GDP-growth, it can be questioned to what extent this economic growth works for the benefit of all Brazilians since inequality and poverty remain high (see: Section 4.3.1. Poverty and inequality).

In 2011, Dilma Rousseff became Brazil's first female president, who largely followed the footsteps of her predecessor by focussing on economic stability combined with job creation and poverty eradication, and human rights improvement (Ray & Wallenfeldt, 2017). Her presidency was characterised by constant accusations of corruption, economic downturn and persisting social issues e.g. high living cost, poor delivery of social services, which led to protests and unrest (ibid). In 2016, following an impeachment trial, Dilma was removed from office, which described the end of the left-wing era. However, since Michel Temer (Brazilian Democratic Movement Party, PMDB) runs office, neither the political nor the economic and social environment has been improving (Forbes, 2016); instead *"Brazil is still in its worst recession in history"* (CNN, 2017:online). In fact, Brazil's GDP fell to US$ 1.8 trillion in 2016, while inflation remained close to 8% p.a. (World Bank, 2018a). Nonetheless, despite a worsening of the situation, Brazil is still the largest economy in Latin America and the 9th largest in the world (World Bank, 2018a). Brazil has a strong service sector, followed by manufacturing, agriculture and food with each being driven from different regions (Duncan, 2013):

- The Northern economy is known for extraction of raw materials (e.g. iron ore), although delivering the smallest contribution to Brazil's GDP
- Originally, the Northeast was dominated by sugarcane production. However, extraction of raw materials (e.g. oil), agriculture and tourism[10] have become important sectors
- In the Centre-West commercial agriculture is dominating
- The Southeast is the most important industrial, commercial and financial region
- The South has a strong service and industrial sector; however, agriculture is increasing (e.g. soya beans).

In summary, Brazil's turbulent history continues until today. Although significant improvements were made, the political economy context is characterised by instability (CNN, 2017). This provides a unique context to study the relationship between tourism, poverty and inequality from a political economy perspective.

4.3. Brazil and its Northeast - poverty, inequality and tourism

4.3.1. Poverty and inequality

Poverty and inequality measured - a quantitative perspective

Extreme poverty has decreased dramatically in Brazil i.e. more than 20 million were lifted out of poverty since the 1990s; however, almost 10 million people (representing 5% of Brazil's population) still live below the international poverty line of US$1.90 per day (World Bank, 2017a). Applying Brazil's poverty line[11], more than 18 million people were considered poor in 2016 (ibid). Despite decreasing rates of extreme poverty,

[10] The importance of tourism is pointed out in Section 4.3.2. Importance of tourism.

[11] Brazil does not have an official poverty line. However, the administrative poverty lines defined for the Bolsa Familia program and the Brasil Sem Miseria plan of BR$140 (=EUR37.09/ GBP32.56) per capita per month (as of June 2011) are used (World Bank, 2017a).

inequality only changed marginally, so that Brazil remains one of the most unequal nations in the world (UN, 2013; UNDP, 2014; World Bank, 2017a). In 2001, Brazil had a Gini coefficient of 58.4 in terms of the distribution of household incomes per capita which was one of the highest levels of income inequality in the world (World Bank, 2018b). Fourteen years later, the Gini coefficient of 51.3 is still on a high level (World Bank, 2018b). Mendez (2014:75) points out that there has been a tradition of inequality in Brazil by arguing that

> *"In Brazil, the engineer's son will be born in a private hospital, paid for by a private health plan, go to a private school and, most of the time, travel by car. The carpenter's son will probably be born in a public hospital, attend public school and use public transportation, all of lesser quality than his private counterpart. They live and grow up in parallel worlds. They may live in the same city, but usually go to different places in their leisure time. The engineer's son will probably do better in his studies and get a higher paying job than the carpenter's son. This inequality carries on from one generation to the next".*

The latest research brief on poverty in Brazil by the International Policy Centre for Inclusive Growth (IPCIG, 2016), supported by the United Nations Development Programme and the Government of Brazil, provides insight into poverty ratios related to geographical areas (based on data until 2013).[12] The report (IPCIG, 2016:1) points out that

> *"The reduction in poverty has not been accompanied by changes in its principal characteristics or profile. There has been little change at the regional level: the North and Northeast regions still demonstrate the highest rates of poverty (as do rural areas in all regions)".*

It is identified that, while most Brazilian municipalities have a poverty rate below 15%[13], many municipalities in the North and Northeast have poverty rates higher than 60%, sometimes up to 90% (ibid). Poverty does not only persist in specific regions, but also among racial groups, in that poverty rates among Afro-Brazilians are double of those of white Brazilians (Pereira, 2016). Pereira (2016) concludes that despite

[12] Current World Bank data on poverty ratios related to the type of area (e.g. rural, urban), size of households and level of education is not available for Brazil (World Bank, 2017a).

[13] using the poverty line of 2011 (see: footnote 8)

reducing overall poverty, the racial division in Brazil between whites and non-whites[14] remains considerable. Similarly, Bucciferro (2017:191) attests that the situation of non-white people *"is better than it was a few decades ago, and race has become imbued with pride; yet progress has been irregular and opportunity remains far from equal".*

Brazil significantly accelerated development evidenced by an increase of the 'human development value' (HDI-value) by more than 20% between 1990 and 2016 (UNDP, 2017). With a HDI-score of 0.754, Brazil is now ranked 79th and listed in the category of high human development (UNDP, 2015). Analysing the three dimensions of the HDI, health (expressed in life expectancy at birth), education (expressed in years of schooling) and standard of living (expressed in GNI, gross national income, per capita), improvements in all dimensions are evident (see: Table 4-c).

Year	HDI	Life expectancy at birth	Expected years of schooling	GNI* per capita (2011 PPP$)
1990	0.611	65.3	12.2	10,746
1995	0.649	67.6	13.2	11,238
2000	0.685	70.1	14.3	11,339
2005	0.698	71.9	13.8	12,117
2010	0.724	73.3	14.0	14,173
2015	0.754	74.7	15.2	14,145

Table 4-c: Trends in Brazil's HDI dimensions 1990-2015
Source: Author, based on UNDP, 2017

The 'inequality-adjusted human development index' (IHDI) combines a country's achievements in health, education and standard of living with their distribution among the population by discounting the level of inequality from the value of each dimension (UN, 2018a). Thus, the difference between HDI and IHDI is the cost of inequality, also described as the 'loss to human development' due to inequality (ibid). In Brazil, the loss of human development is equal to 25% (UNDP, 2017)[15]. This means that, for example, 'years of schooling' varies in relation to income class i.e. children of poor-income

[14] 'Non-white' refers to Pardo (Brazilians with a combination of European, Native, and African Ancestry) and Preto (Brazilians with African Ancestry)
[15] The average loss for high HDI countries is 20% and for Latin America and the Caribbean 23.4% (UNDP, 2017).

households tend to have significant less years of schooling (app. 5 years) than children of upper class households (approximately 14 years) (Ferreira, Messina, Rigolini, López-Calva, Lugo & Vakis, 2013).

In summary, the data shows a 'promising' picture for Brazil as a whole; however, once taking a deeper look, significant differences among households, geographical areas and races become evident - which was emphasised by Hochstetler's (2010:5) quote

> *"whether the indicator is inequality, income level and depth of poverty, education, life expectancy, or practically any other known measure of development and well-being, the same Brazilians are still clustered in the lowest categories: those of are rural, dark-skinned, and/ or in the North and Northeastern regions of the country".*

Poverty and inequality explained - a qualitative perspective

The World Bank study (Narayan, 1999) 'Voices of the poor' includes voices from Brazil. These voices show that poverty is a multidimensional phenomenon i.e. people do not feel poor because they lack one thing, but from a combination of factors as one Brazilian participant explains *"It's the cost of living, low salaries, and lack of jobs. And it's also not having medicine, food and clothes"* (Brazil, 1995 in: Narayan, 1999:29). However, poverty goes beyond lack of material needs, in that it influences psychological well-being. A Brazilian stating that *"The poor person has to exist so he can serve the great one, the rich. God made things like that."* (Brazil, 1995 in: Narayan, 1999:31) expresses a strong feeling of inferiority combined with hopelessness to escape poverty. The feeling of hopelessness is also confirmed by another quote *"I think poverty is something that begins at birth. Some people are unlucky from the day they're born. They'll never go anywhere in the world"* (Brazil, 1995 in: Narayan, 1999:34). Both quotes provide understanding of how people experience a tradition of inequality, or more specific, of unequal opportunities. 'Being poor' is described as 'being unhappy' and not having any opportunity to move away from this life.

This feeling of powerlessness seems to be connected with poverty - as one participant reports *"The poor are those who suffer. Because in our country there are resources. The authorities don't seem to see poor people. Everything about the poor is despised, and above all poverty is despised"* (Brazil, 1995 in: Narayan, 1999:219). The person indicates that 'the powerful' (i.e. authorities) make use of resources, whilst not seeking to improve the livelihoods of the poor. In this context, a study by Silva and Lopez (2015) that explores perceptions of Brazilian elites towards the poor provides interesting insight: while a sense of community (we, the people) among Brazilian people was identified, it was also found that there was also the notion of 'the others', which strongly conflates with the poor. They (ibid) conclude that to understand poverty, it is crucial to examine the role of social distance between elites and the wider population.

Studies, that address the multidimensionality of poverty through qualitative research in Brazil, are limited (Pengo Bangolin & Peres de Ávila, 2006). Furthermore, Pengo Bangolin and Peres de Ávila (2006:2) point out that the *"diversity and complexity involved in poverty analysis, is not only frequently left aside, but it is also not properly understood. Very often, poverty in Brazil is seen as a derived problem from the chronic income inequality"* and assert that there is

> *"the need to go further and to deepen the knowledge about the different characteristics of poverty. In other words, even the Brazilian studies that conceptually accept and understand poverty as a multidimensional phenomenon end up evaluating only the income perspective".*

Weinhold et al. (2013) utilise a mixed-methods approach to examine socio-economic costs and benefits of soybean production the Brazilian Amazon. Based on the quantitative data, the study (ibid) argues that soy production reduced poverty, but increased income inequality. Using qualitative ethnographic work, the study (ibid) provides further insight into political tensions related to soy production, in that people perceive an unequal distribution of benefits among different racial groups with long-lasting tensions. In particular, it was emphasised that locals had difficulties in growing soy, whereas financially-strong migrants from the South have been more successful. They (2013:143) conclude that *"qualitative analysis provided a much more nuanced and informative characterization of the nature of the inequality, pointing to ethnic differences between large soy farmers and local populations that raise long standing prejudices and tensions".*

4.3.2. Importance of tourism

Tourism in Brazil

With the first Tourism Policy in Brazil (Decree-Law No. 55/66 of November, 1966), the Brazilian Company of Tourism (EMBRATUR) and the National Council of Tourism (CNTUR) were established (Cruz, 2000). Both underwent significant changes during the process of re-democratisation from 1985 onwards: while CNTUR was abolished, EMBRATUR was transformed into a federal governmental institution directly linked to the Ministry of Sport and Tourism and responsible for developing tourism policies (Vilela de Almeida, 2011; Trentin & Fratucci, 2013). The establishment of EMBRATUR (Law No. 8,181 of March, 1991) and the National Tourism Policy (Decree-Law No. 448 of February, 1991) marked a change in Brazilian tourism policy and planning (Cruz, 2005), in that tourism was acknowledged as a tool for development. In specific, the

Policy aimed at *"the development of tourism and its consideration as a national source of income"* and further highlighted the *"the practice of tourism as a means of promoting appreciation and preservation of the country's natural and cultural heritage"* and *"the consideration of society as the final beneficiary of touristic development"* (Brasil, 1992 in: Carvalho, 2016:91).

In 1992, EMBRATUR launched its first National Tourism Plan which reinforced tourism as a tool for regional development (Trentin & Fratucci, 2013). Tourism became a key strategy for development in Brazil; however, although many actions, particularly focused on social tourism to enable wider socio-economic groups to travel, were proposed, they were not put in practice due to the country's political instability (Vilela de Almeida, 2011). Bartholo et al. (2008:108) argue that *"the plan barely got off the ground. Its only concrete result was the Programa de Ação para o Desenvolvimento do Turismo no Nordeste Brasileiro (National Programme for Developing Tourism in the Brazilian Northeast-PRODETUR-NE)"* (see: Tourism in Brazil's Northeast in this Section).

From 2002 onwards, tourism became *"one of the ten priorities of his [=Lula's] administration"* (MTUr, 2005 in: Carvalho, 2016:93), which is particularly evidenced by the Ministry of Tourism (MTur) being established (as per Law No. 10,683 of May, 2003) (Carvalho, 2016). The Tourism National Plan 2003-2007 focussed on generating foreign exchange, reducing regional inequality and improve income distribution (MTur, 2003:3). To achieve this, a new model of tourism development through decentralised management and partnership was proposed (SETUR, 2011; Trentin & Fratucci, 2013). Based on this model, municipalities were encouraged to form partnerships involving a range of stakeholders (private, public at different levels, teaching institutions) to develop tourism products. The model proved to be successful with initially 219 tourist regions being formed by 3,319 municipalities (Carvalho, 2016), which were reduced to 116 since only these were considered to have the quality required (Trentin & Fratucci, 2013).

During the first two years of Dilma Rousseff's presidency, a National Tourism Plan was absent (Carvalho, 2016). The latest National Tourism Plan 2013-2016 (Plano Nacional de Turismo, PNT) presented tourism as crucial for Brazil's economic development, which was demonstrated by the country's vision to become one of the three major tourist economies in the world by 2022 in the WTTC ranking (Ministry of Tourism (MTur, 2013). To achieve this vision, the national tourism plan included four main strategic objectives (MTur, 2013):

(1) to prepare Brazilian tourism for the mega-events;
(2) to increase generation of foreign exchange and arrival of foreign tourists;

(3) to encourage domestic travel and
(4) to improve the quality and increase the competitiveness of Brazilian tourism.

The mega-events, the World Cup 2014 and the Olympics 2016, were hosted successfully and in particular, the World Cup 2014 attracted a significant number of international tourists - thus, contributed to foreign exchange generation.

Characteristic	International tourist (2011-2015)	Domestic tourist (2010)
Origin	**South America (55%) -** Argentina, Chile, Paraguay **Europe (26%)** **North America (12%)** **Other (7%)**	*details not available*
Travel reason	**Leisure (50%)** - Sun & Beach (70%), Nature & Adventure (16%), Culture (12%), Other (2%) **VFR (25%)** **Business & Events (20%)** **Other (5%)**	*details not available*
Main type of booking	**Independent (80%)**	**Independent (>90%)**
Main destination	**São Paulo** **Rio de Janeiro**	**Northeast**
Average length	**15 days**	**9 days**
Accommodation preferences	**Hotel, flat, pousada, resort**	**Family & friends, 1-3* hotel and pousada**
Average spending	**US$ 56/ day**	**US$ 39/ day**
Main travel season	**December to February**	

Table 4-d: Characteristics of tourists
Source: Author, based on Mtur, 2016 and Mtur, 2012

In 2014, 6 million international tourists visited Brazil representing an increase of approximately 10% to the previous year (WTTC, 2015). Equally, domestic travel experienced an increase amounting to more than 90 million tourists (WTTC, 2017). As a result, media declared that the Brazilian tourism industry is experiencing a 'golden decade'.

However, since 2015, international and domestic tourist numbers and expenditure have been declining (WTTC, 2017). Although being blessed with rich natural and cultural resources combined with a relatively good tourist service infrastructure, the politico-economic environment (e.g. inefficiency in the legal system, high taxes, and corruption) and social issues (e.g. insecurity) have been worsening which led to a decline of the country's competitiveness in comparison to other destinations (Travel and Tourism Competitiveness Report, 2017). In addition, the Brazilian tourism industry has recently received less support from the government, with little investment and marketing activities taking place (ibid), which might indicate decreasing interest in tourism as an economic activity among government institutions. This is supported by the fact that the national tourism plan 2013-2016[16] has not been updated yet. In light of the current political and economic situation, Aldrigui (2017:206) believes that there is *"no bright future for national tourism policy in Brazil"*.

Nonetheless, in 2016, Brazil was still ranked 11th worldwide in terms of tourism's absolute contribution to GDP in 2016 by the WTTC (2017). 87% of the industry's GDP is generated from sun, sea and sand tourism, which emphasises the importance of the leisure market (WTTC, 2017). Domestic tourism is vital since 93.5% of the industry's GDP is generated from domestic spending (ibid). The absolute contribution of US$ 152.2 billion to GDP reflects 8.5% of the country's economic activity and the total contribution of tourism to employment is 7.8% which equals 7,003,000 jobs (ibid). Despite Brazil's current political and economic fragility, the economic impact of tourism is forecast to rise in the forthcoming 10 years in line with the Latin American average (WTTC, 2017).

Tourism in Brazil's Northeast

Brazil is one of the world's long-standing top tourist destinations with tourism traditionally being concentrated on a few urban areas such as Rio de Janeiro and São Paulo (Lohman & Dredge, 2012). However, since the Brazilian government employed

[16] The latest plan focussed on tourism development from 2013 to 2016. According to EMBRATUR, a national tourism plan is in progress; however, has not been published.

tourism as a tool to draw the northern regions out of economic backwardness and promote social and equitable development, tourism has expanded to these areas that were traditionally not on the list of travellers (Oliveira, 2003; Pegas et al., 2015; Siegel & Alwang, 2005).

In more detail: in 1992, the Brazilian government in cooperation with local governments, international and domestic financial institutions (i.e. the Inter-American Development Bank (IADB) and Banco do Nordeste do Brasil (BNB)) and tourism agencies launched an extensive tourism-related investment program in the Northeast, called PRODETUR-NE (Programa de Desenvolvimento do Turismo) (Siegel & Alwang, 2005). The key objective was to reduce poverty through employment in tourism, and realising wider economic, social and environmental objectives (e.g. transport, sanitation, education, conservation) by using domestic tourism as a tool for transferring wealth from the richer South to the poorer North (Pegas et al., 2015; Siegel & Alwang, 2005). Focussing on mass tourism development along the coastline in the Northeast, the first stage (from 1994-2004) included an investment of approximately US$ 700 million, which was distributed to economically deprived areas with tourism potential (IADB, 2017; Pegas et al, 2015). The second stage, PRODETUR-NE II, included investments of approximately US$ 400 million and was completed in 2014 (IADB, 2017).

Today, 60% of the 195 coastal destinations with sun, sea and sand image are located in the Northeast (Pegas et al., 2015). For example, from 2006 to 2012, the Northeast received approximately 80% of total private sector investment, resulting in 78% of total hotel rooms available and 88% of direct employment (BSH International, 2008, 2011 in: Pegas et al., 2015). Whilst most private sector investment originated domestically, international investors from Spain and Portugal have become attracted to the Northeast (ibid). For example, traditionally, the accommodation sector was dominated by national hotel chains (e.g. Blue Tree Hotel, Pestana, Othon); however, international chains from Spain and Portugal have entered the market resulting in increasing offers and declining prices in the Northeast (BMI, 2015; Travel and Tourism Competiveness Report, 2017).

Consequently, sun, sea and sand tourism in Brazil's Northeast has been growing rapidly[17] (Fennel, 2008). Tourism has become the most important economic sector in the Northeast (Duncan, 2013) and is an important source of income for coastal

[17] Specific tourist data for the Northeast is not available

communities in the Northeast, particularly in the municipality of Mata de São João (in the state of Bahia), where more than 50% of the population work in tourism (IBGE, 2011 in: Pegas et al., 2015)[18].

4.3.3. Studying tourism, poverty and inequality in Brazil's Northeast - a justification

A strong domestic market is a key characteristic of Brazil's tourism industry. Research on the impacts of domestic tourism is scarce as Pegas et al. (2015:750) state that *"Absent from the literature are situations where such mainly domestic impulses influence pleasure periphery development in emerging economies".* Furthermore, the leisure market is dominant in Brazil - particularly, sun, sea and sand tourism in Brazil's Northeast (Fennel, 2008). Tourism has become the most important economic sector and source of income for coastal communities in the Northeast (Duncan, 2013; Pegas et al., 2015). However, to date *"little is known about the structure and sustainability"* of sun, sea and sand tourism in that region, which is also described as Brazil's northern littoral pleasure periphery (LPP) (Pegas et al., 2015:750). They (2015:763) add that there is *"lack of literature, in any language, on broader analyses of coastal tourism sustainability in Brazil"*.

Although tourism in Brazil's Northeast has been growing rapidly, the Northeast is still faced with poverty and inequality (as explained earlier). In that regard, Neri and Soares (2012:868) point out that

> *"The Brazilian case, especially in the country's northeast, is a good example when thinking about sustainability and poverty relief. It has an enormous potential for tourism, albeit little explored, combined with high inequality and poverty if compared to the rest of the country".*

Thus, conducting research in Brazil's Northeast provides a good opportunity to study the relationship between tourism, poverty and inequality. Poverty and inequality in the Brazilian context have predominantly been studied from a quantitative perspective - requiring research that seeks to deepen knowledge of (multidimensional) poverty and inequality in this context. Pegas et al. (2015:763) particularly emphasise that more qualitative research with *"residents at the case study level"* is crucial to evaluate how sun, sea and sand tourism in the Northeast influence *"patterns on quality of life"*.

[18] The percentage for Imbassaí is likely to be higher since the municipality extends into the interior, whilst tourism development is concentrated on the coastline.

In summary, the Northeast of Brazil is a useful destination to study the relationship between tourism, poverty and inequality as the region experienced extensive tourism growth and tourism is the most important economic sector, whilst, at the same time, poverty and inequality continue to persist, particularly among different races. Additionally, to date little is known about the impacts of domestic tourism and the impacts of tourism on (multidimensional) poverty and inequality in coastal regions in Brazil's Northeast. Therefore, studying the relationship between tourism, poverty and inequality in Brazil's Northeast also provides the opportunity to develop a contribution to knowledge.

4.4. Study location in Brazil's Northeast: Imbassaí

To study the relationship between tourism, poverty and inequality from a political economy perspective, the location of Imbassaí, which is a small coastal tourist destination in the municipality of Mata de São João in the state of Bahia in the Northeast of Brazil, was chosen (see: Figure 4-3).

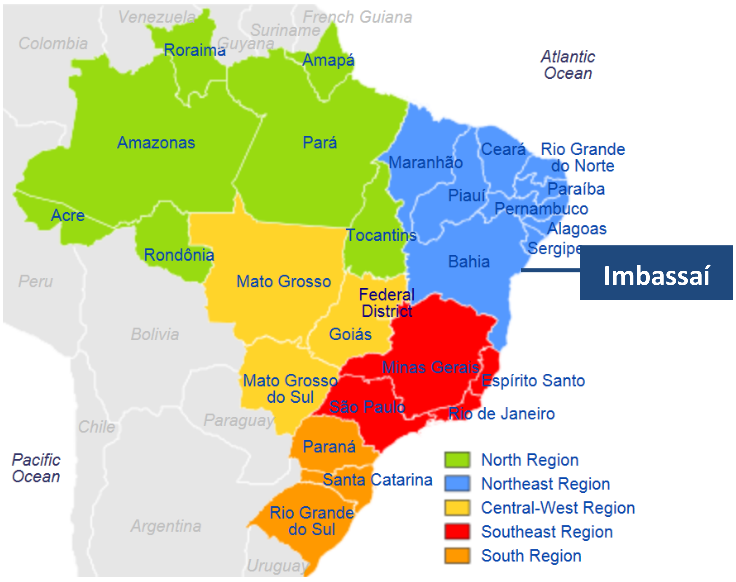

Figure 4-3: Study location

Source: Author, adapted from Wikipedia (2017) (labelled for reuse)

A key reason for choosing the study location, Imbassaí, was the researcher's access and familiarity with the destination. The researcher lived for six months in Brazil in 2005, travelled several times to Imbassaí afterwards and had an established network of contacts in the destination.

Tourism is the key economic activity in the municipality (Mata de São João, 2015). The Department of Culture & Tourism ('Secretaria Municipal de Cultura e Turismo') of the municipal government 'Prefeitura' is responsible for developing tourism in a sustainable way, which involves:

- generating jobs and income enabling social inclusion,
- enhancing the overall quality of tourism development and,
- developing tourism products and services and support marketing activities including communication of tourism products and services nationally and internationally (Mata de São João, 2019).

Accordingly, tourism is viewed as a means for social inclusion of marginalised groups (Mata de São João, 2019); however, this is not acknowledged in the objectives of the Department of Social Affairs as tool for inclusion and poverty reduction ('Secretaria Municipal de Ação Social') (ibid). In terms of the development of tourism as an economic activity, the 'Secretaria Municipal de Cultura e Turismo' works closely with the Department of Planning, Environment, Employment and Development ('Secretaria Municipal de Planejamento, Meio Ambiente, Trabalho e Desenvolvimento') (ibid).

Imbassaí is promoted as part of the tourist region Costa dos Coqueiros - which is one of 13 tourist regions in the state of Bahia (SETUR, 2011) (see: Figure 4-4).

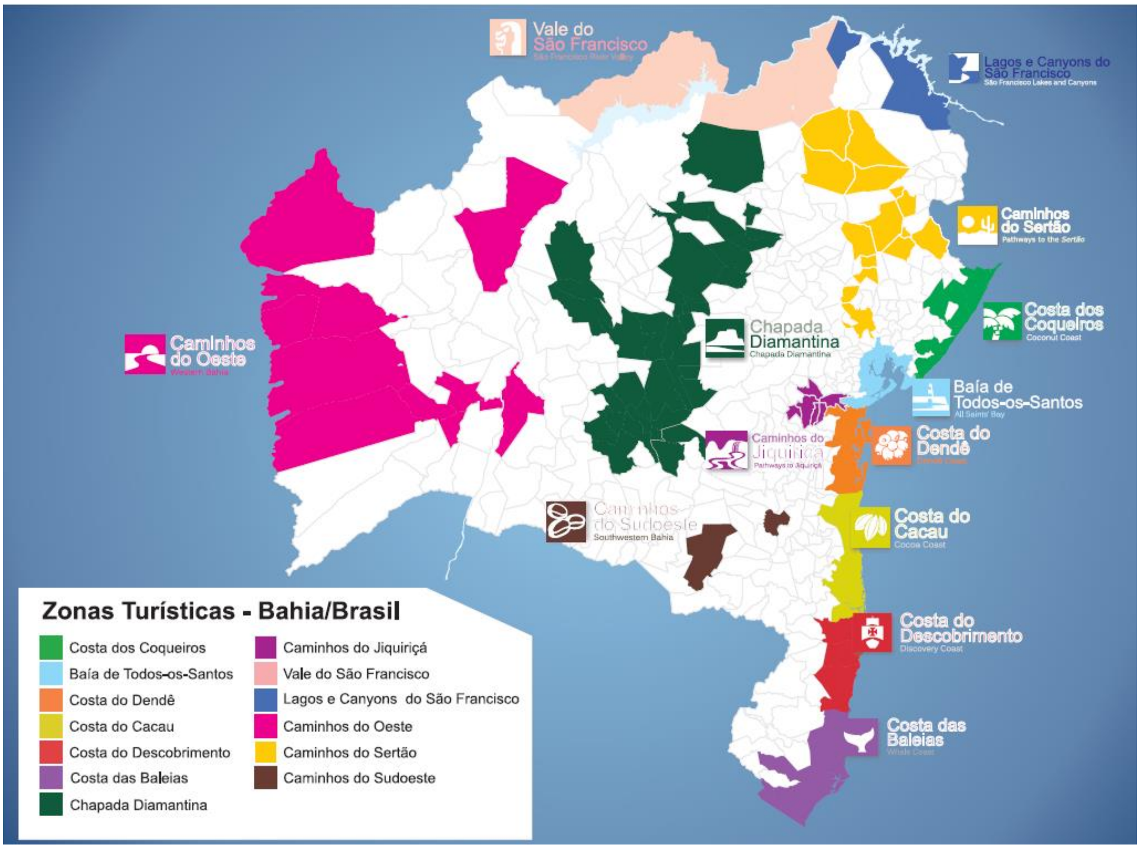

Figure 4-4: Tourist regions in Bahia
Source: SETUR, 2011:45

The latest strategy 'Plano de Desenvolvimento Integrado do Turismo Sustentável' for developing sustainable tourism in the region emphasises the role of tourism in reducing poverty, particularly through providing access to education and employment (SETUR, 2015). Poverty has been significantly reduced; however, it still remains *"a reality for the region"* (SETUR, 2015:13). The whole region benefitted hugely from PRODETUR-investment, in particular improvements in road infrastructure, which made the region more accessible, so that is has become famous among domestic Brazilian travellers (Pegas et al., 2015).

In 2008, 9 million tourist arrivals were registered in Bahia with 95% of being domestic travellers (Observatorio de Turismo da Bahia, 2017). In 2014, Bahia received approximately 14.5 million tourists (95% being domestic tourists) - which shows the extensive growth of tourism in Bahia (ibid). The number of domestic travellers in the tourist region Costa dos Coqueiros increased from 450,000 in 2008 to 1.26 million in 2011 (ibid). Domestic tourists come mainly from Bahia (55%), followed by 'Paulistas' (São Paulo) (14%) and 'Mineiros' (Minas Gerais) (7%) and international tourists from Argentina (25%), France (11%) and United States (8%) (ibid). The main travel reasons are 'Visiting-Friends-&-Relatives' (VFR) (for domestic tourists) and 'Leisure' (for international tourists) (ibid).[19]

The latest tourism strategy for Bahia 2007-2016 (Estratégia Turistico da Bahia) (SETUR, 2011a) expressed the importance of tourism as an economic sector for the state of Bahia. The Bahian state government intended to improve tourist experiences, to strengthen involvement of local communities, to protect the natural and cultural heritage and to set an example for sustainable development (ibid). Located in Bahia, and more specifically, in the municipality of Mata de São João, tourism is the main economic sector and the key source of income for the population in Imbassaí. Imbassaí mainly attracts domestic sun, sea and sand travellers who either stay in large-scale hotel and resorts or in the typical Brazilian pousadas[20].

Figure 4-5 shows a tourist map of Imbassaí highlighting its main attraction 'the beach' and identifying the location of different tourism businesses (accommodation, food and drinks).

[19] Overall data on tourist demand and supply in Bahia is fragmented and outdated.
[20] comparable to Bed & Breakfast

● Accommodation (i.e. pousada, hotel) ● Food & drinks (restaurants, bars)

Figure 4-5: Tourist map
Source: Mata de São João, 2017

Detailed characteristics and statistics of tourism supply and demand for Imbassaí could not be identified - potentially due to the small size of the destination, such data is not collected[21].

4.5. Tourism research in Brazil's Northeast - the current state of knowledge

Tourism, poverty and inequality

Tourism research focusing on poverty and inequality in the Brazilian context tend to apply a quantitative approach (see: Table 4-e). Three of these studies focus on the macro-level (Blake et al., 2008; Haddad, Porsse & Rabahy, 2013; Ribeiro, Da Silva, Andrade & De Souza, 2017) and further three are situated in Brazil's Northeast (Neri & Soares, 2012; Siegel & Alwang, 2005; Wagner, 1997). Blake et al. (2008) estimate that tourism benefits the lowest-income households of the Brazilian society; however, higher income household are greater beneficiaries from tourism. They (ibid) suggest

[21] Even at higher level (municipal, state), there is only limited data available.

redistributive policies so that the poorest of the society achieve greater gains from tourism. Haddad et al.'s (2013) study indicates that domestic tourism reduces regional income-inequality in Brazil with the poorer Northeast region gaining from domestic tourist expenditure and the richer Southeast region providing most income transfers. Ribeiro et al. (2017:725) conclude that *"tourism has shown positive impacts in the Brazilian Northeast"* since tourist spending was responsible for an increase in the Northeast's GDP and contributed to reducing regional inequalities.

Study	Case study	Approach	Method
Blake, A., Arbache, J., Sinclair, M., Teles, V. (2008). Tourism and Poverty Relief.	Brazil	Quantitative	CGE (computable general equilibrium) model
Haddad, E. Porsse, A., Rabahy, W. (2013). Domestic tourism and regional inequality in Brazil.	Brazil	Quantitative	Input-output model
Neri, M., Soares, W. (2012). Sustainable Tourism and Eradication of Poverty (Step): impact assessment of a tourism development program in Brazil.	Porto Seguro, Bahia Northeast of Brazil	Quantitative	Difference in difference technique
Ribeiro, L., Silva, E., Andrade, J., Souza, K. (2017). Tourism and regional development in the Brazilian Northeast.	Brazil	Quantitative	Input-output model
Siegel, P., Alwang, J. (2005). Public Investments in Tourism in Northeast Brazil: Does a Poor-area Strategy Benefit the Poor?.	Rio Grande do Norte Northeast of Brazil	Quantitative	Survey
Wager, J. (1997). Estimating the economic impacts of tourism.	Guaraquecaba, Paraná Northeast of Brazil	Quantitative	SAM (social accounting matrix) model

Table 4-e: Tourism research on poverty and inequality in the Brazilian context
Source: Author

Seeking to evaluate the success of PRODETUR-NE, Neri and Soares (2012) use the town of Porto Seguro in the northeastern state of Bahia as a case study and find that tourism impacts positively on employment, income and poverty. Their study (ibid) shows that benefits are unevenly distributed between natives and migrants, in that natives are in a better position of being employed than migrants. When taking wider social dimensions of poverty into account, it is analysed that access to water, the sewage system and waste collection is still limited (ibid). They (2012:876) conclude that *"the potential of tourism to alleviate poverty will directly depend on the adoption of principles and actions that place the excluded groups as agents"*.

Siegel and Alwang (2005), assessing the success of PRODETUR-NE in the state of Rio Grande do North, identify an implementation gap, in that program objectives and achievements deviate. Concerning the program's key objective of poverty reduction, stakeholders do not view the program to have had a major impact on reducing poverty (ibid). Stakeholders suggest that in order to improve the impact on the poor, investment needs to be allocated into developing human resources rather than infrastructure (ibid). Wagner (1997) argues that tourism generates a significant number of jobs that enable locals to generate income - thus, having a direct impact on households. On the other side, however, most input (commodities and capital) is sourced outside the region, so that economic impact of tourist spending is small (ibid).
Tourism research that explores poverty and inequality from a qualitative (or: mixed-methodological perspective) in a Brazilian context, particularly, in the Northeast of Brazil, could not be identified.

Further tourism research areas in relation to Brazil's Northeast, that are to some extent connected to the key themes of this study and therefore highlighted, are 'Tourism Policy and Planning' (e.g. Araujo & Dredge, 2012; Araujo & Bramwell, 2002; Araujo & Bramwell, 1999), 'Sustainable Tourism Development' (e.g. Pegas et al., 2015), 'Tourism and Culture' (e.g. Grünewald, 2012), 'Tourism and Environmental Conservation' (e.g. Pegas, 2012) and 'Sex Tourism' (e.g. Piscitelli, 2007; Williams, 2014; Williams, 2013)[22].

Power relations in tourism

Only one study that explores power relations in tourism in Brazil's Northeast was identified. Using discourse analysis, Calvo-Gonzales and Duccini (2010) explore how the understanding of 'Blackness'[23] has been changing (in Salvador, Bahia) and how this shapes and reflects legitimacy and power of different groups. They (ibid) explain that

[22] Although 'slum (favela) tourism' has emerged as a research area and is associated with Brazil, it has not been explored in the context of Brazil's Northeast.
[23] 'Blackness' is used as a term by Calvo-Gonzales and Duccini (2010).

since the beginning of the 20th century, Bahia's image and identity have been created around the notion of being the 'Black state' in Brazil - which is reflected in tourism and culture policies that intended to make the Blackness more visible and interesting to attract domestic and international tourists. As a consequence, *"everyday life became carefully crafted to include certain things and exclude other, to promote the image of Bahia as a 'Black Rome', as a centre of 'Africanness' within the Brazilian nation"* (Calvo-Gonzales & Duccini, 2010:149). This leads to tensions, in that, on the one hand, popular culture, that is considered to support the image of Blackness, is preserved, because it is seen as authentic; on the other hand, culture, that does not mirror the 'crafted Blackness' i.e. carefully constructed and politically legitimised Blackness, is seen as unauthentic and becomes devalued (ibid). Thus, some groups might struggle for representation and legitimacy as a result of tourism policies using culture for economic development.

4.6. Conclusion

This chapter explained the wider political economy context in which this study is situated. This was followed examining characteristics of poverty and inequality, and tourism, and providing justification for the study location in Brazil's Northeast. It was shown that, although significant progress was made in all aspects of human development, deep socio-economic inequality continues to persist between regions, the poorer North versus the richer South, and between races, the white versus the non-white. At the same time, the North and Northeast experienced rapid tourism growth facilitated by a large-scale tourism-related investment programme that intended to transfer benefits from the richer South to the poorer North. Therefore, studying the relationship between tourism, poverty and inequality lends itself well to the Northeast of Brazil. The location of Imbassaí, which is a small coastal tourist destination in the municipality of Mata de São João in the state of Bahia in the Northeast of Brazil, was chosen. The choice was particularly influenced by the researcher's access and familiarity with the destination. The chapter also pointed out that to date limited research is available on the impacts of domestic tourism, the impact of tourism on (multidimensional) poverty and inequality, and power relations in tourism in Brazil, particularly, in coastal regions in Brazil's Northeast - thus, providing the opportunity to develop a contribution to knowledge.

The next chapter presents the study's methodology focussing on the philosophical position, the chosen methodological approach and methods and outlining the process of data collection and analysis.

5. Methodology

"Some people consider research as a movement, a movement from the known to the unknown. It is actually a voyage of discovery."
(Kothari, 2004:1)

5.1. Introduction

This chapter presents the researcher's *"voyage of discovery"* (Kothari, 2004:1) by discussing the methodology of this research. Kothari (2004:8) points out that

> *"when we talk of research methodology we not only talk of the research methods but also consider the logic behind the methods we use in the context of our research study and explain why we are using a particular method or technique and why we are not using others so that research results are capable of being evaluated either by the researcher himself or by others"*.

Accordingly, research methodology is 'more than just the methods' as it entails the wider underlying assumptions, the approach and methods that were purposefully chosen to discover 'the unknown'. Firstly, this chapter provides insights into the philosophical position by drawing attention to ontological and epistemological assumptions. This is followed by outlining and justifying the chosen research approach and methods. Thereupon, the chapter moves on to presenting the overall research programme, and explaining data collection and data analysis for the different parts of the fieldwork. Before the chapter closes with a conclusion, a critical reflection on the chosen research approach and methods is provided focusing on the value of the methods, the process of data collection and the approach for analysing the data.

5.2. Research philosophy

Since a positivist approach enables poverty analysis and development of intervention strategies for a wider population, it has dominantly been applied to analyse the relationship between tourism and poverty, and between tourism and inequality, by using quantitative measurement to determine the impact of tourism on reducing income poverty and the income gap between the rich and the poor. This study rejected a solely quantitative perspective of poverty and inequality that is exclusively related to income; instead a multidimensional view on poverty and inequality, conceptualised by tourism-related income, its value in terms of consumption, and valuable opportunities distributed among different socio-economic groups, was adopted. As such, it was acknowledged that economic conditions may play a significant role in order to achieve *"what really matters, namely the kind of life that a person is able to lead and the choices and opportunities open to her in leading that life"* (Lister, 2004:15). The researcher's perspective on poverty and inequality was influenced by reading about Sen's (1973 & 1995a) capability approach and by experiencing life in Brazil that showed disparities between people, that were wider and deeper than only related to income - thus, emphasising the need to integrate consumption and further valuable opportunities resulting from tourism and their distribution among different socio-economic groups into the study.

Despite the dominance of the positivist paradigm to objectively measure the impact of tourism on income-poverty and -inequality using absolute determinants, it has been widely acknowledged that both, poverty and inequality, are relative to the social context people live in (e.g. Sen, 1995a; Townsend, 1979). This, therefore, requires deeper knowledge to understand the relationship of poverty and inequality in a specific tourism context.

This doctoral study was situated in a critical paradigm, in that perceptions of poverty dimensions and inequality were considered to be socially constructed within a community, particularly, through power relations. Johnson and Duberley (2013:117) point out, that, from a critical stance, all knowledge is being viewed as *"contaminated at source by the influence of socio-cultural factors upon sensory experiences"*, whilst reality is believed to exist independently, which reflects an objective ontology. However, the researcher can only access the reality through research participants' multiple perspectives and interpretations - meaning that, although reality is 'out there', the research only enables coming closer to the truth. Kelemens and Rumens (2008) add that all knowledge, which is constructed by social, political and cultural factors, manifests itself in structures that influence human agency. Therefore, adopting Giddens' conception of power as interplay between structure and agency (see: Chapter 3. Conceptual thinking) aligned well with the critical approach of this study (Morrow & Brown, 1994).

The researcher did not consider herself as being passive, neutral and objective, instead as actively engaged in conducting the research - an *"active social agent"* as described Johnson and Duberley (2013:62). The researcher herself is positioned in a *"location within shifting networks of relationships, which can be analysed and changed"* (Maher & Tetreault, 1994:164). This position/ location can be characterised by the researcher's race, gender, class and other social dimensions (ibid). England (1994) argues that the *"positionality [i.e. position based on class, gender, race, etc.] and biography of the researcher plays a central role in the research process, in the field as well as in the final text"*. Therefore, a subjective epistemology requires from the researcher to develop critical consciousness through reflection of ontological and epistemological assumptions, particularly how the researcher's positionality influences the relationship between the researcher and the research participant during data collection and analysis (Kelemens & Rumens, 2008). Alvesson and Skoeldberg (2009:9) explain that reflection can be defined as *"the interpretation of interpretation and the launching of a critical self-exploration of one's own interpretations of empirical material (including its construction)"*. In other words, as a 'subjective researcher', critical reflection on pre-assumptions, and power dynamics, and how they influence the process of data collection, and particularly the process of data analysis, was crucial since participants' interpretations of reality were interpreted by the researcher who was influenced by her own (socially constructed) background (see: Section 5.8. Critical reflections). Johnson and Duberley (2013) confirm that reflexivity it is a key issue in critical research.

5.3. Research approach

This study utilised a mixed-methods approach, which *"make[s] perfectly good sense"* from any philosophical standpoint (Guba & Lincoln, 2005:200), and consequently, has been *"increasingly articulated, attached to research practice, and recognised as the third major research approach"* (Johnson, Onwuegbuzie & Turner, 2007:112). In this study, triangulation was applied by combining quantitative with qualitative methods: the former was value chain analysis (VCA) and the latter involved photo-elicitation and interviews. A key advantage of triangulation is that it enables capturing a more comprehensive and holistic portrayal of the topic under investigation (Holtzhausen, 2001). Thus, the application of triangulation allowed obtaining a rich picture of the relationship between tourism, poverty and inequality. A quantitative approach was required to measure tourism-related revenue flows and income, and particularly, to determine different socio-economic groups (Objective 1) and a qualitative approach was needed to analyse the value of tourism-related income via consumption (Objective 2), examine further valuable opportunities (Objective 3), explore the distribution among different socio-economic groups (Objectives 2 & 3) and investigate power relations among actors within and between different spatial scales (Objective 4) from participants' perspectives.

Relating to Morse's (1991) distinction between sequential and simultaneous methodological triangulation, a sequential approach was chosen. According to Cronholm and Hjalmarsson (2011), sequential triangulation refers to an investigation with one phase being dependent on the previous. In this study, results gathered during the quantitative research (Part 1) were crucial for planning and designing the qualitative study (Part 2), in that obtaining information about tourism-related revenue flows and income and determining different socio-economic groups (Objective 1) in Part 1 was required for analysing the value of tourism-related income via patterns of consumption and further valuable opportunities resulting from tourism among these different socio-economic groups in the society (Objectives 2 & 3). This approach describes a variation of the explanatory design model, in which quantitative participant characteristics are used to guide sampling for the more in-depth qualitative study (Creswell, Plano Clark, Gutmann & Hanson, 2003). It also requires from the researcher to clearly state the quantitative criteria that are used for selecting participants for the qualitative phase (Creswell & Plano Clark, 2006). In this study, groups were defined by income levels (the process of defining groups is explained in Section 5.6.2. Data analysis and the results are presented in Section 6.4. Conclusion). A key challenge of this approach is the amount of time for implementing two phases (ibid), which was anticipated by the researcher and carefully considered (see: Section 5.5. Research programme). Applying sequential triangulation was not only crucial for achieving the objectives of the study; however, also enabled critical reflection on the approach, methods, data collection and analysis (see: Section 5.8. Critical reflections).

This study was based on the assumption that there was not 'one right answer' of the phenomena being studied; instead there were multiple perspectives of research participants on the relationship between tourism, poverty and inequality, and the influence of power relations. Therefore, in contrast to classical triangulation utilising convergence validity i.e. using independent methods to validate research results, this research used triangulation in a sense of data complementarity to obtain a rich picture of poverty, inequality and power relations in a tourism context (Hammersley, 2008; Kelle, 2001). Flick (2002:227) supports that *"triangulation is less a strategy for validating results and procedures than an alternative to validation [...] which increases scope, depth and consistency in methodological proceedings"* - thus, emphasising the potential benefits of triangulation to contribute to complementarity.

5.4. Research methods

5.4.1. Quantitative value chain analysis

Tourism has *"multitude of different effects on the economy"* and the people within it (Mitchell & Ashley, 2010:21). To capture the impacts of tourism on the local economy, this study employed value chain analysis (VCA), since it was, firstly, highly relevant for achieving Objective 1 that seeks to measure tourism-related revenue flows and income at a local level, and to determine different socio-economic groups. As such, it provided crucial information for designing, planning and conducting Part 2 of this study. Secondly, to obtain a full picture of the relationship between tourism, poverty and inequality, it was crucial to understand the tourism value chain, as suggested by the UN (2011).

Initiated by the Overseas Development Institute (ODI) and the Netherlands Development Organisation SNV, VCA has been applied since 2005 to map the local tourism industry and its actors, track revenue flows and income (Mitchell & Ashley, 2010, Mitchell & Ashley, 2009; Mitchell et al., 2015). A main focus of practitioners is to analyse how much tourist spending goes to the poor to identify nodes of intervention along the value chain in order to increase the pro-poor impact (Mitchell & Ashley, 2010, Mitchell & Ashley, 2009). Nonetheless, it not only allows measuring how much goes to the poor, but also enables identification of income flows to further socio-economic groups (Mitchell, 2012). It is a greatly appreciated tool, foremost among practitioners, since a standard VCA framework and associated guidelines make its application relatively easy, and time- and cost-efficient (Ashley et al., 2009). This doctoral study utilised the standard VCA framework that has been developed under the guidance of the International Trade Centre (ITC) and tested and recommended by well-known practitioners in this field (see: Ashley et al., 2009). Since it has already been tested and adapted in the field, using a standard framework was beneficial for ensuring of validity and reliability of data.

Despite appreciation of the VCA framework in the practitioner world, it has been less frequently applied in academic research. Since it serves primarily as a diagnostic tool to assess the monetary impact and to define intervention strategies (Ashley & Mitchell, 2008), it has been criticised for lacking qualitative analysis. Meyer (2009) points out that it does neither provide insight on the value of income from tourism (e.g. who generates income from tourism and what income is used for) nor on power relations in the local community in order to develop understanding of the underlying reasons for the 'measured' impacts. These weaknesses of VCA were addressed in the qualitative part of this study.

5.4.2. Qualitative photo-elicitation and interviews

The qualitative second part of this study utilised photo-elicitation and interviews. Falling under the umbrella of visual methodologies, photo-elicitation integrates and discusses participant-generated images in interviews (Rose, 2016). Photo-elicitation, therefore, can enable greater depth and insight into social phenomena than interviews that only rely on verbal communication to access participants' knowledge about phenomena (Bolton, Pole & Mizen, 2001; Clark-Ibáñez, 2004). On the other hand, it might be difficult to achieve a sufficient sample size in a photo-elicitation project since it requires strong commitment of participants (Garrod, 2008; Rose, 2016). To gain in-depth insights about the relationship of tourism, poverty and inequality, and power relations from different perspectives and to gather a sufficient sample size, the two methods, photo-elicitation and interviews, were combined in this study.

In recent years, visual methodologies have been increasingly applied across the social sciences – which is considered a result of the shift from pre-modernity to modernity, and from modernity to postmodernity (Rose, 2016). While it is assumed that visual images were not important in premodern times, in modernity and postmodernity 'the visual' has become intertwined with knowledge (Jenks, 2015). Although tourism is widely considered as a modern phenomenon (Urry & Larsen, 2011), Brickell (2012) points out that tourism research does not fully make use of visual methods - in particular, not in the context of uncovering perceptions of locals towards tourism development. In fact, tourism studies that utilise visual methodologies concentrate on found rather than participant-generated images (Brickell, 2012). Thus, employing photo-elicitation in this study responded to Garrod's (2008) request that more tourism research should capitalise on this method since it can provide greater insight into phenomena.

The method of photo-elicitation was chosen, because it *"can enhance qualitative methods and help address some pitfalls in conventional interviews"* (Clark-Ibáñez (2004:1512) and can provide *"the opportunity to gain not just more but different insights into social phenomena"* in contrast to other research methods (Bolton et al., 2001:503). Collier (1957) supports that photos can help participants to explain their experiences and feelings, and thus, to go beyond the limitations of research methods that rely on oral or written data. Particularly, for exploring everyday-life, photo-elicitation is considered useful since it

> *"allows the research participants to reflect on everyday activities in a way that is not usually done; it gives them distance from what they are usually immersed in and allows them to articulate thoughts and feelings that usually remain implicit"* (Rose, 2016:316).

This research was based on such an everyday context since it sought to analyse the value of tourism-related income via consumption (Objective 2), and to examine valuable opportunities resulting from tourism (Objective 3). By taking a photo of a certain aspect of tourism, participants emphasise the value of this aspect or in other words, *"They [the photos] are charged with complex choices about what a person wants to communicate and they carry psychological and emotional nuances and values"* (Hatten, Forin & Adams, 2013:3). In a wider sense, images can visualise social relations and difference (Fyfe & Law, 1988; Hodgetts et al., 2007a) – which made the method of photo-elicitation particularly useful for this study since it sought to explore the distribution of tourism impacts among different socio-economic groups (Objectives 2 & 3) and to investigate power relations (Objective 4). Rose (2016:308) emphasises that all visual methods, and particularly photo-elicitation, aim *"to explore and account* *for social difference and hierarchy"*. Thus, photo-elicitation was suited well to the critical stance of this study.

	Advantages of the method are that it...		Limitations of the method are that it...
+	**provides "an opportunity to gain not just more but different insights ito social phenomena, which research methods relying on oral, aural or written data cannot provide"** (Bolton et al., 2001:503)	-	**"achieving a reasonably representative sample will likely always be a challenge" due to "the task-based nature of the method and the considerable commitment required of the volunteers"** (Garrod, 2008:397)
+	**is perceived as easy and fun, and participants get 'the photos' from their involvement, which was "especially appreciated in poorer households"** (Brickell, 2012:103)	-	**involves many practicialities that need to be taken care of in advance (e.g. potential participants, number of participants, camera)** (Rose, 2016)
+	**is useful to explore 'everyday life' since "allows the research participants to reflect on everyday activities in a way that is not usually done"** (Rose, 2016:316)	-	**adds another complex layer to the process of preparing, conducting and analysing an interview, which is time-consuming** (Clark-Ibanez, 2004)
+	**decreases the difference in power between the researcher and the study participants as the participants are in charge of taking their own photos** (Clark-Ibanez, 2004; Hatten *et al* , 2013; Loeffler, 2004)	-	**only through interviewing the information carried by a photograph can be accessed** (Collier, 1957)
+	**encourages 'more affective and emotional' communication** (Bagnoli, 2009)		

Table 5-a: Photo-elicitation, advantages and limitations
Source: Author

From a critical stance, considering power and status differences between researcher and participant and how they influence the research process is crucial, in particular, when undertaking research with marginalised people (Bolton et al., 2001). This research included different socio-economic groups, whereas lower levels of income often signify a deprivation of basic capabilities which makes these individuals marginalised. Using photo-elicitation intended to respond to balancing power differentials between the researcher and these participants and was designed in a way that participants took photos and chose which ones they would like to talk about - thus, participants led the interview direction. Epstein et al. (2006) and Loeffler (2004) confirm the potential of photo-elicitation to reduce power differentials, which, according to Bagnoli (2009) can encourage more affective and emotional communication. Rose (2016:327) concludes that it is a productive method that requires researchers *"to be highly reflexive in their use of the method, making clear their own role in the photo-elicitation work and carefully exploring the impact of the various contexts in which they work"*.

Despite the benefits of photo-elicitation, experts warn that it involves many practicalities that need to be considered. Rose (2016:319) points out

> *"You need to find your participants, meet them, wait for them to take photographs, get the photos printed, arrange another interview, do that interview, chase up those participants who have not returned their camera, transcribe the interviews, and then analyse both photographs and transcripts".*

Particularly, finding participants who are interested and actively engaged in taking the photos can be a key issue as Garrod (2008:397) points out that *“given the task-based nature of the method and the considerable commitment required of the volunteers, achieving a reasonably representative sample will likely always be a challenge”*.

To overcome this limitation, this study also included interviewing individuals, who did not want to engage in taking photos or who took the role of an expert. Interviewing is a method that *"uses individuals as the point of departure for the research process, assumes that individuals have unique and important knowledge about the social world that is ascertainable, which can be shared through verbal communication"* (Hesse-Biber & Leavy, 2011:94). Despite the limitations of interviews (see: Table 5-b), interviews can provide background knowledge (McGehee, 2014) and the flexibility of discovering new themes that have not been analysed initially (Robson, 2011). As such, conducting interviews in this study also allowed going beyond the analysis of income and develop a rich picture of the relationship between tourism, poverty and inequality by analysing the value of tourism-related income via consumption (Objective 2), examining further valuable opportunities provided by tourism (Objective 3) and investigate power relations (Objective 4) from the perspective of different socio-economic groups, and get insights into tourism development in general from experts.

Advantages of the method are that it...	Limitations of the method are that it...
+ **"can provide background for studies using multiple methods"** (McGehee, 2014:370)	- **can result in "poor data quality, if the power differentials and status differences between the researcher and the informant are not taken into consideration"** (McGehee, 2014:371)
+ **offers a "flexible and adaptable way of finding things out"** (Robson, 2011:280)	- **its "dependency on the honesty of the informant to the success of the interview and the research project"** (McGehee, 2014:371)
+ **"has a high validity, as interviewers can ensure that questions are understood by the interviewees"** (Jordan & Gibson, 2004:222)	- **is "time consuming" including preparation, the interview itself, transcription and analysis** (Robson, 2011:281)
+ **"can create rich, descriptive data with many colourful and illustrative examples"** (Jordan & Gibson, 2004:222)	- **"relies on interviewees to volunteer to participate"** (Jordan & Gibson, 2004:223)

Table 5-b: Interviews, advantages and limitations
Source: Author

5.5. Research programme

Applying sequential triangulation required two separate fieldwork visits to the destination (see: Figure 5-1). In advance, a pre-visit was conducted for one week in September 2016 to talk to potential participants and develop an initial high-level map of the local tourism industry. After receiving research approval for the methodology, for ethics and for funding, the first fieldwork visit was scheduled from 20th February to 22nd March 2017 to conduct Part 1 of this study, namely value chain analysis (VCA), in accordance with the International Trade Centre (ITC) guidelines (see: Ashley et al., 2009). The first fieldwork visit captured the end of the high season, which typically starts with the Christmas holidays (in December) and lasts until the end of Carnival (in

February/March i.e. 6 weeks before Easter), and the starting low season[24], when business owners and managers were free for interviews.

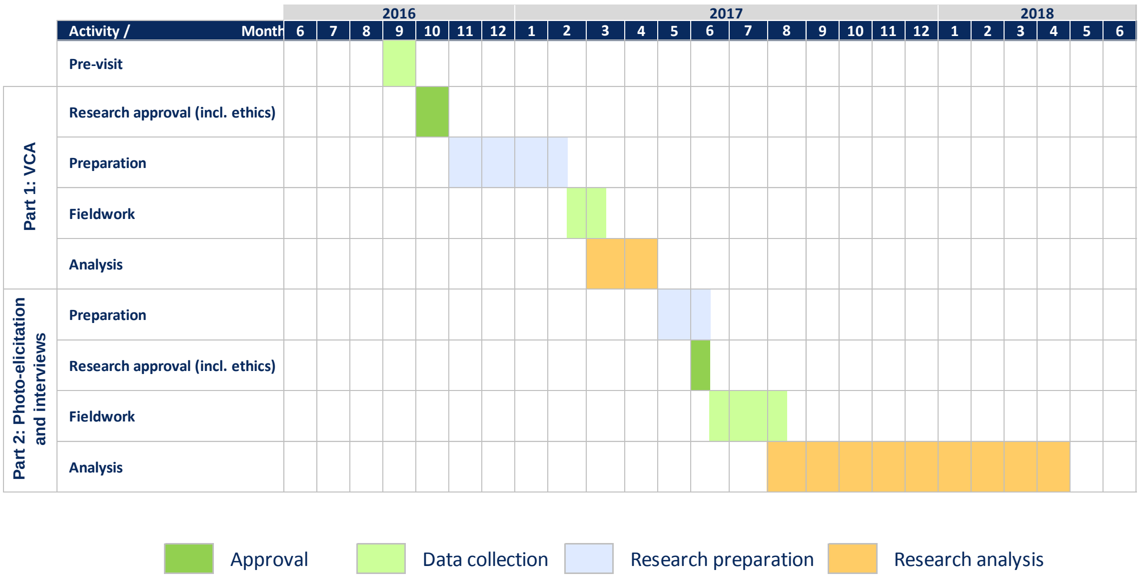

Figure 5-1: Research programme
Source: Author

As mentioned before, results and experiences gathered during the first part were used to design and plan the second part, namely photo-elicitation and interviews. After receiving full approval, the second fieldwork visit took place from 17th June to 17th August 2017. This time was mainly chosen due to availability of research participants since tourism activities are very limited at that time allowing them to engage in the research.

5.6. Part 1 - Quantitative value chain analysis

5.6.1. Data collection

5.6.1.1. Approach to data collection

Value chain analysis (VCA) is based on 'following the tourism dollar' by examining total tourist spending along the value chain to measure tourism-related revenue flows and income. Ashley et al. (2009) suggest three phases to conduct VCA (see: Table 5-c).

[24] The seasons are mainly distinguished by 'high' and 'low'.

This study focused on Phase 1 since it was mainly relevant for achieving Objective 1 of this research. Nonetheless, potential interventions (Phase 2), in form of short-term and long-term suggestions, were developed in advance to the second fieldwork visit, and shared with different tourism stakeholders in the destination (see: Appendix 1).

Phase 1	Phase 2	Phase 3
Diagnosis of current situation and context: Map the tourism value chain in order to develop understanding of tourism in the destination and monetary flows	**Project opportunities, prioritisation and feasibility: Develop a list of potential interventions in order to increase the pro-poor impact**	**Project planning: Plan, implement and monitor interventions**

Table 5-c: Pro-poor VCA phases
Source: Author, based on Ashley et al., 2009

The ITC-guidelines provide a structured approach based on steps and activities for all phases, which was followed in this study (see: Table 5-d).

Activities a-d were carried out in preparation for the fieldwork:

- Activity a: the scope of destination was formed by the local borders of Imbassaí, a tourist map was used for guidance (see: Section 5.6.1.2. Process and tools)
- Activity b: as target groups different socio-economic groups were defined using generally accepted lines i.e. the poverty line for upper-middle income countries and the regional minimum salary. This study focused on poor-income and low-income groups and paid particular attention to race (see: Section 5.6.2. Data analysis)
- Activity c and d: having analysed available information e.g. about tourism supply and demand (see: Chapter 4. Research location), and having established an overview of tourism policies and plans (see: Appendix 2) provided contextual knowledge which was valuable for conducting the further defined activities since it enabled greater understanding

Activities e-f were conducted during the pre-visit in September 2016; activities g-h represent the actual data collection that was done during the first fieldwork visit from 20th February to 22nd March 2017 (see: Section 5.5. Research programme). These activities g-h are described in the next Section 5.6.1.2. Process and tools.

The activities i-j commenced towards the end of the first fieldwork visit and were finalised afterwards. These are documented in the Section 5.6.2. Data analysis and Chapter 6. Results - Part 1.

Phase 1			
Step		**Activity**	
I	Prepare the study	a	Define the scope of the destination
		b	Define the target group(s)
II	Map the big picture i.e. enterprise and other actors in the tourism sector, links between them, demand and supply data, and the pertinent context	c	Get on top of existing information
		d	Identify relevant policies and plans
		e	Map actors along the tourism value chain
III	Map where the target groups do and do not participate	f	Annotate map to show where the target groups participate
IV	Conduct fieldwork with service providers of each node of the chain and with tourists	g	Tourism value chain survey - gathering information for each node of the value chain
		h	Tourist survey - gathering information from tourists
V	Track revenue flows and income and estimate how expenditure flows through the chain and how much accrues to the target groups	i	Analyse the data and interpret the results
		j	Estimate how much tourism expenditure reaches the target groups via different nodes in the chain

Preparation	*Data Collection*	*Data Analysis*

Table 5-d: Pro-poor VCA phase 1: steps and activities

Source: Author, based on Ashley et al, 2009:17,18

5.6.1.2. Process and tools

Secondary material and informal conversations

To map actors along the tourism value chain (activity e) and show where the target groups participate (activity f), practitioners often use a participatory approach based on a workshop format at the beginning of conducting VCA (Ashley et al., 2009). While a workshop provides the benefit of getting to know tourism actors and laying *"the ground for good participation throughout the work"*, it might be difficult to describe a *"complicated reality"* with a large group of participants (Ashley et al., 2009:23,24).

Instead of using a workshop format, the pre-visit was used to identify tourism businesses and actors in the destination and to recognise where the defined target groups participate through the use of available secondary material (e.g. tourism map) and informal conversations. This approach was considered to be more appropriate and effective due to the researcher's familiarity[25] with the destination, the diversity of stakeholders (e.g. in terms of background, nationality, education) and potential power relations among them, which would have made it difficult to manage the group dynamics in a workshop format. The outcome was a high-level stakeholder map (see: Figure 5-2) and detailed list of tourism businesses/actors, from which a sample for conducting the tourism value chain survey (activity g) was drawn.

Figure 5-2: High-level stakeholder map
Source: Author

Tourism value chain survey

The tourism value chain survey (activity g) sought to gather information about financials (e.g. rates charged, occupancy, payment to staff and suppliers), tourism supply and the wider sectors (e.g. shopping facilities), tourism demand (e.g. market segments) and impact (e.g. potential linkages) from tourism actors i.e. business owners and managers across the value chain. This study utilised different questionnaires for each sector of the tourism value chain (see: Appendix 3) and followed the associated guidelines to conduct the survey (see: Ashley et al., 2009). The questionnaires were

[25] Despite the researcher's familiarity with the destination, potential bias could be minimised/ avoided. Firstly, mainly fact-based information (type and number of tourism businesses) were collected; secondly, the information was collected through informal conversations with different people (connected and not-connected to the researcher) and through using available secondary material that provide facts; and thirdly, both sources of information were triangulated.

distinct in a way that they seek to gather information that are specific for each sector. For example, while occupancy rate was a crucial information to be gathered from the accommodation sector, it was less relevant for shopping. Another example were questions related to supply, in that sourcing of agricultural products was mainly relevant for accommodation and food and drinks, whilst for shopping, supply of materials was the main focus.

The questionnaires were translated into Portuguese using parallel translation[26] in order to avoid the risk of losing meaning (Usunier, 1998). To do so, the researcher, who is fluent in Portuguese, was supported by a native speaker from Brazil, who teaches Portuguese at English universities, colleges and schools.

To conduct the tourism value chain survey, a representative sample was selected from the list of tourism businesses/actors that was a result of the pre-visit to the destination, using stratified random sampling (see: explanations in Table 5-e).

Activity		Sample frame	Sampling technique[1]	Sampling process
g	Tourism value chain survey - gathering information for each node of the value chain	List of tourism actors	Stratified random sampling	1) Divide population into smaller groups (i.e. strata) using shared characteristics 2) Take a random sample from each stratum in a number proportional to the group's size when compared to the population
h	Tourist survey - gathering information from tourists	n/a	Convenience sampling	Select sample of population members because of their convenient accessibility for the researcher

Table 5-e: VCA sampling
Source: Author

[26] 'Parallel translation' requires two independent translators to translate the source questionnaire into target questionnaires, which will be compared to create a final questionnaire.

Dividing the population of tourism actors into relevant strata was crucial for drawing a representative sample due to the diversity of actors in the tourism value chain (Saunders, Lewis & Thornhill, 2012). Since the guidelines do not specifically address sampling, practitioners were contacted and a minimum quota of 50% of each stratum was suggested (Spenceley, 2016). Overall, 57 questionnaires were conducted (see: further details in Table 5-f).

The questionnaires were administered by the researcher which enabled clarification of questions in order to ensure understanding (Gill & Johnson, 2010). King and Harrocks (2011) suggest choosing an appropriate environment, especially when dealing with sensitive information, in order to maintain reliability of data. Since the information to be gathered from tourism business owners and managers was quite sensitive (e.g. cost estimates and salaries), the questionnaires were carried at the participant's work environment where they felt comfortable, whilst ensuring the researcher's health and safety (see: Section 5.6.1.4. Ethics).

Tourist survey

Due to the lack of tourist statistics of the destination, a tourist survey was carried out (activity h). The aim of the survey was to gather information about tourists (e.g. nationality, length of stay, purpose of travel) and about their expenditure in the destination (Ashley et al., 2009). In order to follow the guidelines of the VCA framework, the suggested standard questionnaire was employed and also translated into Portuguese using parallel translation (see: Appendix 4).

To conduct the tourist survey, a self-administered approach was chosen since only descriptive information needed to be gathered in a limited time-frame. Questionnaires were distributed to accommodation providers, who displayed the questionnaires, in English and Portuguese, at the reception and/or in rooms. Unfortunately, the response rate and the quality of filled questionnaires were relatively low; therefore, it was changed to an interviewer-administered, face-to-face approach, and conducted using convenience sampling i.e. potential participants were approached at the beach (while they waited for food and/or drinks) (see: further explanations in Table 5-e). Overall, a sample of 75 responses was collected, which is in line with common response rates in the practitioner field (Spenceley, 2016).

Direct tourism service provider		Size of population [number]	Collected sample *[number]*	Quota* *[in %]*
Accommodation	**Hotel**	**2**	**2**	**100%**
Accommodation	**Pousada**	**27**	**16**	**59%**
Food & drinks	**Bar** [Just drinks]	**3**	**2**	**67%**
Food & drinks	**Barraca** [Beach bar]	**18**	**4**	**22%**
Food & drinks	**Individual seller** [Food & drinks]	**17**	**8**	**47%**
Food & drinks	**Restaurant** [Lunch & dinner]	**16**	**8**	**50%**
Food & drinks	**Restaurant** [Dinner]	**6**	**4**	**67%**
Shopping	**Craft stall**	**3**	**2**	**67%**
Shopping	**Individual seller** [craft]	**10**	**2**	**20%**
Shopping	**Shops**	**6**	**3**	**50%**
Entertainment/ activities	**Sports**	**5**	**3**	**60%**
Entertainment/ activities	**Massage**	**2**	**1**	**50%**
Entertainment/ activities	**Waterfall**	**1**	**1**	**100%**
Entertainment/ activities	**Jangada**	**3**	**1**	**33%**
Supply	**local**	**0**	**0**	
		119	**57**	

** smaller sample than 50% was accepted when the product/service was highly standardised*

Table 5-f: Sample per strata

Source: Author

Diary

During the fieldwork visit, a diary using Microsoft word was written. The diary describes activities, meetings and conversations with people, thoughts, feelings and ideas for the second part of the research. Thus, the researcher could keep a record of events and reflections on the research method, the process, developed skills and initial results. Nadin (2006) confirms that a research diary can be used to assist reflexive thinking in the research process.

5.6.1.4. Ethics

Ethical implications were carefully considered in advance using the university's guidelines. To ensure conformity with the SHU Research Ethics Policy, the Research Ethics Checklist (SHUREC1) and the Application for Research Ethics Approval (SHUREC2a) was completed for the first fieldwork visit and approved (see: Appendix 5). The first fieldwork visit was based on a standard VCA framework that has been tested and recommended by well-known practitioners in the field (Ashley et al., 2009). Therefore, the design underwent rigorous scrutiny without ethical problems and dilemmas being identified (ibid). The research was carried out overtly by introducing herself as a researcher, explaining research aim and objectives to participants, and asking for consent (Zikmund, 2009). Whilst for the tourist survey, agreeing to complete the standard questionnaire was taken as consent by respondents, for the tourism value chain survey, an information sheet (see: Appendix 6) was shared and a signed consent form from each participant was obtained (see: Appendix 7). Confidentiality and anonymity were considered paramount for storing, analysing and presenting the data, which was addressed in a data management plan (DMP) (see: Appendix 8).

5.6.2. Data analysis

To analyse the collected data, the data was entered into pre-defined Microsoft-Excel-based frameworks that were set up by the researcher in line with each questionnaire (see: Figure 5-3). The process of entering the data started whilst collecting the data in the destination. To enter the data the researcher was assisted by a German student studying BSc Economics majoring in Environment and Development, so that the data entered data could be double-checked to enhance validity.

This section continues by describing each step of the process of analysing the data for the tourist survey and tourism value chain survey.

5.6.2.1. Tourist survey analysis

Step 1: Enter data into framework

All data gathered through the tourist survey was entered into the framework (see: Figure 5-3).

Tourist Survey ANALYSIS

Sequence no	ID	Q1	Q2	Q3	Q4	Q4a
Enter no	*Enter ID [No]*	*Name of accommodation [text field]*	*Type of travelling [choose]*	*With how many people? [enter value]*	*Country of residence [choose]*	*International vs. national [automatic]*
1	1	Pousada Entre as aguas	Alone	0	Germany	international
2	2	Pousada Entre as aguas	As a couple	2	Germany	international
3	3a	Pousada Canto de Imbassai	As a couple	2	Germany	international
4	3a	Pousada Canto de Imbassai	As a couple	2	Germany	international
5	4	Pousada Canto do Sabia	In a group	2	Germany	international
6	5	Accommodation family & friends	With family	2	Germany	international
7	6	Accommodation family & friends	With family	2	Germany	international
8	7	Iberostar	With family	4	Brazil	national
10	9	Canto de Imbassai	With family	3	Uruguay	international
11	10	Accommodation family & friends	Other	3	Brazil	national

Figure 5-3: Tourist survey - framework

Source: 1_Tourist Survey - Analysis_20170430, Sheet "Enter data"

Step 2: Calculate tourist spending

To calculate how much tourists spend for each node (transport, accommodation, food and drinks, shopping, entertainment/activities) of the value chain, two questions (Q8 and Q9, Appendix 4) were analysed. The data was extracted from the main framework and inserted into a new Excel-sheet (see: example "Accommodation" in Figure 5-4). To calculate spending per tourist for each node, the arithmetic mean (average = total sum of all the numbers (prices) / number of items (people the payment was made for) was utilised.[27] Combining the data from the tourist survey (i.e. average tourist spending per day) with data from the tourism value chain survey (i.e. accommodation occupancy and calculated number of tourist per year) enabled an estimation of how much total tourism expenditure enters the value chain. This estimation was used to validate revenue figures provided by participants of the tourism value chain survey.

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[27] The guidelines do not specify how to calculate average tourist spending.

Q9	Q9 - 5	Q8			Q4a
Payments for.. [enter no of people]	*How much did you pay [in REAL] ? [Accommodation]*	*Length of this trip [enter no of nights]*	*Price per person per night [in Real]*	*Price per night [in EURO]*	*International vs. national [automatic]*
1	650	1	650.00	216.67	national
2	1000	4	125.00	41.67	national
2	450	2	112.50	37.50	national
2	300	2	75.00	25.00	national
2	1250	3	208.33	69.44	national
2	3000	6	250.00	83.33	national
2	800	2	200.00	66.67	national
1	3000	4	750.00	250.00	national
2	1900	5	190.00	63.33	national
2	1300	5	130.00	43.33	national
2	360	2	90.00	30.00	national
2	700	2	175.00	58.33	national
2	400	2	100.00	33.33	national
2	2500	6	208.33	69.44	national
2	2500	6	208.33	69.44	national
2	240	1	120.00	40.00	national
1	750	2	375.00	125.00	national
1	219	1	219.00	73.00	national
2	480	4	60.00	20.00	national
2	480	4	60.00	20.00	national
2	360	2	90.00	30.00	national
2	540	4	67.50	22.50	national
2	540	4	67.50	22.50	national
4	3000	4	187.50	62.50	national
57			97.85	32.62	

Figure 5-4: Tourist survey - framework

Source: Tourist Survey - Analysis_20170430, Sheet "A9-5 Accommodation & origin"

5.6.2.2. Tourism value chain survey analysis

Step 1: Enter data into framework

To gather data along the tourism value chain, a different questionnaire was used for each node of the value chain i.e. accommodation, food and drinks, shopping, entertainment/activities. The data gathered for each node was entered into pre-defined frameworks for each node (see: example "Accommodation" in Figure 5-5).

Tourism Accommodation ANALYSIS

ID	Q3	Q3 - if other	Q4-1	Q4-2	Q4-3	Q4-4
Enter ID [No]	*MAIN type of accommodation [choose]*	*Enter 'other' [text field]*	*Transfer [yes/ no - choose]*	*Spa treatments [yes/ no - choose]*	*Restaurant [yes/ no - choose]*	*Business centre [yes/ no - choose]*
P_2	B&B / pousada	na	Yes	Yes	No	No
P_10	B&B / pousada	na	Yes	No	Yes	No
P_12	B&B / pousada	na	Yes	No	Yes	Yes
P_6	B&B / pousada	na	No	No	No	No
P_8	B&B / pousada	na	Yes	Yes	Yes	No
P_16	B&B / pousada	na	No	No	No	No
P_11	B&B / pousada	na	Yes	No	No	No
P_13	B&B / pousada	na	No	Yes	No	No
P_7	B&B / pousada	na	Yes	No	No	No

Figure 5-5: Tourism accommodation - framework

Source: 2a_Tourism Accommodation - Analysis_20170411, Sheet "Enter data"

Step 2: Calculate revenue for each node of the tourism value chain

Each node-questionnaire included questions related to revenue; if participants did not provide an answer, the revenue was calculated separately. For example, Q7 in the food and drinks questionnaire specifically addressed revenue; and in the accommodation questionnaire, Q21 asked for revenue for different categories (e.g. room); if the participant did not provide an answer, the room revenue was calculated based on the average room price (Q7-2), number of rooms (Q7-3) and beds (Q7-4), and occupation (Q17).

Within each node, the average revenue was calculated using the arithmetic mean (average = total sum of revenue / number of items (sample size of stratum) for different strata.[28] For example, the food and drinks sector included the following strata: bar [just drinks], barraca [beach bar], individual seller, restaurant [lunch and dinner], restaurant [dinner]. The average revenue per business in each stratum was calculated using the sample data, and then extrapolated for the whole population (see: Figure 5-6).

Direct tourism service provider		Size of population [number]	Av. revenue per year per business [in BR$]	Av. revenue per year per node [in BR$]	Sales to tourist [in %]	Av. revenue from tourism per year per node [in BR$l]	Av. revenue from tourism per year per node [in GBP]
Food & Drinks	ALL	60					
Food & Drinks	Bar [Just drinks]	3	23,600	70,800	50%	35,400	8,602
Food & Drinks	Barraca ['standardised']	18	197,000	3,546,000	95%	3,368,700	818,592
Food & Drinks	Individual seller [Acaraje]	3	16,800	50,400	100%	50,400	12,247
Food & Drinks	Individual seller [Cheese]	4	24,800	99,200	100%	99,200	24,106
Food & Drinks	Individual seller [Coconut]	1	11,840	11,840	100%	11,840	2,877
Food & Drinks	Individual seller [Icecream]	4	48,000	192,000	100%	192,000	46,656
Food & Drinks	Individual seller [Sweets & nuts]	5	18,240	91,200	100%	91,200	22,162
Food & Drinks	Restaurant [Mix]	16	207,500	3,320,000	50%	1,660,000	403,379
Food & Drinks	Restaurant [Dinner]	6	295,133	1,770,800	75%	1,328,100	322,727

Figure 5-6: Revenue calculation, Node: food and drinks
Source: Report VCA_20180620, Sheet "Impact_Food & Drinks"

This process was followed for the different sectors i.e. shopping, entertainment/activities and other. In terms of the accommodation sector, room prices for each businesses that were not part of the sample were researched (e.g. from

[28] The guidelines do not specify how to calculate average revenue.

websites) and the average occupancy rate (based on the sample) was used to calculate the average revenue for these.

Combining all revenues of each node, the total turnover of the local tourism industry was calculated (see: Section 6.3.1. Local tourism-related revenue flows and income).

Step 3: Estimate how much reaches the target groups

As target groups, poor-income and low-income groups were defined and specific consideration was given to racial groups due to inequality in Brazil being strongly linked to races. The relevant criteria were mirrored in the questionnaires for each node of the value chain[29]. For example, the accommodation questionnaire Q8 addressed number and characteristics of staff (gender, origin, and race) with regard to level of qualification ('management', 'qualified and semi-qualified', 'not qualified'). Q9 addressed the monthly salary in relation to qualification and characteristics (origin and race) of staff. The same questions can be found in each node-questionnaire; however, with different numbering. If the business was run by an individual entrepreneur (i.e. the questions related to staff salary and characteristics did not apply), the average monthly profit was calculated. For example, the craft node questionnaire addressed monthly revenue (Q11 and Q12) and cost (Q15), so that the monthly profit could be calculated.

To estimate how much reaches the target groups, salaries were assessed against poverty- and low-income lines within each stratum of a node - which is suggested by practitioners (see: Ashley et al., 2009). Defining these lines is a *"challenging and important step"* since different lines (see: Table 5-g) can be applied leading to different implications for the whole study process (Ashley et al., 2009:11).

Brazil is classified as an 'upper middle-income country' (World Bank, 2018). In correspondence, the upper middle-income international poverty line of US$5.50 per day per person (= BR$527.76 per month per person), which was newly established in 2017 (World Bank, 2017), was applied to measure pro-poor income in this study. Accordingly, individuals earning less than BR$527.76 per month were considered to receive poor-income; people receiving between BR$527.76 and the minimum salary for the region of BR$931.20 per month as defined in the 'Convenção coletiva de trabalho' were considered low-income.

[29] It needs to be noted that due to the different target groups as defined in this study, the standard questionnaire was adopted. The standard questionnaire focused on gender - instead of races as in this study.

Line *[Source]*		in US$/ day/ person	in BR$*/ day/ person	in BR$/ month**/ person	in GBP***/ month/ person
1	**International Poverty Line** (World Bank, 2011)	1.90	6.08	182.32	44.30
2	**Lower middle-income International Poverty Line** (World Bank, 2017)	3.20	10.24	307.06	74.61
3	**Upper middle-income International Poverty Line** (World Bank, 2017)	5.50	17.59	527.76	128.24
4	**Poverty Line Brazil** (IBGE, 2011)			140.00	34.02
5	**Minimum salary (regional tourism industry)** (Convenção coletiva de trabalho, 2016)			931.20	226.28

* exchange rate of 3.1985163 (average 2017)

** 30 days

*** exchange rate of 0.24299925 (average 2017)

Table 5-g: Different poverty and low-income lines

Source: Author

The sum of all poor-income and the sum of low-income salaries was calculated for each stratum and for each node[30], and then contrasted with the total turn-over of each node. The results of VCA are presented in Chapter 6.

5.7. Part 2 - Qualitative photo-elicitation and interviews

5.7.1. Data collection

5.7.1.1. Approach to data collection

The process of conducting photo-elicitation can be a complex and time-consuming process. To make this process feasible and enable transferability, a process of six stages suggested by Rose (2016) and Guillemin and Drew (2010) was followed (see: Figure 5-h).

Stage I. Planning the practicalities, which involves activities a – e, was carried out in preparation for the second fieldwork visit that took place from 17th June to 17th August 2017. The process of collecting data in the research location started with the Stage II. Carrying out the initial briefing and lasted until Stage IV. Conducting the interviews was fully completed. Whilst conducting the interviews in the destination, completed interviews were continuously transcribed (see: activity m in Stage V. Analysing the interviews and photographs); however, the process of transcribing was only completed

[30] The total number of people in each stratum and in each node was gathered through mapping the tourism value chain and the tourism value chain survey e.g. business owners and managers reported staff numbers and their salaries.

after returning from the fieldwork visit. This was followed by a thorough process of coding and analysing of the information (see: activity n) and considering of how to present the photos (see: activity o). This process is documented in Section 5.7.2. Data analysis.

Stage		Activity	
I	Planning the practicalities	a	Determine the sample and sample size
		b	Organise cameras
		c	Plan 'initial briefing' and 'interviews' (e.g. location, length)
		d	Plan analysis of interviews and photos
		e	Consider 'ethics'
II	Carrying out the 'initial briefing'	f	Explain research aim and process (supported by information-sheet)
		g	Ask for consent i.e. signature on consent form
III	Printing the photos	h	Develop the photos
		j	Return the photos
IV	Conducting the interview	k	Explore meaning of the photos taken by the participant
		l	Discuss further themes according to interview guidelines
V	Analysing the interview and photographs	m	Transcribe interviews
		n	Code and analyse transcripts and photographs
VI	Presenting the results	o	Decide on how photos will be used (considering anonymity of participants, copyrights)

Preparation *Data Collection* *Data Analysis*

Table 5-h: Research process - photo-elicitation
Source: Author, based on Rose (2016) and Guillemin and Drew (2010)

5.7.1.2. Process and tools

Sampling

Conducting VCA in Part 1 of this study provided essential understanding of and insights into the tourism value chain (accommodation, food and drinks, shopping, entertainment/activities and supplier), tourism-related revenue flows and income and enabled identification of socio-economic groups involved in tourism (Objective 1). Following stratified random sampling, the researcher approached individuals from the different socio-economic groups, poor-income, low-income and higher-income (than minimum salary), and from different nodes of the tourism value chain (e.g. accommodation, food and drinks, shopping, entertainment/activities), and asked for their interest in participating in the photo-elicitation project or interviews. For example in terms of food and drinks, using VCA information, it was identified that individual sellers mainly receive poor-income; restaurant employees earn minimum salary which falls under the low-income group, and restaurant owners have higher levels of income. Alongside people who were integrated in the tourism value chain, individuals who did not have direct income from tourism (e.g. dustman employed by the administration), were also approached to study their perspectives on tourism development. Thus, data gathered in part 2 of the study could complement the data collected in the first part of this study with the aim of obtaining a rich picture of poverty, inequality and power relations in a tourism context.

Due to the challenges related acquiring participants for photo-elicitation projects (Garrod, 2008), a reasonably high target sample was developed and 55 potential participants were approached to ensure transferability. Eleven individuals declined, and seven dropped-out mainly due to time constraints. 37 people participated representing different socio-economic groups and different nodes of the local tourism value chain, locals who do not directly receive income from tourism and experts. Of the group of 37 participants, 24 participants were engaged in photo-elicitation, whilst one interview could not be conducted, because the participant had to travel on short notice. 13 participants were only involved in interviews since they were either not fully comfortable or had time-constraints to participate in photo-elicitation, or took the role of an expert (e.g. teacher for vocational tourism training). The emphasis in these (three) expert-interviews was about discussing general aspects of tourism development rather than how tourism influences their lives.

An overview of research participants, their socio-economic characteristics and further details in terms of the photo-elicitation and interviews can be found in Table 5-i. The table also highlights a code for each participant interview, which is used in Chapter 7. Results - Part 2 and Chapter 8. Discussion. The code (see: Figure 5-7) includes two IDs: for the participant and for the interview. The difference occurs because potential participants for the photo-elicitation were approached at an early stage, but the cameras were returned and the interviews were scheduled at a later stage (see: Participant-generated photos).

1_I_14

Participant-ID_I(nterview)_Interview-ID

Figure 5-7: Explanation of participant and interview code
Source: Author

Initial briefing

The photo-elicitation process started with an 'initial briefing', which was carried out with each research participant individually at their workplace. In the initial briefing, the information sheet (see: Appendix 9) was shared, the research aim and the process including ethical implications were explained, and participants were asked for consent (see: Appendix 10). A disposable camera, that was bought in the UK in advance to the fieldwork, was given to photo-elicitation participants and, if required, participants were given guidance on how to use the camera - as suggested by Guillemin and Drew (2010).

Participants were given a broad question for taking photos: 'how does tourism influence your everyday life?'. A broad question was chosen instead of specific ones, so that participants were not influenced by the researcher. This broad approach has been commonly applied in photo-elicitation studies (e.g. Brickell, 2012; Clark-Ibáñez, 2007; Hodgetts et al., 2007a). Brickell (2012:102), for example, tasked their participants *"to take photographs of anything related to tourism, which they considered positive or negative"*. To improve understanding of participants, initial examples were given such as: 'You receive income from tourism. You could take a photo of what you buy from your income'. Some participants shared initial ideas, for example, one participant said she was worried about the increasing violence in the destination and asked if she could take a photo that relates to this. All ideas of participants were supported in their ideas, whilst emphasising, that they should not take any risks while taking photos. Frith and Harcourt (2007) explain that participants need assurance, particularly if they have no experiences with photographing, that all photos are useful. Furthermore, they (ibid) point out that giving assurance to participants that they should take photos of what is important for them, is crucial for avoiding power dynamics, that would influence them in taking pictures of what they believe the researcher finds interesting.

Participant-generated photos

As mentioned in the previous section, in advance to the second fieldwork visit, disposable cameras were bought and taken to the destination. The aim was that all participants use the same equipment to take photos due to two main reasons: firstly, considering the context of inequality in this study, it was found to be appropriate; secondly, participants should *"reflect on everyday activities in a way that is not usually done"* (Rose, 2016:316) – since some people might take pictures with their phone daily, using a film camera intended to give a clearer focus to the activity. However, since the quality of the developed photos was an issue, at a later stage, some participants also used their own cameras/phones. Participants who used a disposable camera mostly used the full amount of photos (=27) they could take with a disposable camera; participants who used their own camera/phone provided five photos on average.

Code	Participant	Sector	Socio-economic characteristics			Photo-eliciation and interview details				
	[NOT REAL NAME]		Tourism income	Origin	Race	Photos with…	If not, why not?	Interview date [2017]	Interview length [min]	Interview language
1_I_14	Cody	Not (directly) in tourism	No direct	International	Branco (White)	Camera		29-Jul	36	German
2_I_24	Matt	Shopping	Poor-income	International	Preto (Black)	Camera		03-Aug	36	Portuguese
3_I_10	Dana	Accommodation	Higher-income	Brazil	Branco (White)	Camera		27-Jul	47	Portuguese
4_I_30	Lisa	Food & Drinks	Poor-income	Brazil	Preto (Black)	Camera		12-Aug	26	Portuguese
5_I_15	Rachel	Food & Drinks	Poor-income	Brazil	Preto (Black)	Camera		29-Jul	52	Portuguese
6_I_28	Finn	Food & Drinks	Low-income	Brazil	Preto (Black)	Camera		11-Aug	25	Portuguese
7_I_6	Tilly	Accommodation	Low-income	Brazil	Pardo (Mixed)	//	worried/ sceptic	20-Jul	17	Portuguese
8_I_20	Colin	Food & Drinks	Low-income	Brazil	Pardo (Mixed)	Camera		01-Aug	35	Portuguese
9_I_13	Patty	Accommodation	Higher-income	Brazil	Branco (White)	Camera		28-Jul	27	Portuguese
10_I_31	Caroline	Food & Drinks	Higher-income	Brazil	Pardo (Mixed)	Camera		12-Aug	12	Portuguese
11_I_17	Freddy	Activity	Higher-income	Brazil	Preto (Black)	Camera		31-Jul	55	Portuguese
12_I_29_1	Bridget	Food & Drinks	Poor-income	Brazil	Preto (Black)	Camera		11-Aug	67	Portuguese
13_I_19	Amy	Accommodation	Higher-income	International	Branco (White)	Whatsapp	easier	01-Aug	68	English
14_I_4	Theo	Accommodation	Higher-income	International	Branco (White)	Whatsapp	easier	11-Jul	53	German
15_I_3	Oscar	Accommodation	Low-income	Brazil	Pardo (Mixed)	Whatsapp	easier	11-Jul	20	Portuguese
16_I_11	Anna	Accommodation	Higher-income	Brazil	Branco (White)	//	no time	27-Jul	37	Portuguese
17_I_1	Tony	Accommodation	Higher-income	International	Branco (White)	Whatsapp	easier	06-Jul	53	German
18_I_22	Leo	Accommodation	Low-income	Brazil	Pardo (Mixed)	Camera		02-Aug	235	German
19_I_21	Luke	Accommodation	Low-income	Brazil	Preto (Black)	Camera		01-Aug	50	Portuguese
20_I_16	Berti	Food & Drinks	Low-income	Brazil	Preto (Black)	Camera		29-Jul	20	Portuguese
21_I_27	Otto	Food & Drinks	Low-income	Brazil	Pardo (Mixed)	Camera		10-Aug	43	Portuguese
22_I_2	Adam	Accommodation	Low-income	Brazil	Pardo (Mixed)	Whatsapp	easier	07-Jul	40	Portuguese
23_I_5	Ryan	Accommodation	Higher-income	Brazil	Branco (White)	//	no time	15-Jul	44	English
24_I_23	Henry	Accommodation	Higher-income	Brazil	Branco (White)	//	no time	02-Aug	32	Portuguese
25	Agatha	Shopping	Poor-income	Brazil	Pardo (Mixed)	Camera		n/a [had to travel]	n/a	n/a
26_I_12	Franklin	Not (directly) in tourism / expert	No direct	Brazil	Branco (White)	//	n/a	28-Jul	37	Portuguese
27_I_29_2	Nathan	Not (directly) in tourism	No direct	Brazil	Preto (Black)	Whatsapp		11-Aug	67	Portuguese
28_I_33	Anton	Not (directly) in tourism	No direct	Brazil	Preto (Black)	Camera		17-Aug	10	Portuguese
29_I_7	Audrey	Not (directly) in tourism / expert	No direct	Brazil	Branco (White)	//	n/a	20-Jul	68	Portuguese
30_I_8	Matthew	Accommodation / expert	Higher-income	Brazil	Branco (White)	//	n/a	22-Jul	80	English
31_I_18	Dawn	Not (directly) in tourism	No direct	Brazil	Pardo (Mixed)	//	no time	31-Jul	26	German
32_I_9	Emil	Activity	Poor-income	Brazil	Preto (Black)	//	no time	23-Jul	25	Portuguese
33_I_25	Richard	Accommodation	Higher-income	International	Branco (White)	//	no time	04-Aug	57	German
34_I_26	Winnie	Not (directly) in tourism	No direct	Brazil	Pardo (Mixed)	//	n/a	08-Aug	37	English
35_I_29_3	Bruce	Food & Drinks	Low-income	Brazil	Preto (Black)	Camera		11-Aug	67	Portuguese
36_I_15_2	Keily	Not (directly) in tourism	No direct	Brazil	Preto (Black)	//	worried/ sceptic	29-Jul	52	Portuguese
37_I_32	Alex	Shopping	Low-income	Brazil	Preto (Black)	//	no time	14-Aug	22	Portuguese

Table 5-i: Participants' characteristics, photo-elicitation and interview details

Source: Author

After a flexible period of taking the photos[31], the cameras were collected from each participant and developed in a shopping centre in Bahia's capital Salvador. Guillemin and Drew (2010) support a flexible approach to give participants sufficient time for reflection and completion of the task. Once photos were developed, they were returned to the participant and an interview was scheduled with each participant. Some participants looked at the photos straight away and wanted to do the interview, whereas others took some time to reflect on the process and the photos.

Photo-elicitation and interviews

The interviews were conducted in a public place or at the participant's workplace to avoid intrusion and ensure the researcher's safety. The length of interviews varied greatly (from 10 to 235 minutes) due to different reasons[32]. This stage of conducting interviews in a photo-elicitation project *“is vital in clarifying what photos taken by the interviews mean to them; by themselves the photos are meaningless”* according to Rose (2016:321). To start the interviews, participants were asked to talk about themselves (e.g. where did they grow up? if not in Imbassaí, where are they from? when did they come to Imbassaí? do they stay in Imbassaí alone or with family?), before asking them questions related to the process of taking photos i.e. how they took the photos (e.g. planned or spontaneous) and how they felt. Thereupon, the photos taken by participants were used as *"departure point to understand participants’ perceptions"* (Hatten et al., 2013:3). Participants were asked to choose photos which were most important to them, to have a focussed discussion in a limited time-frame. If there was the opportunity, further photos were included in the discussion. The photos were numbered in order of discussion, which helped combining recording, transcripts of interviews and photos for analysing the data - as supported by Clark-Ibáñez (2007).

The photos were discussed by initiating questions related to the photos such as 'what does the photo show?', 'why did you take it?'. The emerging topics were pursued and developed in the discussion to explore the meaning of the photo in context of the research question. The underlying assumption was that the photo was a representation of 'something' and the researcher can only develop understanding of the representation by talking to the person who took the photo (Rose, 2016). As such, the participant was tasked to provide an interpretation of the phenomenon being studied. After discussing the photos, that were taken and that could not be taken, as

[31] Some participants took 3 days, others up to 3 weeks.
[32] In one case, for example, only 6 photos were good enough, the others were too dark, so that the participant wanted to take new photos with her phone; however, because of time-constraints, she couldn't do so. Because of this only a short interview was conducted, when returning the photos.

suggested by Hodgetts et al. (2007b), the interview focus moved to more specific topics relating to the research objectives, if participants were interested in a further discussion[33]. To do so, a semi-structured approach was used to further uncover perceptions of tourism development. Questions were based on an interview guideline (see: Appendix 11) that was carefully designed, agreed with the supervisory team and approved by the university's ethics committee in advance. The interview guideline was slightly adapted for each interview to respond to each individual participant[34]. The same semi-structured approach to interviewing following the guideline was used with participants who were not involved in taking photos.

To ensure reliability of participants' responses, their answers were triangulated. For example, some participants communicated their perceptions on the influence of the local Commercial Association or the level of safety and security in the destination. These perceptions were used in other interviews to investigate other perspectives as to what extend these might correspond or differ, which links to underlying assumption of this study that there is not 'one right answer', instead multiple perspectives exist (see: Section 5.3. Research Approach). To ensure understanding of participants' answers, these were summarised by the researcher in her own words during the interview, so that the participant could explain his/her comments, in case there was a misunderstanding. This was particularly useful considering that interviews were conducted in three languages - in Portuguese, English and German. Although the researcher is fluent in all three languages, it contributed to accuracy in understanding and interpretation. To enable accurate transcription, interviews were recorded using a digital voice recorder.

[33] Discussing further topics might change power dynamics of the interview, in that the researcher resumes the lead in the interview. However, in this study, changing dynamics did not seem to have an influence, since a relationship between researcher and interviewee has already been established.

[34] Due to the diversity of participants, for example, in terms of qualification and role in the tourism value chain, it was essential to use the questions as a flexible guideline. For example, a member of an association has more knowledge on how the association works and who else is involved in tourism development; whilst an individual craft seller, who is not part of an association, can only provide an outsider's perspective. Furthermore, in interviews with individuals, who took the role of an expert, the emphasis of the interviews was to gather in-depth insights into general aspects of tourism development instead of developing understanding of how tourism influences their lives.

Diary

During the second fieldwork visit, a diary using a notebook was written since it was perceived to be beneficial after the first fieldwork visit (see: Figure 5-8).

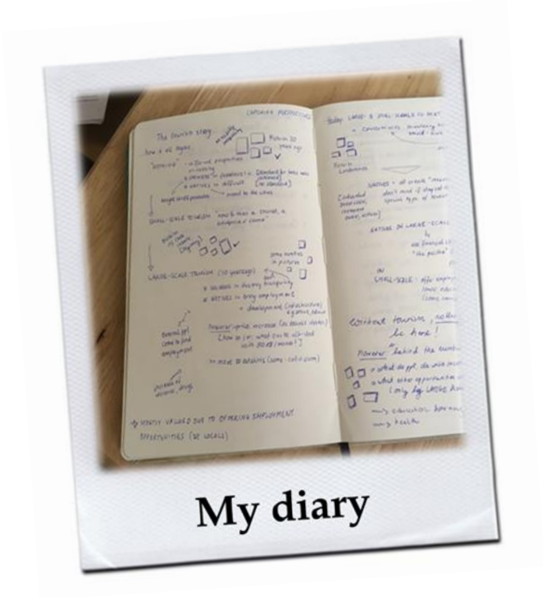

Figure 5-8: Diary
Source: Author

It includes activities, meetings and conversations with people, thoughts and feelings, and furthermore, reflections on the research topic, issues that need to follow-up and ideas on how to present results.

5.7.1.3. Ethics

According to the Economic and Social Research Council (ESRC, 2015:8, 10) using visual methods involves *"more than a minimal risk"* that ethics guidelines might be breached, in a way that the principle of anonymity is not respected i.e. *"participants or other individuals may be identifiable in the material"*. To address all ethical implications of this study, four factors for applying visual methodologies suggested by Wiles, Clark & Prosser (2011) were considered carefully in advance and followed accordingly.

1) Anonymity and consent

Photo-elicitation and interviews were carried out overtly i.e. the researcher introduced herself as a researcher, explaining the research aim and objectives to participants, and asking for consent (Zikmund, 2009). Participants received an information sheet (see: Appendix 9) and were asked to sign on a consent-form that ensures that they give consent to participate in this study, to use the information provided and photographs taken, once anonymised, for research outputs (see: Appendix 10). In case participants were illiterate, the documents (information sheet and consent form) were read out to them. Real names were not used to protect the identity of participants, and photographs were anonymised (see: Section 5.7.2. Data analysis).

Confidentiality and anonymity were paramount for the researcher – to ensure both for storing, analysing and presenting the data, a data management plan (DMP) was developed and approved (see: Appendix 12, DMP 2).

2) Law and copyright

In visual research, it is important to consider copyright i.e. ownership of a specific visual image. In general, a person who took the image is the owner (Rose, 2016). Accordingly, since in this study photos were taken by research participants, they are the copyright owners. Thus, participants were asked for consent to reuse the photos in publications and presentations - as suggested by Barker and Smith (2012). Reviewing ethical issues in visual research, the National Centre for Research Methods (NCRM, 2008:18) confirms that *"copyright can be managed relatively easy with negotiation with the research participant and, with their agreement, signing of a consent form".* The designed consent form addressed the reproduction of participant-generated images (see: Appendix 10).

While it is manageable to seek consent from all research participants, it is a more complex issue to receive consent of people, who are potentially shown on images (NCRM, 2008). Accordingly, participants were briefed that, when people can be identified on photos, they need to explain the purpose of taking the photos and ask for consent. Participants were asked to provide confirmation in the consent form (see: Appendix 10).

3) Frameworks and ethics committees

To ensure conformity with the SHU Research Ethics Policy, the Research Ethics Checklist (SHUREC1) and the Application for Research Ethics Approval (SHUREC2a) were completed for the second fieldwork visit and approved.

4) Individual moral framework

Applying photo-elicitation in a participatory approach, it was sought to overcome power imbalances. The researcher feels highly committed towards everybody who participated in the study and seeks to ensure that participants were and are not harmed in any way.

5.7.2. Data analysis

To analyse the qualitative data gathered in photo-elicitation and interviews, a rigorous 3-stage process involving transcribing and familiarising, coding and theming was followed (see: Table 5-j). Each stage is explained in the following.

Stage		Reference
1	Familiarising and transcribing	Robson (2011)
2	Coding	Saldana (2016)
3	Theming	

Table 5-j: 3-stage process of data analysis
Source: Author

Stage 1: Transcribing and familiarising

The stage of transcribing the interviews started, whilst collecting data in the destination (as mentioned earlier). Before returning to Sheffield in August 2017, 10 interviews were already transcribed. To transcribe, the researcher listened to recordings on Windows Media Player and used a simple table-format in Microsoft Word. In the interview transcript reference was made to photos enabling identification of participants' explanations of why they took the photo and what the photo meant. Accordingly, interpretation and analysis of photos was done by participants - not by the researcher. The researcher considered photos and interview transcripts as one set of data, which is supported by Guillemin and Drew (2010:184) in arguing that *"images and interview data are seen as inextricably linked, requiring simultaneous and not separate analysis"*.

Overall, transcribing the interviews was a time-consuming process. Bryman's (2004) assumption that the transcription of one-hour interview takes approximately five to six hours could only be achieved, when the participant spoke clearly without a strong accent. However, in particular, transcribing interviews in German and Portuguese were more difficult, because both, German- and Portuguese-speaking participants, often had a strong accent. However, in all cases, using electronic software for transcription was not an option, because the software tools lacked quality in the translation.

Interviews were transcribed in the language the interview was conducted and not directly translated into English. It was felt that a direct translation might have weaknesses in terms of accuracy of meaning, which would have negatively influenced the trustworthiness of data (Edwards, 1998). It was planned to translate all interviews into English; however, considering time constraints, it was agreed by the supervisory team to analyse the data using the original transcription. Only quotes that were used in the thesis were translated: the author translated the original quote, but both, original and translated quote, were kept in the draft of the thesis. To overcome challenges in cross-language qualitative research, particularly in translation, scholars suggest to get a third person (e.g. translator, interpreter) involved (Nes et al., 2010; Squires, 2009). Using the method of parallel translation, the used quotes were translated by a Portuguese native speaker who is also fluent in German and English, compared with the researcher's translation and a final translation was created - thus, contributing to accuracy of translation and ensuring trustworthiness of data.

In each interview, key topics were highlighted and several comments related to potential codes and themes, to the use of language, and to general experiences were made. Thus, during the process of transcribing, familiarisation with the data took place - which is crucial for the whole analysis (Braun & Clarke, 2006; Robson, 2011). After completing the stage of transcribing, all interview transcripts were uploaded to NVivo - which has, for example, been suggested by Robson (2011) to manage the large amount of data and facilitate a more focused analysis. To represent the different socio-economic groups, interviews were uploaded into separate folders ('higher-income (than minimum salary)', 'poor-income', 'low-income' and 'no (direct) tourism income'). Separating the data for the different determined socio-economic groups enabled coding and analysing the interviews to support data complementarity between Part 1 and Part 2 of this study and to obtain a rich picture of the relationship between poverty, inequality and power relations in a tourism context from the perspectives of different socio-economic groups (see: Section 5.3. Research approach).

Stage 2: coding

The process of coding might be data-driven or theory-driven; however, in practice *"a blurring of approaches might take place"* (McIntosh-Scott, Mason, Mason-Whitehead, Coyle, 2013:219). To analyse the data, it was sought to generate the codes from the data - this was, however, bound by the research aim and objectives. Thus, in line with McIntosh-Scott et al. (2013), both approaches were utilised in this study.

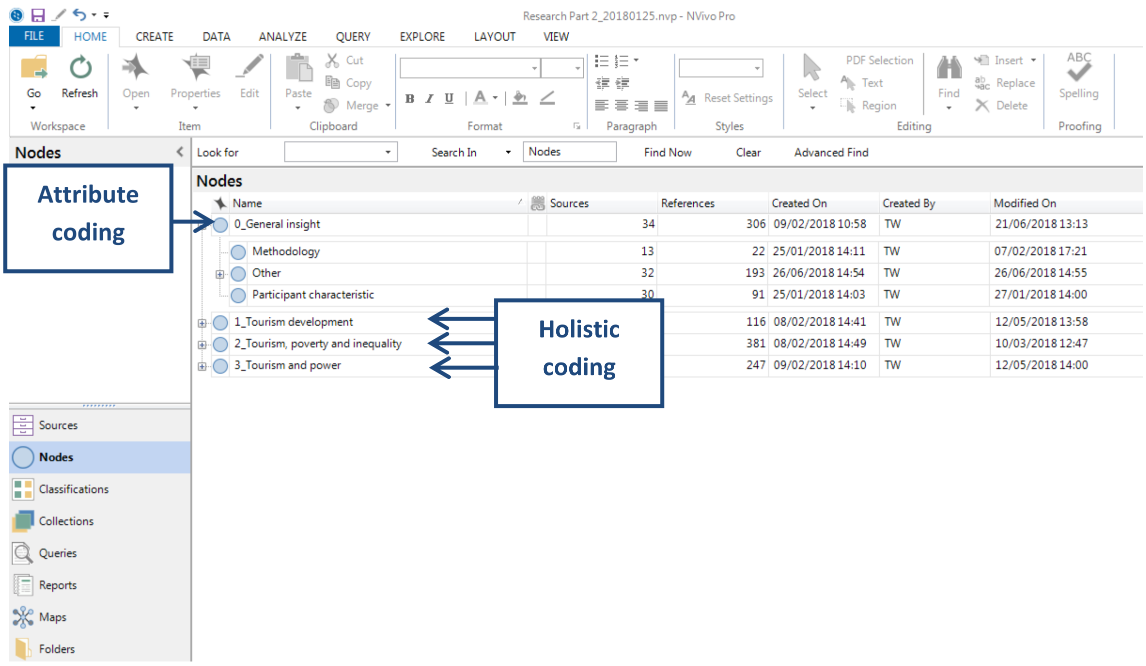

Figure 5-9: 1st cycle coding
Source: Author

The process of coding (in NVivo) involved two main cycles: the first cycle was aimed at getting a better overview of the data, whilst the second cycle intended to develop more specific codes.

In the first cycle (see: Figure 5-9),

- 'attribute coding' was used to identify, on the one hand, participant characteristics, and on the other hand, to gather participants' views on the chosen the methodological approach (Saldaña, 2016); and
- 'holistic coding' was undertaken in order to separate the data into smaller parts related to the broad themes of the study (Saldaña, 2016).

According to Saldaña (2016), both methods are used at the beginning of analysing a data set to prepare the data for more detailed analysis. Dey (1993:104) confirms that holistic coding seeks to *"grasp basic themes or issues in the data by absorbing them as a whole"*.

After this cycle, all holistic themes were printed and 'initial descriptive coding' (see: Saldaña, 2016) was undertaken to determine an appropriate framework of coding. Tesch (1990:119) points out that *"it is important that these [codes] are identifications of the topic, not abbreviations of the content. The topic what is talked or written about. The content is the substance of the message"*. In the context of this study, a participant, for example, explained that tourism improved the financial situation of the native population, because tourism brought many jobs to the region [content] addressing the value of tourism development for the population [topic]. Another participant, for example, talked about the bike he bought from his income [content] which was coded under consumption [topic]. Accordingly, in this study, codes were defined to represent reoccurring topics.

In the second cycle, after feeling comfortable with the initial coding framework using a hardcopy, 'descriptive coding' was carried out in NVivo to identify reoccurring topics within the holistic themes. Descriptive coding involved an iterative process of going 'back and forth' until a final network of codes emerged. It needs to be acknowledged that the depth of coding varied, in that, for example (see: Figure 5-10), under the holistic theme Tourism, poverty and inequality,

- 'Job & income' and 'Consumption' represented codes at the 1st level, whilst
- codes can also be found at the 4th level e.g. 'Education', 'Health care', 'Supermarkets'.

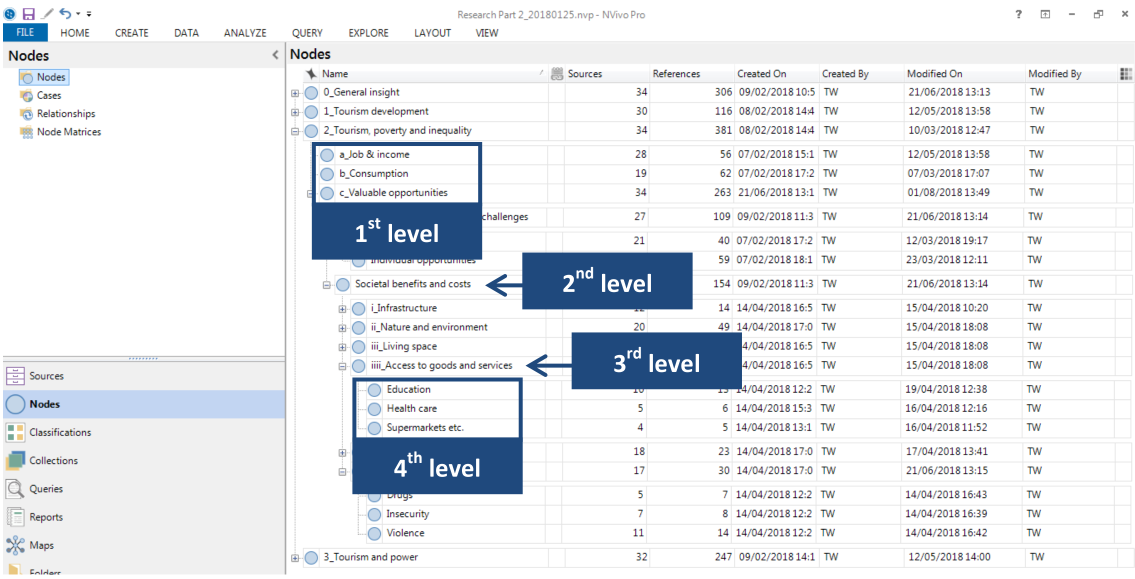

Figure 5-10: 2nd cycle coding

Source: Author

In the last stage, these reoccurring topics [=codes] were further themed within each holistic theme (see: Stage 3. theming).

Stage 3: theming

Themes can be identified at the manifest or latent level i.e. directly observable or underlying in the information provided by participants (Boyatzis, 1998). At manifest level, a theme serves to categorise a set of data, while at latent level, themes intend to capture a phenomenon (Auerbach & Silverstein, 2003; Saldaña, 2016). In this study, themes were identified at the manifest level, in that codes were categorised under a theme. Accordingly, for example, the codes 'Education', 'Health care', 'Supermarkets' (at 4th level) were themed under 'Access to goods and services' (3rd level); all themes of the 3rd level e.g. 'Access to goods and services', 'Living space' were further aggregated under the theme 'Societal benefits and costs' (2nd level) and then located under 'Valuable opportunities' (1st level). After a long iterative process of reflecting on participants' messages and reviewing codes, a network of themes was established (see: Figure 5-11). The findings are presented in Chapter 7.

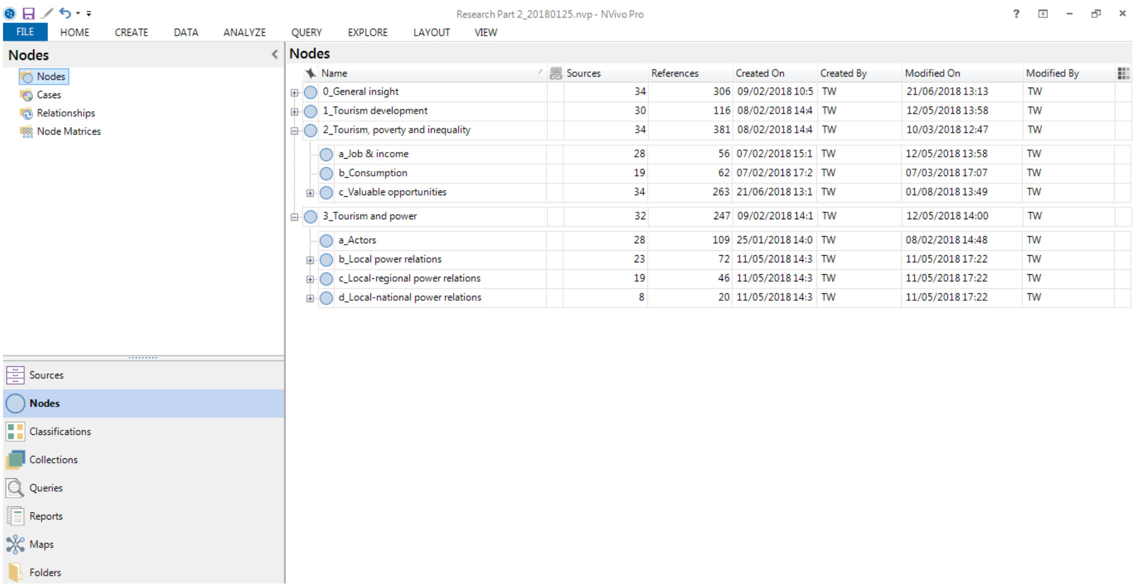

Figure 5-11: High-level network
Source: Author

5.8. Critical reflections

The fieldwork visits were accompanied by writing a research diary, which was valuable experience for me to reflect on the research approach, the value of the methods and particularly, on my own positionality of being a white female researcher with a postgraduate degree from a European background. Thus, I believe that writing a research diary strengthens the fieldwork process and output, particularly, when conducting a critical study since it responds to the need for researchers to have critical awareness.

5.8.1. Research approach

This study was based on sequential triangulation - as discussed in Section 5.3. Research approach. Applying this approach was not only crucial for achieving the objectives of the study; however, also enabled critical reflection on the relationship between as the researcher and research participants, which is crucial when conducting a critical study, and on my professional development as a researcher.

Although I travelled several times to the research location, I was still perceived as an outsider during the first fieldwork visit in February/March 2017. The first fieldwork visit intended to conduct VCA with tourism business owners and managers to produce quantitative data on revenue and income flows. Tourism business owners and managers are mainly people from a white background (i.e. white Brazilians, white Europeans and other white) who moved to the Northeast - thus, the participants and I shared similar characteristics which facilitated a more equal relationship. I believe that, on the one hand, I was considered an insider of the group of white Europeans, but, on the other, I was still perceived as an outsider to the destination who does not have any affiliations with institutions or individuals.

During the first fieldwork visit, I had the chance to strengthen my research skills, for example in terms of communication by approaching potential participants, asking them for interest in participating in this study and conducting the interviews. It was a new and challenging task for me, which was particularly challenging, because I mainly spoke Portuguese - a language, I do not use daily and thus I am less comfortable with than English or German. However, after some time, I became more confident and the process became more natural. I believe that these are normal challenges most early-career researchers are faced with, and it was important to overcome these to be able to conduct strong research. Therefore, in my opinion, the first fieldwork visit helped me to develop and strengthen my research skills and prepared me for the second fieldwork visit. In particular, in the time between both fieldwork visits, I had time to reflect on and adapt the design for the qualitative study (Part 2).

Sequential triangulation was also valuable for establishing contacts and relationships with research participants for Part 2 comprising different socio-economic groups (poor-income, low-income and higher-income (than minimum salary). Whilst business owners and managers (higher-income) and I shared similar characteristics, I had a position of an insider to some extent. Spending time in the destination and having informal conversations with locals from poor-income and low-income backgrounds enabled developing trust and facilitated greater openness to participate in the qualitative part of the study and share opinions, feelings and experiences with me. Jobbins (2004) emphasises the importance of building social relationships and developing trust between the researcher and research participants to get valuable insight. By building relationships based on mutual trust, power differentials that 'naturally' exist between the researcher and research participants were balanced. Secondly, these strong relationships deepened my personal commitment towards participants' well-being. Reflecting on this, I am confident that the depth of my research was greater than it would have been without having established these relationships. In addition, I approached people who I did not know beforehand and asked for participation (e.g. a waiter in a pousada, a beach hawker, an expert) and some people volunteered to participate in the research project after hearing about it. Because people showed interest in participating based on other people's word of mouth, I believe that participants felt that they were treated with fairness and respect, which made them feel comfortable to participate and even encouraged others to do so. Thus, I am confident that in Part 2, I was no longer perceived as a 'full' outsider to poor-income and low-income groups, but became more and more an insider (despite having different racial backgrounds).

5.8.2. Research methods, data collection and analysis

Value chain analysis

The method used in the first fieldwork visit was value chain analysis (VCA). The evidence showed that using VCA was beneficial, in that it provided standard questionnaires, a structured approach based on steps and activities and a guideline recommended by the International Trade Centre (ITC) (see: Ashley et al., 2009). Thus, I could rely on a method that has been tested by practitioners in the field, which helped to be confident with design and execution of this research. However, despite guidelines and questionnaires being available, both lacked clarity - for example, there was no clear guidance on the sampling technique and required sample sizes, and there were no clear definitions (e.g. 'skilled', 'semi-skilled' and 'unskilled work') included (see: Table 5-k). In particular, the process of translating the questionnaires into Portuguese helped to discover content-related issues. To achieve clarity, I contacted practitioners, asked for advice and received prompt feedback. Although it was necessary to translate questionnaires and contact practitioners to achieve clarity, I believe that the process was time-efficient since otherwise it would have taken much longer to design each questionnaire for actors in the tourism value chain and for the tourist survey on my own.

Applying the standard VCA framework was beneficial, in that by emphasising this (i.e. the application of a standard framework) to participants, they were more willing to get involved in the survey. Furthermore, being an outsider to the local tourism industry, although sharing similar characteristics with business owners and managers, increased my integrity as a researcher in keeping the information confidential, which contrasts with Bulmer's (1993) argument that, particularly in developing countries, issues of trust are frequently connected with suspicion towards researchers 'from outside' and a potential misuse of information. In this study, having no affiliations with public institutions proved to be advantageous since participants frequently communicated a high-level of mistrust towards these.

This is also emphasised in the guidelines by stating that

> *"managers will only disclose it if they have credible reassurances that the information will not be relayed to local authorities or to their competitors and that the study can generate changes that are in the interests of the hotel. This is one part of the study process, which sometimes does not benefit from the presence of local stakeholders – it is sometimes actually a benefit to be an external researcher"* (Ashley et al., 2009:28).

I strongly believe that if public institutions had been involved in conducting VCA, the information provided by tourism actors (e.g. cost overview) would have been less accurate, for example, they would have communicated smaller numbers, because they were worried that information would be forwarded to public institutions, which could potentially have resulted in paying higher taxes (as pointed out by participants).

Although I could not rely on a larger team for data collection, I believe that the process was time-efficient. While larger teams are able to fully analyse the data during the fieldwork visit, I could not do so because my full focus was on collecting the data. Nonetheless, I do not consider this as a limitation, because I had the possibility to contact participants afterwards in case questions would come up. After analysing the data, results and suggestions were shared with local stakeholders (e.g. President of the Commercial Association, a Hotel Manager), although this was not part of my research objectives. Thus, VCA provided the opportunity to identify intervention strategies to improve the impact of tourism on the local economy (see: Appendix 1).

Nonetheless, the accuracy of quantitative results gathered through VCA, should be questioned, because, firstly, many participants 'simply' do not know the occupancy rate or the average number of dishes they serve a day and they do not care as long as they have some money left at the end of the day. Secondly, the required sample sizes are relatively small - thus, questions related to the generalisability of results arise. Thirdly, since guidance on calculating the impacts is limited, external validity is weakened. Therefore, the quantitative results are largely based on estimates by participants and also by researchers to accomplish the calculation. Although I am sceptic about the actual numbers, I believe conducting VCA was highly valuable for achieving insight into the local tourism value chain, its actors and wider issues and challenges. Having this knowledge was crucial since it did provide the foundations for understanding the complexities that were discovered in the qualitative research.

	Strength	Weakness
APPROACH & QUALITY of QUESTIONNAIRES	+ **Standard pro-poor VCA framework and associated guidelines are available** (e.g. Ashley *et al* , 2009)	- **A standard pro-poor VCA framework does not mirror the uniqueness of each destination**
	+ **Comparison among different studies can be facilitated**	- **To mirror the uniqueness of destination in the approach, much preparation time is involved (e.g. pre-visits to the destination, adaptation of questionnaires)**
		- **Questionnaires cannot mirror the full complexity e.g. diversity of prices during the year; seasonal staff does not play a role, although tourism relies on seasonal support**
		- **Ensuring standard conduction is difficult, particularly if a team is involved, due to imprecise descriptions e.g. semi-skilled vs. unskilled staff**
		- **Comparison among studies is difficult due to their different purposes and foci, different location and type of tourist**
		- **Research is** only **carried out with people involved in tourism & dominantly with owners and managers - not with 'the poor' (or: defined target groups)**
		- **Data about households is not collected - it makes a difference if tourism-related income 'at the (poverty/ low income) line' needs to feed one person or a family; or if the person has another source of income alongside tourism employment**
		- **The required sample size is small [> impact on validity]**
		- **Distribution of economic impacts is not taken into consideration**

	Strength	Weakness
DATA COLLECTION & QUALITY of DATA and RESULTS	+ **Application is relatively easy due to standard framework being available**	- **Honesty of participants (e.g. in terms of revenue) can be questioned - in particular, if governmental organisations are involved [> impact on reliability]**
	+ **Process of data collection is neither time-consuming nor cost-intensive**	- **Incorrect answers - some participants, particularly if the business is small, do** simply **not know about required data (e.g. occupancy rate, no of restaurant customers) [> impact on reliability]**
	+ **Availability of data (e.g. tourism actors, tourist spending) is improved** (in particular, if there was no data available before)	- **Calculation of the monetary impact depends on a range of estimated variables - in particular, if participants could not/did not want to provide the correct data [> impact on validity]**
	+ **Monetary impact of tourism on target groups can be identified**	
	+ **More effective strategies to improve quality of the destination and improve tourist experience can be defined**	
	+ **Intervention strategies to improve monetary impact for target groups can be defined**	

Table 5-k: Reflection on strengths and weaknesses of VCA
Source: Author

Photo-elicitation and interviews

In the second fieldwork visit (Part 2) photo-elicitation and interviews were employed to gather rich information about the relationship between tourism, poverty and inequality in the Northeast of Brazil from diverse perspectives. It emerged from the data that, for example, wider societal benefits and costs of tourism development seemed to be of higher importance for participants than individual opportunities and challenges, since participants took predominantly photos of these and thus put emphasis on their value (see: Section 7.3.2. Valuable opportunities). I believe that discovering such nuances and values would have not been achieved using only interviews. Although photo-elicitation is considered a useful method for exploring social relations, participants of this study rarely presented these in their photos. Therefore, in the context of this study, it was relatively difficult to explore social difference and hierarchy by solely relying on the photo material. Why participants did not portray these is difficult to answer - 'Did ethical guidelines (e.g. consent form) for taking photos play a role?', 'Although a relationship between researcher and research participant was established, was even deeper trust required?', 'To what extent might (lack of) awareness might have influenced this?', and 'What about the broad approach of giving instructions in the initial briefing?'.

Every photo-elicitation process starts with an initial briefing with participants, which according to Rose (2016:320) is essential for the researcher and the research participant to *"meet and establish some initial trust"*. From my experience, however, it was difficult to encourage people to participate in the photo-elicitation, if a relationship has not already been established. For example, while one beach hawker did not participate, although he was interested, because he was worried of taking personal photos, another beach hawker I knew from my first fieldwork visit, gladly participated. Thus, I believe to conduct photo-elicitation, trust between the researcher and the research participant is key, which is challenging to build in a short initial briefing.

Intentionally, instructions in the initial briefing were left broad, so that participants were not directed by my assumptions of how tourism influences their lives. As a consequence of this open approach, the number of photos, that provide richness to specifically answer the research questions, was limited. I think it is a decision every researcher using photo-elicitation has to make: either focussed instructions and targeted photo material or open instructions and broad photo material. For this critical study, the latter choice was essential as participants were in charge and thus enabled discovering themes from their perspectives - instead of being influenced by my ideas. From my experience during this project, however, it was difficult for participants to overcome this mental barrier fully (in other words, to ignore what the researcher might want to see) since some participants still seemed to have considered the researcher when taking photos.

When collecting the cameras, participants told me that they enjoyed taking the photos and the fact that other people asked if they could participate, makes me think that it was a fun exercise. In this way, I believe photo-elicitation engages participants more effectively. Some participants articulated that especially using a disposable camera made them think more carefully about the photos they wanted to take and made them revalue the local environment in which they work. Therefore, I believe that using disposable cameras was sensible for this study. However, it needs to be acknowledged that employing predominantly disposable cameras instead of personal cameras/phones, made the photo-elicitation more expensive and time-consuming. First of all, I had to buy the cameras, which were relatively cheap; however, developing the films was quite expensive. Since using non-digital cameras and developing films have become outdated, it was very difficult to find a shop to get the photos developed. Once I found one shop (90km away from the research location), developing the photos took quite a while (2 weeks). Alongside cost- and time-constraints, the quality of photos from disposable cameras was lower than photos taken with cameras/phones.

Participants did not have an issue with the quality - instead, I think, the majority of participants were happy with their output. Quite often, when I returned the photos, participants showed the photos to other community members, who congratulated them. Once, I returned the photos to a beach hawker, in the public, he looked at them straight away and after a few minutes different people stood around us to look at the photos and commented: 'que bom. lindo' (how nice. beautiful). When discussing the photos in the interview, I emphasised how great the photos are and how helpful these are for my study. In this way, photo-elicitation can be used as a tool to support participants in developing and strengthening their self-confidence.

The interviews were conducted in a public place or at the participant's workplace. Considering that power relations particularly exist at the workplace, this was not an ideal place to discuss these; however, due to the university's requirements on researcher health and safety, interviews could not be carried out at participants' homes. In one case, an interview (Leo, 18_I_22) with an employee in a pousada was scheduled at the workplace; once power became a topic in the interview, he suggested moving the interview to a different place since he wanted to express issues of power between white tourism business owners (i.e. his boss) and non-white locals employed in these businesses. Furthermore, considering power dynamics between the researcher and the participant, my 'not-perfect Portuguese' was beneficial, in that participants did not view me as the white, well-educated researcher - instead they felt that they supported me improving my language skills. Thus, it enabled constructing a more equal relationship and open communication. Participants opened up considerably, so that sometimes it was difficult for me to comprehend their harsh realities involving corruption, violence, racism and fear.

The photo-elicitation involved 24 participants and further 13 participants engaged in interviews (in both cases, from different socio-economic groups different tourism nodes/sectors) to respond to issues of transferability. Nonetheless, a smaller sample would have allowed closer interaction with the participants, particularly with those involved in the photo-elicitation project, which could have enabled more in-depth insight. Transcribing all interviews started whilst being in the destination (July 2017) and continued until December 2017. Thus, it was a long process, which was, however, highly valuable since I was able to familiarise myself with the data, so that by the end of transcribing, I had extensive knowledge of each interview. Although this should have helped me with the coding exercise, I still experienced difficulties with coding, particularly, due to the different nature of codes (e.g. attributes, content, feelings). Only after reading about the different areas of coding by Saldaña (2016), I developed a clear concept on how to code the data. Originally, I planned to analyse the data using Robson's (2011) five stages of 'thematic coding'[35]; however, since I felt that I was just trying to suit my analysis to Robson's (2011) framework, I decided to use a combination of Robson's (2011) and Saldaña's (2016) suggestions (see: Section 5.7.2. Data analysis).

5.9. Conclusion

This chapter presented the researcher's *"voyage of discovery"* (Kothari, 2004:1) by providing insights into her critical philosophical position, justifying the chosen research approach of triangulation that combined quantitative VCA and qualitative photo-elicitation and interviews in a sequential order and discussing the process of data collection and data analysis. Quantitative VCA was based on a standard VCA framework that was developed under the guidance of the International Trade Centre (ITC) to measure tourism-related revenue flows and income and to determine socio-economic groups. This information was utilised for sampling participants for the second qualitative part of the study, namely photo-elicitation, based on a six-stage process suggested by Rose (2016) and Guillemin and Drew (2010), and interviews. The qualitative data was analysed by following a rigorous process of transcribing and

[35] Robson’s (2011) five stages of 'thematic coding' involve familiarisation with the data through transcribing (stage 1), generation of initial codes (stage 2), collation of codes to themes (stage 3), development of themes into a thematic network (stage 4) and interpretation (stage 5).

familiarising, coding and theming - which was guided by Robson (2011) and Saldaña (2016). Thus, both, the process of data collection and analysis sought to ensure credibility and transferability of data. To respond to the critical stance of this study, it was accompanied by reflections to understand how pre-assumptions and power dynamics influenced data collection and analysis.

The next two chapters present the results of the study: chapter 6 presents the quantitative results of undertaking VCA in Part 1 of this study; chapter 7 shows the results of Part 2 of this study that was based on qualitative photo-elicitation and interviews.

6. Results - Part 1

6.1. Introduction

This chapter presents the results from undertaking the first part of the methodology, namely value chain analysis (VCA) which relates to Objective 1 of this study. At first, an overview of local tourism industry is provided by describing tourism supply and demand in Imbassaí. Thereupon, the impact of tourism on poverty and inequality is analysed by measuring tourism-related revenue flows and income and by considering race in the context of different income-groups. The chapter closes by providing a conclusion that integrates a definition of socio-economic groups.

6.2. Insights into the local tourism industry

6.2.1. Tourism supply: the local tourism value chain

The local tourism value chain encompassed the following sectors/nodes: accommodation, food and drinks, shopping, entertainment/activities. In each sector, different direct service providers were mapped (see: Figure 6-1).

Figure 6-1: Local tourism value chain

Source: Author

Local transport[36] was available; however, not used by tourists due to the small size of the destination. Local secondary suppliers (e.g. agriculture) for the tourism industry couldn't be identified since products and materials are sourced externally to the local area, mainly from Lauro de Freitas/Salvador. This was mainly due to the low quality of products combined with a poor and not reliable service of local suppliers. Accordingly, backward linkages to other economic sectors in the destination are weak.

Accommodation

In terms of accommodation, 27 pousadas and 2 hotels offering a wide range from basic to luxurious quality, were mapped. The average pousada had 36 beds, and was, thus, much smaller than both hotels (see: Table 6-a). The average price for a pousada was BR$273 (= GBP66) for a double-bed room per night. It needs to be noted that the prices varied greatly depending on high (Christmas and New Year up to Carnival in February) and low season. For example, during Christmas and New Year, the prices could be three times higher than in July/August. As a result of the very short season, the yearly average occupancy rate for pousadas was only 40%. In contrast to pousadas, both hotels reported an occupancy rate of 80% throughout the year at much higher daily rates.

Size	No of beds	No of accommodation
SMALL	**< 20 beds**	**6**
MEDIUM	**20-49 beds**	**17**
LARGE	**50-99 beds**	**4**
VERY LARGE [hotels]	**> 99 beds**	**2**
	ALL	**29**

Table 6-a: Accommodation providers and size
Source: Author

Pousadas offered bed and breakfast (and did rarely include lunch or dinner in their rates) and further service offers for extra cost were limited - only standard offerings such as a bar, tour booking and airport transfer were available. Accordingly, the revenue of pousadas was mainly generated from selling rooms – on average, 90% of

[36] motorcycle taxi

revenue was generated from rooms and 10% from food and drinks. In terms of hotels, one hotel was a luxurious all-inclusive hotel and resort offering all extra services a guest may wish for (e.g. candlelight dinner at the beach) and the second one[37] offered mainly bed and breakfast, and a variety of services and activities for extra cost.[38]

Food and drinks

In terms of the node food and drinks, five main types were identified (see: Table 6-b).

Type	Characteristic	How many?
Bar [Just drinks]	- just serve drinks (alcohol & non-alcoholic) - open late afternoon / evening	**3**
Barraca [Beach bar]	- serve Bahian food and drinks (alcohol & non-alcoholic) - open late morning to early evening	**18**
Individual seller [Food & drinks]	- sell icecream, sweets & nuts, cheese, acaraje - all-day	**17**
Restaurant [Lunch & dinner]	- offer Brazilian style of food - open lunch to evening ("mix")	**16**
Restaurant [Dinner]	- half offers Brazilian and other half international food e.g. Italian, Spanish - open late afternoon / evening	**6**
	ALL	**60**

Table 6-b: Characteristics of food and drinks sector
Source: Author

The bars were medium-scale (approximately 30 chairs) and, located in the centre of the village, visited by locals and tourists alike. The businesses were family-run, so that they did not have an extra impact on local employment. The barracas (beach bars) had become largely standardized[39] in terms of size, food and drink offers and prices, and service (see: Photo 6-I).

[37] According the hotel management, the hotel can be considered as a 3-star; however, it is not officially certified.
[38] Further details cannot be provided due to confidentiality issues.
[39] Original barracas were knocked down in 2013/2014 and new location was built by the municipality which accommodates most of barracas and sanitation services. There are four more individual barracas.

Photo 6-I: Barracas
Source: Author

Furthermore, tourists could buy products from individual sellers at the beach (beach hawkers) selling ice-cream, home-made sweets and nuts, cheese and Acarajé[40]. The municipality 'prefeitura' sought to limit the growth of this informal market by requiring a registration from all hawkers, which involves a small annual fee.

The Brazilian cuisine is for lunch (rather than dinner) – that's why the typical Brazilian/ Bahian restaurants were open for lunch and only partly for dinner, depending on the season. They varied in size (from 25 to 100 chairs) and sales to tourists (from 50% to 80% to tourists). Restaurants that solely offered dinner had a size of 30 to 80 chairs and 70%-80% of their sales are to tourists.

Shopping

About 6 shops in Imbassaí sold clothes (mainly beach-wear) and souvenirs, and 3 stalls sold crafts with each one selling different products (wooden, bast fibre and metallic products). Tourists could also buy souvenirs e.g. bracelets, necklaces, earrings (see: Photo 6-II) from individual sellers i.e. beach hawkers.

[40] Acarajé is a dish made from peeled beans formed into a ball and deep-fried in dendê (palm oil). It is a traditional dish in the state of Bahia.

Photo 6-II: Beach hawker products
Source: Author

To sell the products (mainly at the beach), these hawkers needed to be registered with the prefeitura. All revenue was generated from tourism (see: Table 6-c) – thus, without tourism in Imbassaí, individual sellers would not have any income[41].

Type	No of each type	Sales to tourists
Shop	**6**	**60%**
Craft stall	**3**	**67%**
Individual seller [beach hawker]	**10**	**100%**
ALL	**19**	

Table 6-c: Characteristics of shopping sector
Source: Author

[41] The number of individual sellers is significantly higher during high season

Entertainment/activities

The offer of activities for tourists in Imbassaí was limited (see: Table 6-d) – and often tourists felt that they need to take initiative to learn about 'what is offered' (instead of getting actively directed towards activities).

Type		No of each type	Price per person / per unit
Sports	**- surfing, kayak, stand-up**	**2**	**BR$40/ hour** [GBP9.7/ hour]
Sports	**- horseriding**	**2**	**BR$100/ hour** [GBP24.3/ hour]
Sports	**- bike-rental**	**1**	**BR$14/ hour** [GBP3.4/ hour]
Massage		**2**	**BR$100** [GBP24.3/ hour]
Cachoeira	**- waterfall**	**1**	**BR$2.50/ visit** [GBP0.6/ visit]
Jangada	**- 5 min raft tour on river**	**3**	**BR$2.50/ trip** [GBP0.6/ trip]
	ALL	**11**	

Table 6-d: Characteristics of activity sector
Source: Author

6.2.2. Tourism demand: characteristics of tourists

The tourist survey identified that tourism demand largely builds on the leisure market with 73% of participants indicating that they travel to Imbassaí for holidays, 16% to visit friends and relatives and only 11% are on business and other activities. This mirrored the image of Brazil's Northeast as the typical holiday destination (e.g. Observatorio de Turismo da Bahia, 2017). Furthermore, participants stated that beautiful beaches are most important for an ideal holiday destination. 60% of participants were from Brazil and 40% are international travellers[42] (from Germany, Switzerland and Argentina). In terms of length of stay, it was found that international travellers stay on average 10 days on average, and thus, significantly longer than Brazilian tourists who stay 5 days on average.

[42] The percentage of Brazilian travellers in the destination is likely to be even higher, because the survey was carried out towards the end of the season, when the number of domestic tourists decreases. Thus, in relation to domestic tourists, the percentage of international tourists increases.

Tourists staying in pousadas were largely independent travellers, whilst tourists staying in the large hotel and resort had booked an all-inclusive package[43]. An overview of tourist spending along the tourism value chain (accommodation, food and drinks, shopping and entertainment/activities), separately for independent and package tourists, is shown in Figure 6-2. On average, independent tourists paid GBP33 per night. Alongside spending on accommodation, independent tourists spent approximately GBP11 per day for food and drinks in the destination - in restaurants or at the beach. Relatively little spending took place for shopping and entertainment/activities - potentially due to the limited offer.

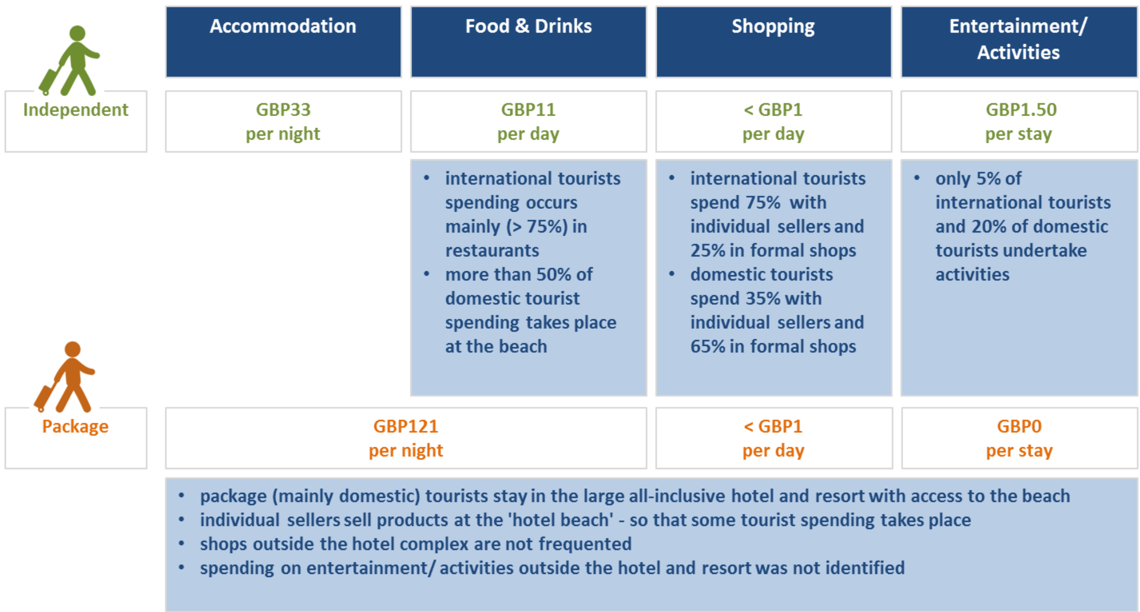

Figure 6-2: Tourist spending

Source: Author

Similarly, package tourists spent very little on shopping and entertainment/activities outside their accommodation since they rarely left the hotel complex to visit the destination centre[44] - firstly, potentially due to the hotel and resort being a village on its own; secondly, due to concerns about safety and security outside the hotel, and

[43] This information is generated through the tourism value chain survey i.e. accommodation owners and managers reported on the type of booking (independent versus package); the tourist survey provided insights into where tourists stay in terms of the name and address of the pousada/ hotel.

[44] This particularly pointed out by a hotel manager responsible for business operations. The manager commented that they would like that tourists, who are all package tourists, leave the hotel complex (e.g. to have dinner in a restaurant outside) since it would reduce the cost for the hotel.

thirdly, because there was not a good link between the hotel complex and the village (e.g. a regular transport services or a path for walking or cycling)[45].

6.3. Tourism, income-poverty and -inequality

6.3.1. Local tourism-related revenue flows and income

Using VCA, it was analysed that approximately GBP54 million enters the local tourism value chain annually[46], whilst GBP52 million (=96%) were generated in the accommodation sector (see: Figure 6-3). Due to both hotels being significantly larger in terms of the number of hotel rooms and beds, having a significantly higher occupancy rate and a significantly higher price, both hotels together were identified to generate 92% of the accommodation revenue. A revenue of GBP2m (=4%) was found to be generated by the three remaining sectors together (food and drinks, shopping, entertainment/activities). The revenue of GBP1.7m in food and drinks resulted from spending of independent travellers (as illustrated in the previous section).

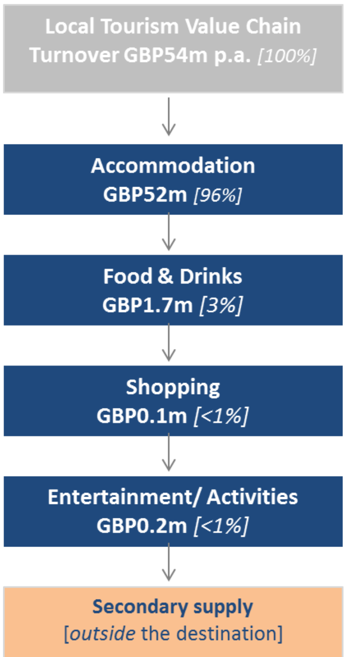

Figure 6-3: Local tourism-related revenue flows
Source: Author

[45] Package tourists could drive to the destination centre or walk along the beach.
[46] Economic leakage was not considered in the analysis

Since secondary supply was imported from outside of Imbassaí (as mentioned in Section 6.2.1. Tourism supply: the local tourism value chain), tourist spending did not remain in the destination.

To examine how much reaches the defined target groups, the upper middle-income international poverty line of US$3.20 per day per person (= BR$527.76 per month per person) was applied to measure pro-poor income, in that people below this level of income were considered as part of the poor-income group. People who earned between BR$527.77 and the minimum salary of BR$931.20 per month was considered as low income (see: details in Section 5.6.2.2. Tourism value chain survey analysis).

The impact of tourism on the poor-income group i.e. below the poverty line of BR$527.76 per month per person (see: Figure 6-4) resulted mainly from micro-entrepreneurship (i.e. individual sellers) in food and drinks, shopping and entertainment/activities.

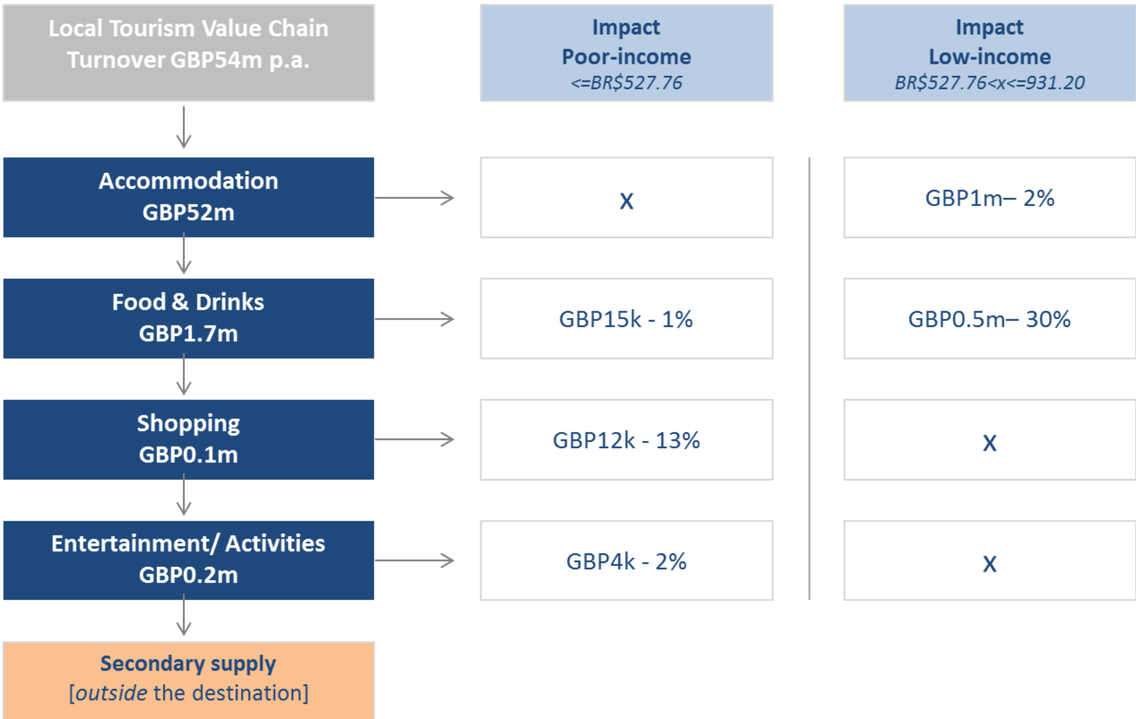

Figure 6-4: Income for target groups

Source: Author

The low-income impact of the accommodation sector was GBP1 million in absolute terms - resulting from employment at minimum salary in the large-scale hotel and resort as well as in smaller direct accommodation service providers i.e. pousadas. In absolute terms, the food and drinks sector provided (through employment at minimum salary in barracas and restaurants) half of the low-income impact (=GBP0.5m) the accommodation sector provided (=GBP1m); in relative terms, however, the impact of the food and drinks sector on low-income was 30% (of the overall food and drinks turnover), while the impact of the accommodation sector on the low-income group was only 2% (see: Figure 6-4).

6.3.2. Income groups and race

Both hotels were foreign-owned: the luxurious large-scale all-inclusive hotel and resort was part of a Spanish hotel chain and the second one had a Portuguese owner. Superior positions were dominantly taken by white Europeans and/or white Brazilians. In terms of pousadas, these were owned either by white Europeans (e.g. from Germany, France, Portugal, Italy), white Brazilians from the South or Other white (e.g. from Argentina). The most frequent job role associated with low income positions in the accommodation sector was described as 'Serviços Gerais', which combines all semi- and unskilled roles (e.g. cleaner, waiter). The majority of these jobs (92%) were filled with local people (i.e. live within a radius of 30km), who had a non-white background (Preto or Pardo), or are from within Bahia (8%).

In terms of the food and drinks sector i.e. in barracas and restaurants, people who received a minimum salary mainly work as cooks or waiters. Similarly to the accommodation sector, they were mainly from the local area and have a non-white background (Preto or Pardo). Barracas and restaurants for lunch and partly for dinner were family-run by local people from a Preto- and Pardo-background. In contrast, restaurants that solely offer dinner were owned by White foreigners (e.g. from Italy, Switzerland, Argentina, Spain), employing non-white locals.

As mentioned before, the pro-poor impact in food and drinks, shopping and entertainment/activities resulted mainly from micro-entrepreneurs (i.e. individual sellers), who had a non-white background (Preto or Pardo).

6.4. Conclusion

This chapter presented the results from conducting VCA. At first, tourism supply and demand in the destination was described and an assessment of tourism-related revenue flows and income was provided. It was found that the poor-income impact of tourism results mainly from micro-entrepreneurship in food and drinks, shopping and entertainment/activities. The low-income impact was generated through employment in the accommodation and food and drinks sector. Analysing the local tourism value chain in terms of socio-economic factors (income and race), it was found that poor-income and low-income positions were often filled by non-white Brazilians (Preto and Pardo) who were from the Northeast. In contrast, tourism business owners and superior/managerial positions were occupied by people from a white background (i.e. white Brazilians, white Europeans and other white) who moved to the Northeast. In accordance with these findings, socio-economic groups were defined for the purpose of this study (see: Table 6-e).

Socio-economic group		Income [in BR$ per month]	Race	Tourism job role / position
A	**poor-income**	**<= 527.76**	**Preto- & Pardo Brazilians**	**Micro-entrepreneurs**
B	**low-income**	**527.76 < x <= 931.20**	**Preto- & Pardo Brazilians**	**Serviços Gerais, waiter, cook, cleaner**
C	**higher-income** [than minimum salary]	**> 931.20**	**White Brazilians, White Europeans & Other White**	**Tourism business owners & managers**

Table 6-e: Socio-economic segmentation of tourism-related income receivers
Source: Author

The next chapter presents the results of the second part of this study that was based on qualitative photo-elicitation and interviews. Using quotes and participant-generated photos of the identified different socio-economic groups, tourism development, the relationship between tourism, poverty and inequality, and the influence of power relations are explored.

7. Results - Part 2

7.1. Introduction

This chapter presents the study's results illustrating participants' perspectives through the use of quotes and participant-generated photos, which were gathered in the second part of this study. At first, perspectives on tourism development over the past 25 years are highlighted to provide background knowledge of the context in which tourism development in the study location has taken place. Thereupon, the focus changes towards the study's key theme of tourism, poverty and inequality by analysing the value of tourism-related income through patterns of consumption, presented for different socio-economic groups (Objective 2) and examining valuable opportunities resulting from for different socio-economic groups (Objective 3). Attention is then drawn to power relations by identifying different actors, investigating perceptions on actions and interactions within and between actors at different levels among different socio-economic groups to examine how the influence poverty and inequality (Objective 4). The chapter closes by providing a conclusion.

7.2. Tourism development

7.2.1. The tourism development story

Since the 1990s, tourism development in Brazil's Northeast was encouraged as part of PRODETUR-NE, an extensive tourism-related investment program. Since then, tourism has become an important source of income for coastal regions in the Northeast, particularly in the municipality of Mata de São João, where this study was located (see: Section 4.3.2. Importance of tourism). To learn about this development story from 'inside', different stages of development and tourism development as described by participants are portrayed in the following section.

From "Quase nada! - Next to nothing!" to small-scale tourism development

Many participants expressed that prior to tourism development there was no development at all in Imbassaí, which made life difficult (e.g. Cody, 1_I_14; Dana, 3_I_10; Lisa, 4_I_30; Caroline, 9_I_13). Lisa (4_I_30), for example, who came to Imbassaí from the interior of Bahia, explained that *"There was nothing. There was nothing. I did regret that I came here, because there was nothing".* Other participants talked about a similar experience such as Colin (8_I_20) who stated that *"when I arrived here in Imbassaí: nothing, nothing. Other places as well: nothing."* and Winnie (34_I_26) explained *"we didn't have lights. It was completely different. We didn't have asphalt. We didn't have many cars."* Patty (9_I_13) commented *"it was all much more rustic. We did not have these streets, these sidewalks like today… But it was nice too, it was quieter, there was not this mixture of so many people like today".* These perspectives mirror the wider political economy context in Brazil in the 1980s, where a military regime left behind a more unequal society with access to basic services and facilities lacking (Rocha, 1997; Rother, 2012).

With the establishment of EMBRATUR as a federal government institution and the National Tourism Policy in the early 1990s, tourism gained prominence and subsequently used as a tool for regional development. At the same time, small-scale tourism development was initiated in Imbassaí - mainly by white foreigners who set up tourism businesses. Richard (33_I_25), a European who came to Imbassaí in 1991, bought a house and land at the coast from a Brazilian owner from Salvador and opened his pousada in 1993. He explained that

> *"How did my place look like? It looked VERY simple. There was a pigsty down there. And this house was the only one - apart from my neighbour and a very small house over there. And the centre of Imbassaí? There were very few houses. And all this red sand-earth, clay earth. There were only five pousadas at that time; mine was the sixth".*

Cody (1_I_14), another European expatriate, explained that at that time

> *"Imbassaí had more pousadas than Praia do Forte, because it was a hippie sanctuary here. They came here with backpacks. To camp and so on. And little pousadas, bed and breakfast and so on ... They wanted to have cheap holidays. As a result, many came here to Imbassaí".*

Overwhelmingly, foreigners described that they loved the isolation and tranquillity at that time. They had the benefit of bringing money with them, of which they could not only live, but also to start a new business (e.g. Cody, 1_I_14; Tony, 17_I_1; Richard, 33_I_25). Tony (17_I_1) confirmed that *"Gringos [=foreigners] used to live in a paradise"* and Cody (1_I_14) even stated that *"I was the king here".*

From small-scale to large-scale tourism

From 2000 onwards, PRODETUR-NE investment started to kick off in the tourist region of Costa dos Coqueiros, where Imbassaí is located, and tourism was developed on a large-scale basis. One participant (Alex, 37_I_32) pointed out that *"when they started to build hotels close by, tourism here started to grow… it started to evolve. And they built more and more hotels here… around 10 kilometres from here. Close to Imbassaí, they built hotels".*

Another participant (Ryan, 23_I_5) explained that

> *"we have many resorts here in the area. We have four big resorts in the area. Not only in Imbassaí. Imbassaí has one[47]. So many people who live here work in these resorts. And so, tourism the main economic sector in the area".*

Many locals (e.g. Bridget, 12_I_29; Otto, 21_I_27; Alex, 37_I_32) expressed that large-scale tourism development in the region, in general, had a significant impact on improving people's livelihood by providing numerous job opportunities - not only in the accommodation and food and drinks sectors, but also in related sectors such as shopping and entertainment/activities (see: Photo 7-I), and delivering wider development benefits (see: Section 7.2.2. Value of tourism development). Thus, national tourism policy, and particularly PRODETUR-NE with its main objective to reduce poverty through employment in tourism, showed their effect.

Photo 7-I: Stands at the hotel-complex beach
Source: Otto (21_I_27)

[47] The large-scale all-inclusive hotel complex (part of a Spanish hotel chain) opened in 2010. It is located in an area that belongs to Imbassaí, that is, however, in distance to the centre.

The majority of foreigners (e.g. Cody, 1_I_14; Amy, 13_I_19; Tony, 17_I_1) emphasised that they did not value this large-scale development since it destroyed the tranquil and laid-back atmosphere of Imbassaí. Some participants, however, acknowledged that having a large well-known hotel chain in Imbassaí brings value, in that Imbassaí as a tourist destination receives publicity. Amy (13_I_19), for example, stated that

> *"I think a lot of people think that the big hotels destroy the nature here. I don't like the large hotel complex in Imbassaí. I don't LIKE it. But, I was in Europe and I opened a book and I saw "hotel complex Imbassaí". I was so proud. Imbassaí is on the map because of this hotel complex".*

Overall, participants expressed that tourism, small-and large-scale, changed the way of people's lives. Patty (9_I_13) stated that *"I don't know how it would be without tourism. Maybe… people would live like before… from coconut harvest, because this was what they had. And from fishing".* Similarly Freddy (11_I_17) commented "*without tourism here in Imbassaí, life would be based on agriculture. I can see this… well, on coconut and fishing. These would be the two sources of income".*

Tourism today

Today, small-and large scale tourism development co-exist attracting different types of travellers. Tourism is the main industry in the region, so that communities such as Imbassaí highly depend on tourism to sustain their livelihoods. Hosting two mega-events, the World Cup 2014 and the Olympics 2016, intended to increase awareness about Brazil as a tourist destination; however, both had only a little impact, if any, for the Northeast, and definitely no sustainable impact from the perspective of participants. While one owner (Matthew, 30_I_8) stated *"They made a difference during that time. Now, they make no difference anymore"*, another one (Tony, 17_I_1) commented

> *"No, there was no impact at all. For example, during the World Cup, Imbassaí was empty. The Croatian national team was in Praia do Forte. It was empty. I was there on a day, when no football match took place, at eight o'clock in the evening. Everything was closed in Praia do Forte. It did not have an impact. And the Olympics? Definitely not. The Olympic Games were a local event in Rio de Janeiro"*

and continued explaining that

> *"So, 80,000 people fit in one football stadium. Let it be 100,000. At carnival a million people come. This has an impact for the coast, but 80,000 don't. It was actually a disaster. On a match day, you could still*

> *rent pousadas for 140 Reais [=GBP35] in Salvador - which were previously offered online for 800 Reais [=GBP200]".*

Many participants (e.g. Dana, 3_I_10; Tony, 17_I_1; Richard, 23_I_5; Matthew, 30_I_8; Winnie, 34_I_26) further expressed their concern about the industry's vulnerability due to Brazil's political and economic crisis (see: section 4.2. Brazil - the wider political economy context) - thus, showing that tourism development is dependent on the wider political economy of Brazil. Winnie (34_I_36) pointed out *"We received a lot of people and now it changes day by day. The crisis - it happens! Not only in Brazil!"*. Tony (17_I_1), a European expatriate, explained that *"Well, domestic tourism has collapsed because of the economic crisis. We feel that. You can see an enormous impact on international tourism - Salvador has lost the international flights, has lost the cruise ships".* Ryan (23_I_5) gave details about the situation in Imbassaí by describing that

> *"we have pousadas here that are closing and they are looking for some other way to get money, because the crisis is affecting everybody. Our occupancy is down from 44% to 27%. It is a lot. […] We had to reduce the number of employees".*

Mattew (30_I_8) added *"this year [=2016/2017] has been one of the worst years we ever had since we opened the pousada".* Tony (17_I_1) took a critical view of tourism in Imbassaí overall and argued that

> *"As a matter of fact, there is no tourism here. But everyone has in mind that we have tourism. Diagnosis: schizophrenia, corrective schizophrenia. The one, with the Jangada, THINKS, we have tourism. The one, with the pousada, THINKS, he has tourism. But: how was tourism here before [=before the crisis]? Between Christmas and Carnival, there may have been something like tourism".*

In fact, there has always been high dependency on seasonal trade as Oscar (15_I_3) pointed out *"it is maybe two and half month. Very short".* Finn (6_I_28), who works in a barraca, explained

> *"we do not only have a high season, but also a low season. And we need more tourism here, because all people here, who live from tourism, come to a season of suffering - low season. There are months here, when the occupancy rate of accommodation providers is well below the level…. well below the level".*

Photo 7-II: "Pure reality 1"
Source: Finn (6_I_28)

Photo 7-III: "Pure reality 2"
Source: Finn (6_I_28)

He (6_I_28) took photos to express the situation in low season - or as he said *"to show the pure reality of what happens here at the beach of Imbassaí"* (see: Photo 7-II and Photo 7-III).

7.2.2. Value of tourism development

The value of tourism for people became evident, when participants compared their lives today with their lives prior to tourism development - as it was already indicated in the previous section. For example, participants explained that without tourism,

> …*"it would be dreary here, I would say. It would probably be the same as it was 30 years ago"* (Matthew, 30_I_8).

> …*"it would be as it was 25 years ago. 25 years ago, Imbassaí was a deserted beach. A deserted beach… nobody remembered Imbassaí, because 25 years ago, everybody just spoke about Praia do Forte, and Imbassaí did not really exist"* (Alex, 37_I_32).

Tourism development was not only associated by participants with change, but with 'good development' as Anna (16_I_11), for example, stated that *"I think that tourism brought development for the area, for the whole region. Yes, tourism brought good development. For sure!".* Similarly, other participants pointed out that *"tourism brought the better"* (Colin, 8_I_20) and that *"everything is much better. People could improve their lives very much. Everybody is better"* (Lisa, 4_I_30).

The change that occurred through tourism development was characterised as survival and sustaining livelihoods, particularly for natives, and access to wider goods and services (e.g. Bridget, 12_I_29; Leo, 18_I_22; Emil, 32_I_9). Leo (18_I_22) explained that *"Everything is because of tourism! If tourism wouldn't be in Imbassaí, but only natives, there wouldn't be any provision of supplies".* Otto (21_I_27) confirmed Leo's perception by arguing that without tourism *"everything would be lacking".* Similarly, Freddy (11_I_17) stated that *"because of tourism development, all other things came"* and Bridget (12_I_29) clarified *"tourism brought good things to us".* Franklin (26_I_12) believed that

> *"here, everything that happened... and probably everything good that can happen.... has an anchor in tourism. This region only reached this level of development with people having access to better services such as sanitation facilities, schools with good facilities, health services (which are a little bit better, they were much worse before) and to*

> *supply of goods… you can see many, many shops, supermarkets, pharmacies. All these things are only here because of tourism".*

Overall, Freddy (11_I_17) concluded that tourism brought *"a greater quality of life".* The great importance of tourism was emphasised by various participants in stating that tourism…

> *…"is essential, for us here"* (Otto, 21_I_27).

> *…"is the most important way of survival. The most important economic sector here is tourism"* (Ryan, 23_I_5).

> *…"THE main source of income for Imbassaí. Whether you are speaking about hotels, pousadas, or apartments to rent, that's all tourism. People come here during the summer because they want to go to the beach. So, tourism is the main economic activity for the Northeast, specifically for Bahia"* (Matthew, 30_I_8).

However, while many participants emphasised the importance of tourism for bringing good development and a greater quality of life through the provision of employment and income, participants also showed concern about the dependency on tourism. The majority of people sustain their livelihood through being involved in tourism as Franklin (26_I_12) put it *"so, today the great majority of our population lives from tourism in one way or another".*

Otto (21_I_27) explained that

> *"For people who live from tourism, it is very important. For example, a waiter, he leaves his house in the morning and comes here to work… if nobody comes to the beach and stays in a barraca, he won't earn any money. […] We depend on the money; not only we, but everybody does. With tourism, many people came, things started moving… on the one hand, there is dependency on tourism, but, on the other, tourism also provides a certain level of stability and growth".*

Matt (2_I_24) who is a beach hawker emphasised

> *"This is my source of income. We [=his community] depend on tourism. We are directly dependent on the movement of tourists here in Imbassaí. We are craftsmen and 100% of our sales go to people, who visit*

> *Imbassaí - not to people who live here. Tourism is indispensable for our survival".*

Rachel (5_1_15) described drastically what it means to be dependent on tourism *"Without tourism, I couldn't do anything. I would have hunger. Really, I would have hunger. I live from tourism. Everybody here lives from tourism. All pousadeiros [=pousada owners], restaurants… and so on".* The dependency on tourism becomes strongly evident in low season, when tourist numbers decrease significantly in comparison to high season - as Rachel (5_1_15) pointed out that:

> *"in this time of the year is low season. When there are no tourists here, I do not sell anything. And then? What can I do? There are days when I just sell one coconut. I buy bread and go home. It is serious. There is a time when I don't sell anything - especially when it is raining, there is nobody here. I maybe sell one coconut, buy bread and go home. This is how it is sometimes. I don't have anything in my home to eat. NOTHING. Do you understand? This is how it is".*

Alongside dependency, participants communicated that new challenges and problems arose as a result of tourism development. Emil (32_I_9) stated that *"tourism always brings bad things as well, because everybody wants to live in a good place. So, people take problems here. Everybody has problems, so these problems come here".* With tourism attracting more people to Imbassaí, challenges in accommodating all people have evolved as one participant (Anna, 16_I_11) clarified that

> *"I see the negatives more… we do not have sufficient infrastructure. And it starts that we lack water. And we lack power and we experience absurd power outages. We experience lack of water supply. And we also have problems, because we do not have a sewage system…. if you don't have a sewage system, what happens?"*

Comparing development and quality of life with neighbouring communities, participants acknowledged that development is unequal. Henry (24_I_23) explained that in the municipality, progress and development just took place at the coast, so that *"the coast here is much more equal"*, whilst *"in the interior, there, poverty is much stronger".* Freddy (11_I_1) clarified *"You do not even need to go very far to find isolated places that only have a minimum infrastructure".*

Overall, participants expressed that tourism is a *"double-edged sword"* (Freddy, 11_I_1) since it brought, on the one hand, 'good development', 'the better' and a certain 'quality of life' to the community; on the other hand, participants also described 'dependency' and 'imbalance'. These issues are further unpicked in the next Section 7.3. Tourism, poverty and inequality.

7.3. Tourism, poverty and inequality

7.3.1. Patterns of consumption - the value of tourism-related income

This section analyses the value of tourism-related income through patterns of consumptions for different socio-economic groups (Objective 2).

Perspectives of poor-income participants

Participants falling in the poor-income group strongly emphasised how tourism-related income improved their material conditions/needs in terms of water, food, housing and health-care (Matt, 2_I_24; Lisa, 4_I_30; Rachel, 5_I_15; Keily, 36_I_15). Lisa (4_I_30) stated that *"It is much better now, because people did not have anything to eat, to drink. Now it is better because people can earn money to sustain their lives - buy water, food and small things like this"*. Rachel (5_I_15) emphasised that due to income from tourism her family could afford to build a house:

> *"We have a house. We managed to build it. But I don't have anything else. I do not have a sofa. I don’t have a table. I don't have chairs. One chair, my father made. I don’t have anything. If you come to my house, I can't offer you anything. I don’t have anything. When you come to my house, I don’t have anything. My room is empty. It is true. I don’t have anything. No."*

The importance of having a home was also emphasised by Matt (2_I_24) in arguing that apart from his home, he does not need much more (see: Photo 7 IV: Home). Keily (5_I_15) pointed out that *"if I had more money, I would buy a house"* - thus, emphasising the importance of having shelter.

Photo 7-IV: Home
Source: Matt (2_I_24)

In Brazil, health-care is funded by the Brazilian Government. Public health-care services provided through the National Healthcare System (Sistema Único de Saúde, SUS) are universal and free for everyone. Small health-care centres (Posto da Saúde) offer primary health-care services, particularly for communities in rural areas, who do not have access to public hospitals. Despite accessibility to public health-care services, their quality differs greatly - particularly, in contrast to private health-care services. Participants explained that they use their income to afford better health-care services as, for example, Bridget (12_I_29) highlighted that

> *"I can have the surgery because of my work… that gave me some money, so that I can pay the whole assessment. For the whole private assessment, I did not have to stay in a SUS queue; I did not have to go through the anger that when picking up the record, a doctor wouldn't be available, because he wouldn't be in that day. And often there is nobody who tries to explain things to you and you need to come back another time. So, today, I had the whole assessment, paid for it. I will pay for the surgery. Everything is private. And in SUS, I cannot stay with someone, because you do not know where you end up. But yesterday, when I had the assessment, my daughter went with me, and the doctor explained to both of us".*

Similarly, Lisa (4_I_30) stated that

> *"On Monday I am going to Camacari by bus for a health check [breast cancer]. I need to pay for it, because it is in a private hospital. With public services, it takes too long. You will be dead by the time you have the results, if something is wrong".*

Poor-income participants also used money to improve their business and/or make work-life easier (e.g. Matt, 2_I_24; Lisa, 4_I_30; Bridget, 12_I_29). Bridget (12_I_29) built her small barraca to sell home-made sweets and drinks with the help of her children. Previously, she used to have a small stand under an umbrella; however, when it was windy, she got all wet and frequently got ill (Bridget, 12_I_29). Therefore, building the barraca helped her to work in a more comfortable environment, which she emphasised by taking photos (see: Photo 7-V & Photo 7-VI). Similarly, Matt (2_I_24) took a photo of his bike (see: Photo 7-VII) which he uses every day to ride from his home to the beach to sell craft to tourists. He (Matt, 2_I_24) clarified that without the bike, he would take him much longer to get to work - thus, it makes his working day easier.

Photo 7-V: Barraca 1
Source: Bridget (12_I_29)

Photo 7-VI: Barraca 2
Source: Bridget (12_I_29)

Photo 7-VII: Bike
Source: Matt (2_I_24)

Lisa (4_I_30) managed to buy a TV for her small bar. She (Lisa, 4_I_30) explained that

> *"I could also buy a TV which I have in the café. I bought it for the World Cup, so people came in to watch games. It helped me for my business. I couldn't buy it on my own, but Cody [=her friend, research participant] helped me."*

However, despite tourism providing income, it is just about enough to survive (Matt, 2_I_24). A main challenge for him is the irregularity of income by pointing out that *"sometimes I sell my craft and make a minimum wage, sometimes I sell nothing. You know? So, the thing we do not have is a basis of income. But we survive"*. Rachel (5_I_15) described a similar situation by arguing that there are days in the low season, when she does not sell anything. Thus, she (Rachel, 5_I_15) needs to save the income, she earns during the summer, *"to be able to eat during six months in winter, because in winter there is no income to buy food"*. In this time, she (Rachel, 5_I_15) said that *"when I just sell one coconut, I buy bread and go home".*

Perspectives of low-income participants

Similar to poor-income participants, housing played a role among participants who receive low income. Finn (6_I_28), for example, considered that

> *"My work in tourism is very good because it is from where I draw my sustenance. And, Thank God, I am living and succeeding in doing my things. Building my house. And much more. So, for me, it is very good"*.

In Leo's (18_I_21) opinion people have the opportunity to extend their material wealth due to tourism employment as he argued that *"Material wealth is what people are looking for. That's not different from the rest of the world. It starts that people here discover these things."* He (18_I_21) further explained that

> *"because of tourism, people have money to buy what TV tells us what we should have. Not only TV, but other people… for example, when people from here visit a city nearby such as Salvador, which is 60 km away, and they see how people live there, they also wish to have material things".*

He (Leo, 18_I_21) provided an example in arguing that *"as a result of tourism, they have the opportunity of having work and jobs. And the natives, they bought cars"*. Furthermore, participants drew attention to having a TV, a smart-phone or a watch (e.g. Colin, 8_I_20; Berti, 20_I_16). Participants frequently commented that status plays a key role in this context (e.g. Freddy, 11_I_17; Leo, 18_I_21; Henry, 24_I_23). Leo (18_I_21), for example, explained that

> *"Status matters. For example, I know people who live where I live. And when they go shopping for bread, they use their car. That's 500 meters. And yet they drive by car. […] Because in the past, before tourism was developed, they had a very, very simple life. And, of course, these days, they want to show what they own".*

Alongside material goods, participants mentioned leisure activities - which did not play a role among poor-income participants. Leisure time involved spending the day at the beach and having barbecue (e.g. Oscar, 15_I_3; Leo, 18_I_22; Adam, 22_I_2), sports such as surfing (e.g. Luke, 19_I_21), music (e.g. Adam, 22_I_2; Berti, 20_I_16), shopping (e.g. Berti, 20_I_16; Adam, 22_I_2; Adriano, 37_I_32) and travelling within Bahia (e.g. Adam, 22_I_2). Frequently, participants highlighted a connection of leisure activities to a second job. Luke (19_I_21), for example, teaches surfing to tourists in his free time and Adam (22_I_2) works as a DJ in a bar to generate further income.

Photo 7-VIII: Leisure time
Source: Adam (22_I_2)

Perspectives of higher-income participants

Interestingly, for the third group of higher-income participants, tourism-related income was not key for survival; instead it is considered that people owning a pousada have already been rich as Amy (13_I_19), also a pousada owner, pointed out

> *"I think what they [=pousada owners] have is their assets, house and land. That is their richness. I am not sure if they have a lot of money in their bank-account. I am not sure… I am not! Their richness is what they own, what they have, because a hotel in Imbassaí, or around here, doesn't bring you millions".*

Cody (1_I_14) observed that *"most of the pousada owners here came with money. They don't need the money from running the pousada. The pousada is more like a hobby for them".*

In this context, higher-income individuals expressed that having a pousada in Imbassaí was a lifestyle choice (Freddy, 11_I_17; Amy, 13_I_19; Ryan, 23_I_5; Richard, 33_I_25). Ryan (23_I_5), for example, a white Brazilian pousda owner, stated that

> *"So, when I was 40 years old, I decided to change my life and then I built this place. And since then, for 20 years, I have my business here. And the impact for me has been very good, because I live in this paradise. […] My life has changed very much. It is much more calm. More tranquil. No stress. I like to live like this. Imbassaí is perfect for that."*

Ryan (23_I_5) continued to explain the lifestyle he got from that choice

> *"It is a place where you come to rest and appreciate the nature; the beaches are not overcrowded by too many people. It is almost like a desert. […] I, for instance, wouldn't like to live in a place like Praia do Forte. Besides my business, there is my life also. I just love living here".*

Freddy (11_I_17) confirmed that

> *"I like it very much here. Here is my project of life… I live in front of the beach, have land to plant and I can raise my daughters in a healthy environment. My workplace is wonderful, where I get to see and meet tourists, where I have the opportunity to work".*

Photo 7-IX: Lifestyle - in line with nature
Source: Freddy (11_I_17)

He (Freddy, 11_I_17) explained that his family chose to live in Imbassaí *"to have more quality of life. In Salvador, we did not have space to plant. The beach was far away, we had no leisure, we did not have good air".* He (Freddy, 11_I_17) further emphasised that

> *"here is my base. My base will always be here. This place is the place I did choose to live, to create my roots. […] The place of my roots is Imbassaí. Imbassaí was where my daughters were born, where I built my own house, my first house. Everything I value is here"*

and *"today, I work in a good rhythm, I do have work every day. I do have a work rhythm. It's very good, thank you God. We have good work. And I can stay at the beach every day".*

A greater quality of life in Imbassaí, particularly, through the natural surroundings, was also emphasised by Dana (3_I_10), Patty (9_I_13) and Anna (16_I_11). Dana (3_I_10), for example, stated that *"I took these photo [see: Photo 7-X and Photo 7-XI], these photos of green areas, which I like very much. In a big city, you do not find such green areas."*

Photo 7-X: Green area
Source: Dana (3_I_10)

Photo 7-XI: Green area - 2
Source: Dana (3_I_10)

Many participants (Amy, 13_I_19; Freddy, 11_I_17; Theo, 14_I_4; Richard, 33_I_25; Patty, 9_I_13) showed confidence that because of their financial status they have better opportunities that other people. They expressed that providing good school education for their children is a key priority. For example, Theo (14_I_4), European pousada-owner explained that he can afford

> *"an adequate education for my children. My son, the oldest, he does A-Levels this year and will start studying law next year in Salvador. My daughter, who has to go to school for another two years, wants to study medicine. My second son is only three. He still may play".*

He (Theo, 14_I_4) continued that

> *"people who live here cannot afford a private school. If my employee, for example, earns a minimum wage, sometimes a bit more up to BR$1,100 or BR$1,200, he cannot afford to pay private school for two children…. for every child BR$500 per month, because there won't be anything left. What about food? So, it is impossible, he cannot do it. So, his children go to public schools and the standard of these is not the best".*

7.3.2. Valuable opportunities

7.3.2.1. Individual opportunities and challenges

This section examines opportunities and challenges related to being involved in the tourism value chain for each defined socio-economic group (Objective 3).

Perspectives of poor-income participants

Examining opportunities and challenges for poor-income participants, it appears that challenges resulting from working in tourism were more frequently addressed by participants, whilst it seems that participants place stronger value on tourism-related opportunities. The challenges encompass a dependency on tourism in terms of irregular tourism income as a result of seasonality (see: Section 7.2.2. The value of tourism development) and perceived powerlessness towards more influential actors (see: Section 7.4.2. Power relations), and access to and intensity of work. On the contrary, communication with tourists, cultural exchange and establishing relationships were strongly considered by poor-income participants as opportunities.

In terms of access to work, participants drew attention to two issues: firstly, since tourism development is concentrated on coastal areas, people did migrate to these areas and left their families behind (e.g. Rachel, 5_I_15); secondly, due to a price increase, in the tourist destinations, people were forced to live outside the destination, so that each day, they need approximately 1.5 hours for one-way to go to work (e.g. Matt, 2_I_24; Rachel, 5_I_15; Bridget, 12_I_29). For Bridget (12_I_29), this is challenging, because she is in her 70s - particularly, as she was about to have a surgery, she did not see herself being able to walk the distance. Bridget (12_I_29) explained that *"I like working in tourism very much. I like it more than anything else. I already worked in many pousadas. And I worked in a hotel. And I am tired. I don't want anymore."* She (Bridget, 12_I_29) continued that working in tourism is very intense and after some years of work in different areas she got tired of it. This was also emphasised by Lisa (4_I_30).

On the contrary, the opportunity of communicating with tourists, having cultural exchange and establishing relationships were seen as opportunities. Bridget (12_I_29) expressed that she enjoys working in tourism, because she can get to know different people, have conversations with people and create friendships by arguing that

> *"Even more tourism brings happiness through getting to know other people. I got to know you. For me, this is wonderful. For me, this is superb. It has been many years that I have been working in tourism. I was working in pousadas, I worked in a hotel, I got to know people, I got to know artists… you know? I was learning a lot and I created friendships. Until today many people come and talk to me "Donna Bridget, how are you? What are you doing these days?" So, tourism is happiness and communication with people. It is everything".*

Rachel (5_I_15) also explained many people remember her and ask how she is, when they come back to the destination. She (Rachel, 5_I_15) stated that

> *"There are many people. And I cannot remember everybody. There are people who were here two years ago and when they see me, they come and say "Hello. How are you…?, Hello." Everybody remembers me. And hello here and there".*

Perspectives of low-income participants

Low-income participants communicated some difficulties related to working in tourism, whilst they also referred to key opportunities which encompass communication, cultural exchange and establishing friendships with tourists (similar to poor-income participants). In line with these opportunities, participants highlighted that through engagement with tourists, they could advance their knowledge e.g. learning a few words in another language. In terms of challenges, participants drew attention to working conditions, particularly in the context of employment for large-scale hotel and resorts, and lack of wider personal development opportunities. Low-income participants also reported disrespectful and racist behaviour of tourists, particularly by domestic tourists as a challenge (see: Section 7.4.2. Power relations).

Communication, cultural exchange and establishing friendships with tourists were frequently described as key opportunities by low-income participants (Tilly, 7_I_6; Colin, 8_I_20; Leo, 18_I_22; Luke, 19_I_21; Otto, 21_I_27; Adam, 22_I_2; Bruce, 35_I_29). Bruce (35_I_29) stated that *"I like working in tourism. Working with people. For me, this is very important. The cultural exchange. Because you have access to people from various cultures. From various nationalities".* Similarly, Adam (22_I_2) pointed out the importance of having access to different people by describing that

> *"today, I have many "muito legais" [very cool] friends. I have access… access to the world, because of my work in tourism. I know different people. I know people from other countries. I know different cultures. I think tourism brought me much quality and many personal benefits".*

Establishing friendship was emphasised as a key aspect, which was strengthened by Adam (22_I_2) explaining that he made many friends through working in tourism; while he sought to meet them regularly, he acknowledged that it is difficult to combine work and private life when being employed in tourism due the working conditions including long and irregular working hours depending on shifts (early, late or night shift), working at weekends and working during main holidays season. Nonetheless, he (Adam, 22_I_2) concluded that *"For me, tourism is very important. I love tourism."*

Leo (19_I_21) also stated *"I love working in tourism"* and further explained why in stating that

> *"first of all, because of contact with people. […] When I had contact with tourists for the first time, in the past, it has always been a good feeling, because for us as natives having contact with tourists represented "the exotic". Every person likes to get in touch with "the exotic" and afterwards gets more interested to learn more about it… through contact and exchange".*

Similarly, Luke (19_I_21) pointed out that tourism provides opportunities to learn about different places and cultures

> *"...it's funny because we do not know how to speak English or German, but communicate a lot with gesticulation. Very funny. But we have to communicate, to speak, to welcome and to exchange experiences, for example, about places. We are delighted when we learn of cities like Venice. We were delighted to hear about Paris and about other traditions and other things, we love it a lot".*

As indicated by Luke, the opportunity does not only exist in cultural exchange; however, also, in advancing knowledge. Finn (6_I_28) stressed the opportunity of learning a few words in a different language by stating that "*tourism is important for me, because I can learn other languages. It is not very much, but I can have little conversations, I have learned a few words*". In addition, Colin (8_I_20) emphasised that *"Tourism brought knowledge. I learned little in exchange with them [=tourists]. I can understand various European people and their languages. I know how to communicate and I know how to treat people. This is important to learn".*

Adam (22_I_2) explained that working in tourism, particularly in the accommodation sector, involves long and irregular working patterns, which can describe challenges in combining work and private life. Participants not only communicated long and irregular working hours, but also high workload combined with lack of knowledge/ training for the job and pressure to do the job (e.g. Finn, 6_I_28; Dawn, 31_I_18; Alex, 37_I_32). This impacted on the quality of the working environment, and particularly, on the quality of the delivering a good customer service (e.g. Finn, 6_I_28; Dawn, 31_I_18; Alex, 37_I_32). For example, in regard to employment in the large-scale hotel and resort, Alex (37_I_32) explained that

> *"the hotel does not want to know whether a person attended a course or a training or didn't. The hotel does not want to know whether the person speaks English, or Spanish. The hotel does not want to know this. The hotel wants you to come, show up for work, give your name, give your work permit and work. Many people I know, many employees I know here, they do not have any experience. […] When a hotel puts a person to work in the area of tourism, they have to choose an employee who is prepared for the job and not an employee who is unprepared. If you have an employee who is not ready for the job, he will not please the tourist. A hotel with five stars should pay attention to the capacity of employees to receive tourists well".*

Dawn (31_I_18) further reported that *"you are treated like an outlaw. Every day, two to three times, people are scanned to check if they stole something from the hotel. That's really ... I felt very, very bad".* She (Dawn, 31_I_18) commented that because of negative experiences, she will, if it is not necessary, not work in such working environment anymore; at the same time, however, she (Dawn, 31_I_18) acknowledged that local people *"do not have another option. This is what they can get. This is the job, they can get. That's it. There is no alternative."*

Leo (18_I_22) and Finn (6_I_28) described that they decided not to work any longer for a large-scale hotel and resort. Finn (6_I_28) who was an apprentice in a large-scale hotel and resort described that he left his job to work for a barraca, where he equally has long working hours; however, he can work much more freely. He (Finn, 6_I_28) stated that

> *"For me, working here is much better than working in one of the hotels. You can get a salary, but you do not have any freedom. You do not have this. So, working in the barraca is very good. Here it is very good".*

Leo (18_I_22) explained that

> *"I chose to work in a pousada. I prefer to work in a familiarly atmosphere, because I feel more connected to people, colleagues and tourists. In my opinion, in a pousada you can have a closer connection than in a very large resort. And the contact between people is different, more real".*

Alongside, challenges related to working conditions, wider personal development opportunities for low-income individuals were found to be non-existent (Leo, 18_I_22; Luke, 19_I_21; Adam, 22_I_2; Dawn, 31_I_18). While Luke (19_I_21) valued that an institute, founded by the large-scale hotel and resorts in the region, offers various courses in tourism (see: Section 7.3.2.2. Societal benefits and costs), he explained that *"courses are for barmen, courses for waiters, cleaners and cooks. Only very few courses are for the reception or others. So, the opportunities are very little"*. He (19_I_21) added that he would like to learn a different language, because in his opinion this would increase opportunities. Similarly, Adam (22_I_2) pointed out that the hotel does not offer any courses, so *"if you want to do a course to learn English, you need to pay the English-course. The hotel does neither provide funding nor helps you to cover the cost. It's a pity".*

Perspectives of higher-income participants

Themes such as strong dependency on tourism, a feeling of inferiority (articulated by poor-income participants) and unfavourable working conditions, lack of personal development opportunities and disrespectful and racist behaviour of tourists (communicated by low-income participants), as well as, on the other hand, communication with tourists, cultural exchange and establishing relationships and friendships (strongly emphasised by both groups) were not central in interviews with higher-income participants. In contrast, opportunities and challenges expressed by this group were strongly related to participants' lifestyle choice of living in Imbassaí On the one hand, the lifestyle choice enabled them to have a relaxed lifestyle in a natural environment (see: Section 7.3.1. Patterns of consumption); on the other hand, some participants also expressed that this lifestyle (dominantly related to living in Imbassaí, instead of working in Imbassaí) confines them. Due to the role of these participants as business owners or managers, a key challenge they pointed out was their feeling of responsibility for employees.

Dana (3_I_10), for example, drew attention to the 'other side' of living in Imbassaí by arguing that

> *"Everybody says: "you live in a paradise!" Yes, all good. But I gave up a lot. I do not have a cinema, I do not have a theatre and I do not have a shopping centre... things like that ... a medical clinic, things that are needed, a hospital. I do not have these here".*

Amy (13_I_19) pointed out that she and her husband plan to go back to Europe, because *"First of all: it is a small, small town. Imbassaí is a very small town. And we, my husband and I are from bigger cities, from European cities. So, we need culture, we need Europe again".* Accordingly, Amy (13_I_19) confirmed Dana's (3_I_10) view that living in Imbassaí is connected with limited cultural opportunities. Henry (24_I_23) supported Dana's (3_I_10) statement that having access to insufficient health-care services is a compromise to make, when choosing to live in Imbassaí. He (Henry, 24_I_23) explained that a small hospital is urgently needed, because, on the one hand, the population has grown and, on the other, there is no treatment for emergencies (see: Section 7.3.2.2. Societal benefits and costs).

Henry (24_I_23), who used to live in major cities and worked as a government official, further explored how his current life as a pousada owner is different to before:

> *"when you work with the government, or any other type of job, where you are an employee, you have responsibility, but exercising this responsibility is limited. From the moment you have a pousada, your responsibility increases, because you do not only have the responsibility to run your business, but you also have responsibility for the people who work in your business. They are employees and you are an employer, you are the boss. So you have social obligations, you have the obligation to provide a salary. So you already start the month worrying whether the business can pay all the expenses".*

Similarly, Theo (14_I_4) considered his responsibility towards his employees. He (14_I_4) stated that *"people get income from tourism. I do have 11 people employed: 9 in my pousada and 2 on my farm. They live from my business. If I screw up and do not earn money, I cannot pay them anymore".*

7.3.2.2. Societal benefits and costs

Wider societal benefits and costs of tourism development were strongly emphasised by participants from all socio-economic backgrounds (through photos and in interviews). To present participants' perspectives on societal benefits and costs, these are categorised into: infrastructure, nature and environment, living space, access to goods and services, knowledge and culture, safety and security. In case, there are different perspectives of socio-economic groups, these differences are pointed out.

Infrastructure

Many participants explained that, before tourism development took place, there was 'nothing' in Imbassaí, which was particularly related to lack in infrastructure (see: Section 7.2.1. The tourism development story). Leo (18_I_22) emphasised this by stating that

> *"These photos [=Photo 7-XII & Photo 7-XIII] show infrastructure. Why should we talk about infrastructure? We talk about infrastructure, because tourism made it possible for us to have infrastructure in our city, in our village. If tourism was not here, I don't think it [=infrastructure] would have been done".*

Photo 7-XII: Infrastructure - 1
Source: Leo (19_I_22)

Photo 7-XIII: Infrastructure - 2
Source: Leo (19_I_22)

Otto (21_I_27) explained that

> *"Tourism brought many things. With every condominium and hotel having been built, infrastructure has advanced. Many municipalities already have pavements. This is because of tourism. Tourism came, and they had to make the road to the hotel. So, they made a contract, closed the contract, and made these things here, in Barro Branco, in Diogo, in many places, in the whole area. Tourism has improved everything. Tourism improved the infrastructure, improved everything".*

Lisa (4_I_30) agreed with Otto by emphasising that *"infrastructure has become much better. For me, everything is much better".*

By explaining that places close by only have a very limited infrastructure and are isolated, participants pointed out that they consider infrastructure development mainly a result of tourism development (e.g. Freddy, 11_I_17; Amy, 13_I_19). Patty (9_I_13) clarified that the 'Linha Verde', a road that connects Imbassaí to Bahia's capital Salvador, did not exist prior to tourism development. Freddy (11_I_17), a business owner, further explained in what way road infrastructure, particularly the Linha Verde, improved his daily life:

> *"So, tourism provided me with infrastructure and gave me a higher quality of life. I do not have to spend two hours to drive to Salvador for shopping, I do not have to spend money on fuel. So, I do not have to spend time and money. So, I have more time to stay with my family… This is quality of life"*.

Not only access to Salvador was improved, but also at smaller spatial scale. Rachel (5_I_19), for example, who is a micro-entrepreneur, took a photo (see: Photo 7-XIV) of a new road that connects Imbassaí with Barro Branco - a neighbourhood of Imbassaí where many people had to move to due to increasing prices in Imbassaí (see: Living space). The road facilitates easier access to Imbassaí for Rachel, who walks every day from Barro Branco for 1.5 hours one way.

Photo 7-XIV: New road
Source: Rachel (5_I_15)

While locals valued this new road, foreigners took a critical look questioning whether it was necessary. Cody (1_I_14) described the road as the *"new runway of Imbassaí"*. He further elaborated that

> *"they built a highway. Totally useless! Wasted money. And total environmental destruction. They smashed down all old trees and build a massive highway no one needs […] People wanted a road, but a simple one, not a massive highway. It's idiocy"*.

He (Cody, 1_I_14) added that investment into a road that improves access to the municipality, Mata de São João, would have been worthwhile, in particular, since the closest public hospital is in Mata de São João. For Tony (17_I_1), this is only one example that shows the inability of the public administration. He (Tony, 17_I_1) stated that *"public planning is just symbolic, because they do not care".*

In terms of tourism, Audrey (29_I_7) pointed out that private businesses seem to be more concerned about developing infrastructure than public institutions since there is no sense of collaboration. She (29_I_7) explained that

> *"I think the Secretary of Work, the Secretary of Transport and other departments in the municipality should be involved in managing tourism. I don't feel this involvement though. For example, transport to Imbassaí is a nightmare. If I didn't know this place, I wouldn't like it very much. Tourists from other countries might never return here, because they do not want to have such hassle again".*

Tourism business owners largely agreed with Audrey (29_I_27), in that the infrastructure is not sufficient to comply with tourism demands (e.g. Theo, 14_I_4; Anna, 16_I_11; Tony, 17_I_1). They also referred to frequent power outages, lack of water supply, particularly, during summer season, and an inadequate sewage system (see: Nature and Environment).

Nature and environment

Although infrastructure development had a positive impact for the population, it also had a harmful impact for the natural environment - as indicated in the previous section. Colin (8_I_20) made clear that *"with tourism, vegetation was destroyed and environmental areas were deforested".*

Franklin (26_I_12) noted that

> *"a big business that does not leave an impact, does not exist. Every business leaves an impact. The environmental impact of big businesses in the region is a fact. A resort with 2,000 apartments built without having an environmental impact - this does not exist. The environmental impact is obvious. Now you have to have options: either to reduce or compensate that kind of impact".*

Otto (21_I_27) emphasised that people should be more concerned about the nature; however, he pointed out that *"unfortunately, it is like this: the people here, our whole* *country, we value money more than we respect the nature. So, I think the nature in Brazil will disappear, not only in Imbassaí".*

Audrey (29_I_27) drew attention to the environmental impact caused by people by arguing that *"we have problems here, problems that come with people, who, for example, throw rubbish on the streets, throw rubbish at the beach, and rubbish into the river"*. This was also pointed out by several other participants (e.g. Dana, 3_I_10; Rachel, 5_I_15; Caroline, 10_I_31; Leo, 18_I_22; Emil, 32_I_9). Dana (3_I_10) particularly highlighted the behaviour of day-tourists from the region

> *"many people go away for the weekend, or a day, the "farofeiros", they arrive, do neither make use of pousadas nor barracas. They leave their things at the beach. Diapers, waste bags, cans, bottles, plastic. Dishes, posters. Everything is left that the beach. There are many things at the beach that shouldn't be there. And many things go into the sea. MUCH rubbish, MUCH rubbish".*

Leo (18_I_22) elaborated that

> *"There are some pousadas that do not organise things with the institutions here, but they do it on their own, which is not good for the nature. [...] Sometimes the dirt water from the toilets and all that is not directly connected to the sewage system. [...] In one case, for example, a pousada did not have access to the sewage system, and when a pipe broke down, the filthy water went straight in the river for a month or more. If these things are not sorted fast, problems occur... which are very, very dangerous for the nature here".*

An inadequate sewage system was frequently mentioned by participants to cause the greatest environmental damage to the destination (e.g. Cody, 1_I_14; Theo, 14_I_4; Tony, 17_I_1; Luke, 19_I_21; Otto, 21_I_27; Matthew, 30_I_8; Richard, 33_I_25). Tony (17_I_1), a foreign pousada owner drew attention to 'a prize' his environmental group announced for the worst environmental performance:

> *"This is a prize, the "Premium Barata [=cockroach]" which was given to a large hotel and resort, because this hotel and resort has been inducing sewage water from the laundry and employee-residences into water sources, which feeds into the river Imbassaí. It is better today, but it happened for six or seven years".*

Photo 7-XV: Prize "Worst environmental performance"
Source: Tony (17_I_1)

He (Tony, 17_I_1) added that not only an inefficient sewage system of tourism businesses (hotels and pousadas) causes environmental damage, but also of 'condominios' (private apartment blocks). The following photo (see: Photo 7-XVI) shows *"the sewage water that was pumped from one of the condominios onto the street, because it was not connected to the sewage system due to cost issues"* (Tony, 17_I_1).

Photo 7-XVI: Sewage water
Source: Tony (17_I_1)

Obviously, an inefficient sewage system caused further damage for people's health since it entered the main river where locals used to drink from and used to take a bath (e.g. Cody, 1_I_14; Tony, 17_I_1, Luke, 19_I_21: Otto, 21_I_27). Some participants (e.g. Cody, 1_I_14; Luke, 19_I_21) took a photo of a sign which confirms that the water is clean (see: Photo 7-XVIII), although everyone, all locals, know that it is not.

Photo 7-XVII: Drain
Source: Luke (19_I_21)

Photo 7-XVIII: Sign "water quality"
Source: Luke (19_I_21)

Referring to a survey with locals, Tony (17_I_1) reported that

> *"Yes, everyone knows this [=sewage water entering the river]. So, there is no native who takes a bath in the river. Meanwhile, they also do not go into the sea anymore. If there is a south stream, all sewage from Camacari [= an industrial area] floats up to here. It is induced subterranean and comes to the coast".*

Participants frequently considered the inefficiency of the public administration in controlling and setting up sufficient measures to protect the environment (e.g. Cody, 1_I_14; Amy, 13_I_19; Tony, 17_I_1; Luke, 19_I_21; Franklin, 26_I_12; Audrey, 29_I_7). Luke (19_I_21), for example, accentuated that

> *"All this is a big risk, because it comes from big companies, big hotels, they do not consider our nature. In fact, not only the hotels, but also the Prefeitura does not consider the environment. They earn much from tourism, but they do not use taxes to preserve the place. So it's big... and it threatens all of us. It's oversight of the public administration".*

Participants further explained that the public administration also fails to control illegal constructions (see: Photo 7-XIX) (e.g. Dana, 3_I_10; Tony, 17_I_1, Leo, 18_I_22; Richard, 33_I_25).

Photo 7-XIX: Illegal construction
Source: Tony (17_I_1)

Tony (17_I_1), for example, stated that

> *"on the one hand, we have legal pousadas, legal hotels, legal businesses, legal restaurants, and, on the other hand, we have illegal ones, but they are not controlled or closed. And then, as a consequence, we have the sewage in the river".*

Similarly, Audrey (29_I_7) highlighted that

> *"The number of people has also been growing; many people have come to live here to work in tourism. People with low income, they occupy space, they shouldn't occupy. So, they build houses and these do not have sanitation facilities, do not have a sewage system, so the sewage goes into the river. So, there is also an environmental impact caused by people who work in tourism, which, I think, is bad. Although we still have a large part preserved, the impact is very big. The impact on the nature, I think, needs to be treated".*

Despite the negative impact though, she (Audrey, 29_I_7) pointed out that preservation takes place. Amy (13_I_19) and Finn (6_I_28) believed that preservation is strongly linked to tourism, in that it brings environmental awareness. Amy (6_I_28) stated that

> *"The beach is nice, everything is clean. Tourism in Imbassaí is an ecological kind of tourism that is due to the nature of foreign tourists. It is a new kind of tourism that is brought by international tourists. So, tourism makes the place cleaner. When we arrived, I remember, there was just a lot of rubbish in front of the pousada, just left there. And now, this is not the case anymore. The idea is: tourists are coming, so we need to have a nice city".*

Finn (6_I_28), in fact, took a photo (see: Photo 7-XX) of foreign tourists who collected rubbish and took it to a bin - which, for him, is *"very good"* behaviour and *"very cool"* because domestic tourists would not do this, whilst instead he, as a waiter, would be responsible to clean.

Photo 7-XX: Tourists collecting rubbish
Source: Finn (6_I_28)

In recent years, condominios have been increasingly built for domestic people to use as a second home. Thus, environmental damage is not only a result of illegal constructions and lack of adequate sewage systems, but also due to the amount of constructions taking place (e.g. Dana, 3_I_10; Freddy, 11_I_17; Ryan, 23_I_5; Winnie, 34_I_26). Freddy (11_I_17) highlighted that *"Many constructions. Many constructions. Many constructions. Of course, they have an impact on the local environment".* Similarly, Ryan (23_I_5) pointed out that *"I like Imbassaí to be kept as it is, but what happens here, is that many people build villages, condominiums, and they destroy the vegetation. I think that's a major problem for Imbassaí".*

Winnie (34_I_26) was also worried about this development by stating that

> *"another bad thing is: many houses, many constructions. Maybe we have to take care for this. And I know that there are many people from other countries, they decide to build here. I don't know if the government is worried about this. I don't know. It is good for my company [=a private school], but I don't feel it's a good idea".*

Otto (21_I_27) emphasised that these constructions are only for tourists and not for locals since apartments are very expensive

> *"Actually, this [directing towards a construction site] will be a condominium. It will be over there. Everybody, who buys an apartment there, is a tourist. All apartments there are for tourists, because a place there costs minimum 400-500m Reais [=GBP1m-1,25m], I think. Locals cannot afford this".*

As such, tourism and the construction of second homes not only resulted in deforestation, but particularly endangered local people's 'living space' since prices increased and people could not afford to live in Imbassaí any longer (as accentuated in the next section).

Living space

Many participants (e.g. Cody, 1_I_14; Rachel, 5_I_15; Finn, 6_I_28; Leo, 18_I_22; Luke, 19_I_21; Berti, 20_I_16; Keily, 36_I_15) pointed out that as a result of tourism development living cost have increased dramatically with the consequence that locals were forced to leave Imbassaí. The high costs, for example for basic goods, were frequently described as *"prices for tourists"* (e.g. Luke, 19_I_21). To portray the high prices, Luke (19_I_21) took a photo of a supermarket *(see: Photo 7-XXI)*.

Photo 7-XXII: Local supermarket
Source: Luke (19_I_21)

In reference to this photo, he (19_I_21) explained that:

> *"I took this photo [see: Photo 7-XXIII] of the market to show that everything here is too expensive. The prices are for tourists, and not for us, for people who live here, because we only have a little bit. I also work in another place and I study a little bit, so that I can get better opportunities. The money I get from my job is only for buying food, so that I do not need to be hungry. The money I get is not enough. Everything is too expensive - bread, gas, everything that is necessary for living. Then, what happens with us? We rent our own houses, so that we can get more money than we would get only with working".*

In addition, Keily (36_I_15) expressed that

> *"the natives left. Why did they leave? They left, because they could not sustain to live in a place, where they were born, where everything is expensive. So, they had to sell their houses in order to survive. This is not good. The natives left and people from outside came and opened businesses. This is not good".*

Luke (19_I_21) visualised this i.e. that people needed to leave their houses by taking a photo of a sign that says *"Aluga se casa - House to rent"* (see: Photo 7-XXII).

Photo 7-XXIV: Houses to rent
Source: Luke (19_I_21)

He (Luke, 19_I_21) explained that

> *"This photo [see: Photo 7 XXII] represents the following: it shows a house that is to rent. It shows how things are here. People have a sign front of the house that says "to rent". It is a form of generating money by renting or selling their house and living in another place. Because Imbassaí does not have much space, so people left Imbassaí to live in Barro Branco. The same happened in Praia do Forte".*

Rachel (5_I_15) confirmed that *"there are not many natives here anymore. The majority of people, who lived here in Imbassaí, live now in Barro Branco"*. According to Dana (3_I_10), living cost in Barro Branco and similar places are much less than in comparison to Imbassaí or Praia do Forte.

Photo 7-XXV: Barro Branco
Source: Luke (19_I_21)

Thus, people have moved to Barro Branco, established a new neighbourhood and have been going to work in Imbassaí. To emphasise this, Luke (19_I_21) who is a native, took a photo of a sign 'Barro Branco' (see: Photo 7-XXIII) and, referring to the photo, he explained that

> *"So, this photo shows a place that is a little bit far from here. With this photo, I intend to show a place that is called "Barro Branco" which is three kilometres from here. And this is a place that compares to other places like Malhadas, which is close to Praia do Forte… and I intend to say the following: it symbolizes the people who get up early every morning, walk here in order to work here in Imbassaí".*

Interestingly, this issue was mainly addressed by low-income and poor-income participants, who were the first to be affected by the increasing living cost. This aligns with Cody's (1_I_14) statement that foreigners took the *"living space, the place of existence"* from locals. He (1_I_14) added that *"there, where the locals lived, there are now tourists or a pousada or a gringo [=foreigner]".*

Access to goods and services

Many participants pointed out that improved access to goods and services is a result of tourism development (e.g. Cody, 1_I_14; Dana, 3_I_10; Leo, 18_I_22; Luke; 19_I_21; Audrey, 29_I_7; Matthew, 30_I_8; Franklin, 26_I_12; Alex, 37_I_32). In terms of access to goods, Leo (18_I_22) intended to emphasise the diversity of products that are provided by shops and supermarkets by taking a photo:

Photo 7-XXVI: Supermarket - diversity of goods
Source: Leo (18_I_22)

> *"This photo [see: Photo 7-XXIV] is also about infrastructure and also how tourism has created better shops for Imbassaí. For example, a market as big as this 'Tem de tudo' with so many varieties wouldn't be here, if only locals were here. If only locals were here, there would only be practical and simple things, useful things that people need daily".*

However, referring back to Luke's (19_I_21) explanation and photo emphasising that *"everything is very expensive"* for locals, the question arises as to whether the diversity of products offered is, in fact, for locals.

To buy products and goods, people need access to money - which has become easier since Imbassaí has a cash machine.

Photo 7-XXVII: Cash machine
Source: Leo (18_I_22)

Taking a photo of cash machine (see: Photo 7-XXV), Leo (18_I_22) provided the following explanation

> *"It's a cash machine. So, why is a cash machine important for me and for other people here? Now that Imbassaí has become famous as a tourist destination, we have been provided with additional services that are very, very important, so that we no longer have to take a long journey to get money. That's why it is very important here. For example, in the*

> *past, retirees, people who are 70 years old, had to go to Praia do Forte or even further to Lauro de Freitas and elsewhere, which, of course, costs money. For people who earn only a little, it makes a difference. So, this is positive for people. I think that it helped very much".*

Due to tourism development, people in Imbassaí do not only have access to a diversity of goods, but also access to *"better services such as sanitation facilities, schools with good facilities, health services which are a little bit better, they were much worse before"* as Franklin (26_I_12), for example, explained. Dana (3_I_10) pointed out that *"the services that are necessary are available for people who live here"*. Luke (19_I_21) stated that

> *"what we got here are things like colleges, like health centres, that take very good care of people. The things we have today are because of tourism and we are very grateful. For example, we have a SAMU [= an ambulance] that saves many lives and currently a nursery is built".*

In line with Luke (19_I_21), several participants emphasised the value of having an ambulance (e.g. Cody, 1_I_14; Dana, 3_I_10; Leo, 18_I_22; Patty, 9_I_13).

Photo 7-XXVIII: SAMU - ambulance
Source: Cody (1_I_14)

Leo (18_I_22) explained that

> *"we did not have any health-care services. If you were sick, you had to call an ambulance from another city. No idea how long that would take! This is all because of tourism! If tourism was not here, but only locals, there wouldn't be any provision of services, because Imbassaí has only a very, very small population. So, the SAMU is very positive, especially, for old local people, who do not have cars. It is very, very important, that we have an ambulance here for First Aid and so on, to transport people, if something is wrong".*

Focussing on health-care treatment in the small centres, Berti (20_I_16), however, stated that *"here they have very little. When you feel sick, they give you medication. But if you need things sorted [=special treatment], you don't get this here. Here, you can only get general treatment. But you do not get treatment for special things".* Matthew (30_I_8) was confident that the

> *"the public services here are not as terrible here as they are in big towns. So, you have some medical assistance that's not THAT as terrible as in places around. If you need some really big intervention, you have to go to Salvador and then you have to suffer like the rest of the Brazilian population. But, if not, if you need some vaccination, small problems and so on, the health centre here gives some support".*

Henry (24_I_23) provided further insight by arguing that

> *"For any emergency, for someone who had an accident, for example, someone who broke an arm, we do not have treatment here. If you need an x-ray, they cannot do it here. They do not have anything here. They need to transport a person to another hospital that is far away from here".*

The 'hospital far away' is in Mata de São João - which is a *"day trip"* away (Cody, 1_I_14). Thus, participants communicated that a small hospital is required (e.g. Cody, 1_I_14; Berti, 20_I_16; Henry, 24_I_23). Henry (24_I_23) stated that *"it is necessary to have a small hospital here, and to have the basic services like x-ray, sonography and further support to serve the population here".*

It was further discussed whether the small health-care centre is a result of tourism development. While the availability of small health-care centres is required by law for a particular size of population, participants agreed that the one in Imbassaí (as a tourist destination) is better than in areas that are not frequented by tourists (e.g. Cody, 1_I_14; Leo, 18_I_21; Franklin, 26_I_12; Matthew, 30_I_8; Dawn, 31_I_18). Dawn (31_I_18) was confident that

> *"The health-care centre works (and the school too) because there is tourism here. Because people come from abroad and the city wants to show foreigners that it is good here and that it works. But if you drive 40 to 50 kilometres further away from here, you will realise very clearly that it is not like this".*

She (Dawn, 31_I_18) continued that

> *"the health-care centre in Praia do Forte works because of tourism. That's for sure! You can see a difference between the health-care centre in Praia do Forte and here [= in Imbassaí]. It's good here. It's not bad for Brazil. It's really not bad, because many people, many tourists come to Imbassaí. But if you drive 40 kilometres, you'll see that it's really just a theatre show; you'll see that nothing really works here. NOTHING!".*

Thus, participants explained that the health-care centre in Imbassaí is only good enough for locals - not for tourists as Leo (18_I_21) explained that *"any tourist, if he has any issue and goes there, is sent to Praia do Forte or elsewhere - even if he has only a little problem".* Similarly, participants from a better socio-economic background, mainly white Brazilians and foreigners, pointed out that they rather pay for health care in private hospitals than use public services due to their low quality (e.g. Amy, 13_I_19; Theo, 14_I_4; Matthew, 30_I_8; Richard, 33_I_25).

Similarly to access to health-care, a public school is required by law if the population has a certain size; however, participants believed that Imbassaí received access faster than non-tourist areas (e.g. Leo, 18_I_21). However, the quality of public schools was immensely questioned by participants (e.g. Cody, 1_I_14; Amy, 13_I_19; Henry, 24_I_23; Leo, 18_I_21; Matthew, 30_I_8; Dawn, 31_I_18). In terms of public schools, Henry (24_I_23) commented that *"good buildings. The buildings are beautiful. The structure is beautiful, but soul is lacking"*. He (24_I_23) explained that

> *"beauty is not the most important thing. It is necessary to give teachers good working conditions, so that they can provide good education. And today this does not happen: income for teachers is not well; the food for children in schools is not as it should be. […] So, I think the Prefeitura should use public money to put actions in place that support the population; instead of spending public money on luxurious buildings in*

> *tourist places. In Brazil, there is a focus on making things look beautiful, but these things are only beautiful and not efficient".*

Matthew (30_I_8) pointed out that in particular public schools (that are responsibility of the state, not local governments) provide a very poor level of education

> *"when they have to go to high school, they have to go the high-school in Praia do Forte [because Imbassaí does not have one], that belongs to the government. For instance, one of my waiters was supposed to spend 3 years in high-school, but he spent six, because there were no teachers".*

Leo (18_I_21) stated that

> *"only natives go to public schools and people, who just cannot pay for a private school at all. Here it is normal that the middleclass takes their children only to private schools, because they offer a better education in contrast to state schools. There are often strikes at state schools, so teachers do not work".*

Matthew (30_I_8) explained that a friend send her daughter to study in a private school close to Salvador "*because she didn't want to have an almost illiterate daughter"* and emphasised that *"This is what happens to most of the young population: either they go out to study, even to public schools in Salvador, or they have to study in these terrible schools here, where people don't even learn Portuguese".*

Several participants described the 'Instituto Imbassaí' as the 'light at the end of the tunnel' since it provides general education (e.g. Portuguese, Math, Sexual Education) and vocational training for the hospitality industry (e.g. Leo, 18_I_22; Luke, 19_I_21; Alex, 37_I_32). The 'Instituto Imbassaí' was founded in 2005 with the aim of providing professional education to local communities, so that they can gain access to employment in hospitality businesses (Franklin, 26_I_12). Franklin (26_I_12) pointed out that

> *"it is very important that local communities manage to improve their lives by working in regional businesses (i.e. hotels and resorts). The idea is not to transform these resorts into "fantasy islands" surrounded by poverty and misery on all sides. The strategic vision is that people are involved in development processes and get jobs, so that they can improve their lives and develop themselves. The 'Institute Imbassaí' was created with the intention of using tourism as a strategy for social inclusion of people who live here in the region."*

Interestingly, the institute is fully funded by hospitality businesses (large-scale hotels and resorts) operating in the region as emphasised by Franklin (26_I_12)

> *"Our projects, they are always sponsored by a company. We have never received one Real from a public authority - neither from the municipal Prefeitura, nor from the Bahian government or the national government in Brasilia. No. Never. We never worked with the government".*

Although this set up of the institute including its funding structure is unusual in being solely driven by the private sector, it seems to be particularly beneficial in the Brazilian context with its deep structures of corruption (see: Section 4.2. Brazil - the wider political economy context). In that regard, Franklin (26_I_12) emphasised the importance of keeping the institute's independency by arguing that by accepting just 'one Real' from the public administration, it would compromise the institute's independency and would provide opportunities for corrupt politicians 'to ask for favours'.

Many participants (e.g. Leo, 18_I_22; Luke, 19_I_21; Franklin, 26_I_12; Alex, 37_I_32) agreed that without the institute, there won't be any form of capacitating the local population, particularly the Youth, in gaining access and work in tourism. A key professional development program the institute was involved in is called 'Jovem Aprendiz' (Young Apprentice). Since the start of the program in 2010, 1,600 young people have received professional training, with the consequence that locals have gained employment as maids, waiters and cooks in large-scale hotel and resorts in the region. Thus, the institute can be considered as an important actor in the local political economy.

Luke (19_I_21) took a photo (see: Photo 7-XXVII) of the institute which he explained represents *"opportunity",* because the institute allows people to get *"empowered and get more courage"*. Thus, he (Luke, 19_I_21) emphasised the importance of the institute for the population. Similarly, Leo (18_I_22) pointed out the value of the institute; however, he also explained that the education is rather superficial, in that it only trains people for basic jobs.

Photo 7-XXIX: Instituto Imbassaí
Source: Leo (18_I_22)

Despite having access to education, particularly tourism-related education, Audrey (29_I_7) commented that

> *"I think the Prefeitura needs to do more for the population, because if you have a population lacking access and resources, you also have tourism lacking access and resources. People, who live here, do not care so much, which can be very detrimental for tourism".*

She (Audrey, 29_I_7) further accentuated that the greatest challenge for development is the

> *"education of local people. Local people do not have much consciousness of the great importance of tourism for them, for this location. They know that they have work and earn money because of tourism. But they do not have consciousness of the wider importance of tourism. So, they do not empower themselves, they do not prepare themselves, to provide a good experience to tourists and further develop Imbassaí as a tourist destination. The same lack of importance the Prefeitura gives to tourism also exists among the population".*

Knowledge and culture

Many participants emphasised that having access to information and gaining knowledge about a variety of topics through tourism was beneficial for the wider public - even if they are not directly involved in tourism e.g. through employment (Amy, 13_I_19; Freddy, 17_I_11; Franklin, 26_I_12).

Freddy (17_I_11) observed that *"a good thing: tourism has brought information to people. People cannot say that they do not know about things. They have much information".* Various ways were mentioned as to how tourism improved access to information. Amy (13_I_19) explained that because of tourism *"we have a very high quality internet in Imbassaí"* and *"internet makes them [=the locals] to have communication with the world"*. Not only 'with the world' but participants from lower socio-economic background have stronger awareness of what is going on in Brazil. Bridget (12_I_29), for example, referred to the program 'Lava Jato', which initially investigated money laundering in Brazil, but expanded into discovering a nationwide scandal of corruption, and she explained how daily news related to the program make her feel. Leo (18_I_21) explained that because people have better access to information to gain knowledge, they have started to *"make their voice heard".* To support his claim, he (Leo, 18_I_21) provided a general and specific example: he explained that, in general, there is more awareness among students, which has become evident in students occupying schools to draw attention to the weak education system, particularly, to the limited amount of teachers. Focussing on compliance of the hospitality sector with the employment standards in tourism as defined in the 'Convenção coletiva de trabalho' for the region, he (Leo, 18_I_21) explained that employees have much better awareness and understanding of their rights and ensure that these are met. In that regard, Bridget (12_I_29) explained that she made use of her rights as an employee in a pousada, when she felt mistreated by her employers.

Many participants emphasised that through tourists visiting Imbassaí, they have access to information and learn about other countries and cultures - which has already been discussed in Section 7.3.2.1. Individual opportunities and challenges. Participants explained that they enjoy communicating with tourists, having cultural exchange and establishing relationships (e.g. Rachel, 5_I_15; Bridget, 12_I_29, Otto, 21_I_27). In this context, participants frequently drew attention to traditions and festivals that are celebrated throughout the year that brings people, locals and foreigners, together (e.g. Matt, 2_I_24; Rachel, 5_I_15; Freddy, 11_I_17; Ryan, 23_I_5). Freddy (11_I_17), for example, emphasised that Festa de São João is *"a festival to unite everyone - all social classes".* Matt (2_I_14) added that the festival is for *"locals and also for tourists to mix and to interact. It's a very traditional party in the Northeast, São João. It stirs many people here including people who are not religious. You can speak with people, integrate yourself in the community and communicate with tourists. São João is much about this: typical food, dance and celebration. So, it is great to really integrate".*

Photo 7-XXX: Festa de São João
Source: Rachel (5_I_15)

Although Rachel (5_I_15) confirmed that these festivals *"provide an opportunity to mix"*, she and Keily (36_I_15) also took a critical view and argued that people have to mix, because *"there is no way to escape".* They believed that foreign business owners and managers do not want to engage with locals, as Keily (36_I_15) stated

> *"They would never say that they have this rejection. They would always say "I do everything and I talk to everyone", but this not the reality. So, what happens? At festivals, they do not have another option. These are public festivals. So, everybody goes. If they do not want to go, they can go to a place more fancy. Do you understand? We, the locals, do not have this option. They have this option. So, go or stay at home".*

Despite this critical view, these festivals seem to support cultural exchange because it provides people, business owners/managers, employees and tourists, with opportunities to meet and talk. Participants communicated that through meeting and talking with each other at festivals awareness, knowledge and mutual understanding increases (e.g. Matt, 2_I_24; Colin, 8_I_20; Freddy, 11_I_17). Furthermore, cultural exchange influences people's mind-set in being more open-minded as Henry (23_I_24) pointed out that *"there has been development of the region. The only economic activity that exists today in Imbassaí is tourism. With tourism having been developed, an openness of mind and ideas has been established".*

Franklin (26_I_12) added that alongside having better access to information through media and exchange with tourists, tourism development brought 'new' people to the destination, *"a critical mass"* as he described:

> *"Without doubt, tourism brought many people from other places, for example, technicians contributed to this place by bringing knowledge. Today, there are also researchers, people who are worried about environmental issues. Today we have construction technicians, many entrepreneurs, businessmen who came from outside and have created something together with the local population. A critical mass - that thinks about how to grow and how to develop this place. I think this is very nice! I think it encouraged a revolution in the region, in that, the new generation thinks differently to the previous generation. Today, because of tourism, young people have greater interest in professional development, to grow and to attend university, to participate in courses and so on. So, I think with tourism, good things came".*

Both new people and exchange with tourists brought knowledge and influenced people's mind-sets, for example, in terms of preservation (see: Nature and environment). However, tourism also brought 'bad knowledge' which had major negative consequences - as shown in the next section (see: Safety and security).

Safety and security

Many participants explained that due to tourism development, violence, drug abuse, prostitution increased with the consequence that they feel less safe and secure (e.g. Bridget, 12_I_29; Amy, 13_I_19, Freddy, 17_I_11; Franklin, 26_I_12; Winnie, 34_I_26). Freddy (11_I_17), for example, stated that

> *"a negative aspect tourism brought was bad knowledge. Tourism brought information that was not very good. Violence came - which did not exist here before. Such type of urban violence did not exist here. The second aspect is the rise of drug trafficking in the region. In fact, drugs are mostly consumed by tourists. Many tourists who come here in the summer period, for example, they foment this market because of all the parties. It's really mad. One part of tourism here is healthy and the other part is not at all".*

This was confirmed by Franklin (26_I_12) who explained that

> *"because of tourism, people come here. This brings also people who do not have good intentions. They increase violence, they increase drug consumption, such things, which are bad for societies. So, I think there is no way to put a barrier and say: you can enter, you cannot enter, you can enter, you cannot enter the region. Our country is a free country and people can come and go wherever they want to. The region attracts unscrupulous and dishonest people who come here to explore the region in a bad way. This happened indeed".*

He (Franklin, 26_I_12) added that

> *"with more tourists coming here, there is an increase in prostitution in our region. This is not yet worrying, but we need to keep our attention to this. Another issue is that many tourists do not treat local people in a respectful way, with the same polite and gentle manner as they [=the tourists] are treated. Tourists behave as if people from the region here do not deserve respectful treatment. So, tourists think they are better than local people - just because they have more money".*

Rachel (5_I_15) commented that

> *"tourism grew and we have much more people here. As a consequence, people need to live much more careful than before because of the*

> *violence. I think the violence is because of tourism. Violence increased because of tourism".*

A feeling of insecurity was communicated by many participants (e.g. Lisa, 4_I_30; Tilly, 7_I_6; Patty, 9_I_13; Freddy, 11_I_17; Anna, 16_I_11; Berti, 20_I_16; Ryan, 23_I_5; Anton, 28_I_33; Matthew, 30_I_8; Emil, 32_I_9). Anna (16_I_11), for example, commented that *"a young boy who works here said that it would be better not to walk around here, because some robberies took palce. So, it was better for two women to go by car, because these things [=robberies} have really happened in Imbassaí. These people want to steal mobile phones and sell them to make money for buying drugs".* Ryan (23_I_5) stated that

> *"there is a problem with security here in Imbassaí. We don't have many policemen here. Sometimes, when you need policemen, we cannot find them or they don't want to leave the office. Some robberies and assaults happen here in Imbassaí. This is something that is bad, very bad. They [=robberies and assaults] are not done by people who live here, but by workers from outside who come here to work in the condomiums".*

Similarly, other participants believed that new people (not locals) are responsible for the violence as Lisa (4_I_30) highlighted that

> *"when you have development, it brings bad people - who assault people, who steal things from people. When there is work in one place, people come to find work, but there is not enough work for everyone. Then people, who do not find a job, steal, because they need to survive".*

Whilst Lisa (4_I_30), Anna (16_I_11) and Ryan (23_I_5) referred to *"small robberies and assaults"*, other participants drew attention to further issues (e.g. Tilly, 7_I_6; Amy, 13_I_19; Theo, 14_I_4; Oscar, 15_I_13). Tilly (7_I_6) noted that

> *"recently, assaults have been increasing, particularly, at the other side of the road, where the bus stop is. The violence here has become a big issue. Only yesterday a guy from here was killed at the other side of the road. I think because of drugs. He got involved in drug dealing, couldn't pay, so they killed him. This is common. When he started to get involved, he signed up for the devil".*

Tilly (7_I_6) and other participants (e.g. Theo, 14_I_4; Oscar, 15_I_13; Berti, 20_I_16) indicated that violence is worse in in the neighbourhoods where locals live i.e. in distance to the tourist centre. Berti (20_I_16) stated that

> *"Security needs improving in many locations. The tourist points are good, but in parts in the region, where tourists don't go, security is much less. Here in Imbassaí, here are many tourists - that's why there is security here. But in the other place, nobody takes care".*

While Berti (20_I_16) believed that security was relatively good in Imbassaí, Anna (16_I_11) perceived security to be much better in Praia do Forte since it is a major tourist destination. She (Anna, 16_I_11) stated that

> *"In the whole country, there are problems with security (more than here). And, of course, they give priority to Praia do Forte. So, Imbassaí is left without police. The Association tries to put measures in place, but I don't know how these will solve the problems. Once we could walk at the beach, it was calm. Today, you can walk, but you need to stay alerted all the time, especially when you walk alone. It is not how it used to be. So, tourism brought this disadvantage".*

Comparing the situation in Imbassaí with the one in Salvador, Alex (37_I_32) concluded that

> *"It is not as in Salvador. Salvador is a large capital. There are many people there. There, they have much violence. Do you understand? We, people cannot walk with our children on the street, because there are many assaults. Here, in Imbassaí, in comparison, it is calm."*

Overall, participants doubted that change in terms of security issues in Imbassaí would happen (e.g. Amy, 13_I_19; Anna, 16_I_11; Luke, 19_I_21). Amy (13_I_19) believed that Brazil's political system lacks adequate structure and mind-set to govern the country 'righteously' - instead the system is deeply corrupted at all political levels, so that there is no political will to change anything about the situation. Luke (19_I_21) also drew attention to the inability of the administration by emphasising that

> *"tourism has been growing, exploding, and infiltrating everything. But at the same time there has been a mismanagement of tourism that will cause chaos in the future. I think there is no long-term thinking and planning by the public administration. There is no security. There is much violence here".*

7.4. Tourism and power

This section identifies different (group of) actors, who influence tourism development, at different spatial scales and investigates power relations among them (Objective 4).

7.4.1. Actors in tourism

At first, the groups of local residents are defined through the perceptions of participants and in light of the determined socio-economic groups (see: Chapter 6). This is followed by identifying key groups of actors[48] influencing tourism at local scale, whilst linkages to the socio-economic groups drawn. Thereupon, groups of actors at different spatial scale, who were described by participants as outsiders, are presented.

The residents: locals and foreigners

In Chapter 6. Results - Part 1 three socio-economic groups were defined; these socio-economic groups are commonly clustered into two main groups of non-white locals (Group A and B) and white foreigners (Group C). Amy (13_I_19), for example, explained that *"So, I think there are two groups. There are the locals. And the foreigners, the pousada owners. Most of them are foreigners. Even someone from São Paulo is a foreigner for me, because he is not from here"*. Accordingly, people from a non-white background were referred to as the locals including people from Imbassaí and those who migrated to Imbassaí from other parts of the Northeast, and white people are considered as foreigners both Europeans and Brazilians from Southern regions of Brazil.[49]

Participants further emphasised the difference between locals and foreigners. A Brazilian participant (Dawn, 31_I_18), for example, stated that *"Many foreigners live in Imbassaí, and people, who are from Imbassaí. Well, they are very poor. You can notice a great difference. It happens in Imbassaí. Between foreigners and natives. They are totally different".* Another participant (Theo, 14_I_4) commented *"Yeah, sure, they [=non-white locals] perceive the difference. It's partially a creepy jealousy. Envy. Envy indeed".*

[48] Some individual actors and their actions were identified (e.g. association presidents, politicians) were identified; however, cannot be discussed due to confidentiality issues, in that it will compromise their anonymity.

[49] This distinction in two groups, between the white and non-white, resembles with Skidmore's (1992) terminology.

Local groups of actors

In Imbassaí, there are three major associations; two of these have a tourism development/business focus: the 'Commercial Association' and the 'Association of Barraceiros' (beach bar owners) and the other one is the 'Association of Residents' which represents the interest of people living in Imbassaí. Alongside these three associations, there is a locally-organised security council responsible for dealing with security issues together with the police, a local environmental group that seeks to uncover and raise awareness about environmental drawbacks and an online community group that consists of residents and shares information and discusses current local issues.

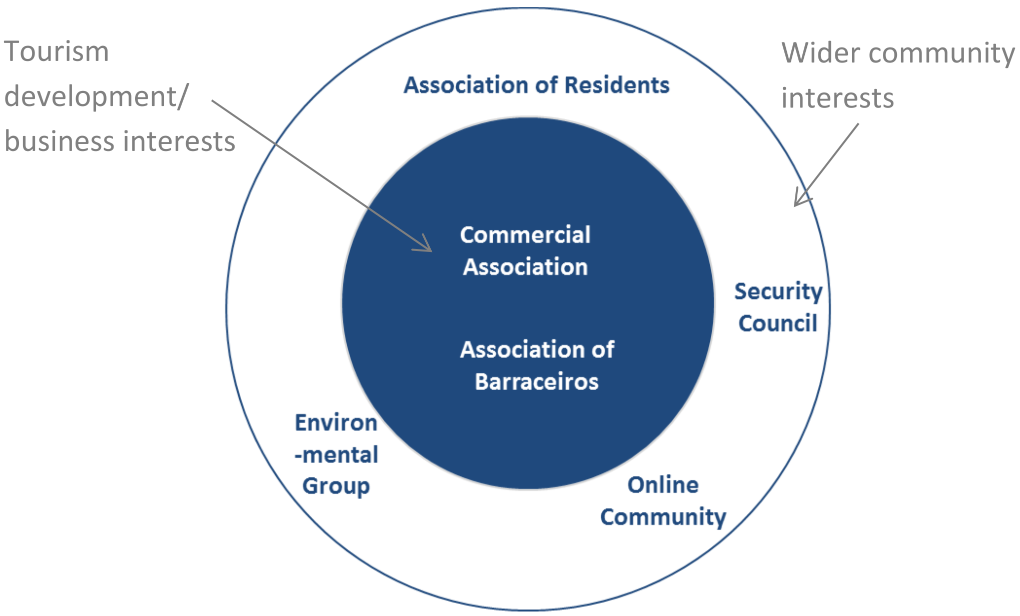

Figure 7-1: Local groups of actors
Source: Author

The Commercial Association was founded almost 20 years ago to have *"an interface with the government, ok, of the locality, what we call 'the Prefeitura'."* (Matthew, 30_I_8). The main aims are to develop tourism focussing on increasing demand through marketing and communication and to preserve Imbassaí (e.g. Matthew, 30_I_8; Patty, 9_I_13). The Commercial Association mainly consists of pousada owners (white Brazilians) and restaurant owners (Brazilian background) (Matthew, 30_I_8).

The Association of Barraceiros is an association of people who have bars at the beach, who are mainly natives, as one participant (Richard, 33_I_25) explained

> *"The natives? They ive from their barracas. There are not many natives. There were, I think, only 19 families originally. They all live in some way*

> *of tourism, by selling something at the beach or by working in pousadas".*

Considering the effectiveness of the three associations, participants perceived that only the Commercial Association seems to have influence in tourism development as Finn (6_I_28) pointed out that *"The only association that functions here in Imbassaí is the one of the businessmen. This is the only one! The one of the residents does not work".* The Association of Barraceiros *"does not have a strong voice"* (Leo, 18_I_22) and the Association of Residents was found to be *"not very active"* (Lisa, 4_I_30). These overall perceptions are further unpicked in Section 7.4.2. Power relations.

We versus They

Despite the existence of different groups of actors linking to different socio-economic groups, a sense of *"we in Imbassaí"* was perceptible, whilst reference was made to *"they outside of Imbassaí".* One participant (Ryan, 23_I_5), for example, expressed the *"we"* by describing the following:

> *"Actually, Praia do Forte is very important, you know, as a tourism place in Brazil. It is known all over Brazil. It is important and because of that, I think, all people invest there, for example, in organising events. It is important to organise events that bring people to the place. But here in Imbassaí, we don't have that".*

The sense of "*we"* was based on the shared understanding of being less important in terms of tourism development in comparison to Praia do Forte as another participant (Richard, 33_I_25) pointed out that *"tourism here could be much better developed, if they would distribute investment in a better way. More equal. Everything goes to Praia do Forte".* He (Richard, 33_I_25) continued by arguing that

> *"I tend to feel that they are not interested in developing tourism here, because the focus of the Prefeitura is Praia do Forte. I have always said that IMBSASSAI is kept small by them. Not only from the Prefeitura, but also from the people who are in charge in Praia do Forte".*

The "*we"* feeling also seems to originate from sharing common values and ethical behaviour since various participants (e.g. Cody, 1_I_14, Lisa, 4_I_30, Ryan, 23_I_5) emphasised that the local population does not cause problems, but deprived people, who come from outside to find a job, bring violence to Imbassaí. Nonetheless, Ryan (23_I_5) explained that

> *"Imbassaí is still a good place. I am not afraid of walking the streets and going to bars at night. I am not afraid of it. It is not like a big city, for instance, like Salvador. There it is much more violent than here".*

Groups of actors "outside"

The key groups of actors outside the destination consist largely of private and public actors (see: Figure 7-2).

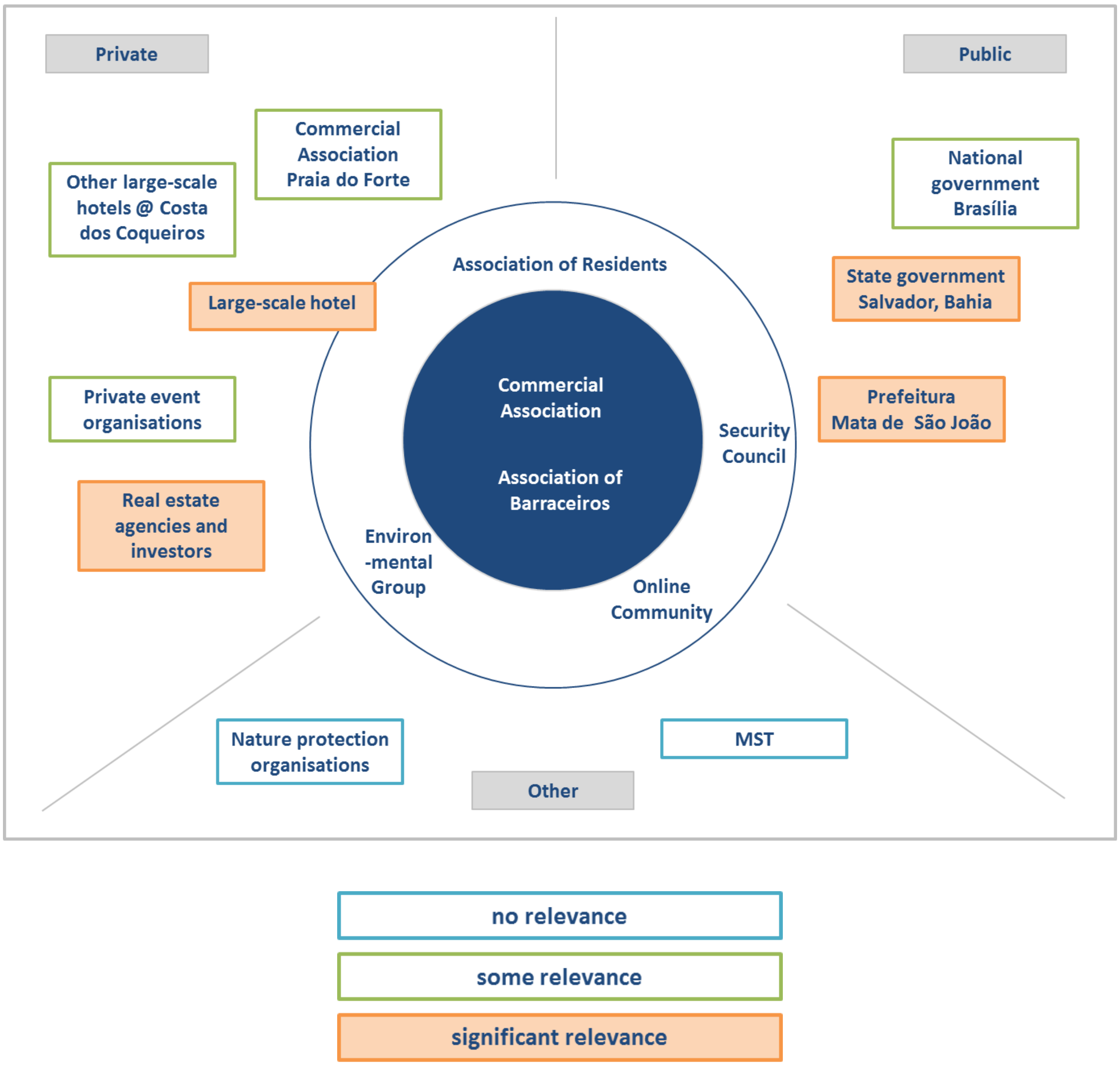

Figure 7-2: We and they - actors in- and outside
Source: Author

In terms of the public sector, reference was made to institutions at municipality, state and national level; in terms of the private sector, a large luxurious all-inclusive hotel and resort that is located in Imbassaí, but in distance to the destination centre (see: Section 6.2.1. Tourism supply: the local tourism value chain) and several other large-scale hotel complexes in the region of Costa dos Coqueiros were identified as actors.

Central discussion points in interviews were also real estate agencies and investors, and how they influence development in Imbassaí. Some participants commented on the Commercial Association in Praia do Forte and private event organisations. Others (e.g. nature protection organisations, Landless Workers' Movement - Movimento dos Trabalhadores Sem Terra, MST) were mentioned by participants, but not discussed in-depth.

7.4.2. Power relations

To investigate power relations among the identified actors at different spatial scales, perspectives of the different socio-economic groups are presented.

Perspectives of poor-income participants

Poor-income participants commented primarily on power relations between their group (often representing local micro-entrepreneurs) and foreign tourism business owners at the local level and the Prefeitura at the municipal level.

While tourism, in general, is seen by poor-income participants as 'something that brought the better' (see: Section 7.2.2. Value of tourism development), their perceptions change when considering the agents behind tourism development. There is a strong perception that these agents, tourism business owners, *"only think about themselves"* and *"just think "to have, have, have" and stop"* (Keily, 36_I_15_2). Keily (36_I_15_2) expressed that

> *"The people who have influence, they always think "for me, for me, for me". They do not care for others - for people who do not have the same money, the same car as they have. So, they should think about this. They should stop being egoists. It would change a lot, if they think about the next. They do not give much support. They do not think about the next".*

Keily (36_I_15_2) described *"the people who have more, the pousadeiros"* as the *"superiors"* and the natives as the *"inferiors"*. She (36_I_15_2) strongly felt that

> *"these people [=the pousadeiros] think they are better than we are… for example, their clothes and my clothes. People think that they are better than I am, because of their clothes, their dresses or the money they have. It shouldn't matter what clothes people wear. Why is a person wearing all cool clothes better than a Bahian?".*

She (Keily, 36_I_15_2) added that

> *"They [= the pousadeiros] will always think that they are superior. And people THINK they [=the pousadeiros] are better. For example, people think that your clothes are better than my clothes. When I go to a shopping centre, I go there as Bahian, dark hair… You will see a difference. How will you be treated? You will be treated by your appearance. Chic, well-groomed. The person will be more hospitable towards you. Even if you do not buy anything, you will be very much welcomed, because of the fact that you are well-groomed. Do you understand? The people are very much like this, unfortunately".*

She (Keily, 36_I_15_2) further expressed that the natives' way of life is not appreciated by pousadeiros:

> *"the pousadeiros did not like it; so, they called a person at the Prefeitura. And because of this, we cannot have this event anymore on Saturday here at the square. So, they only think about themselves. They do not think about the people who work the whole day, the whole week, and when the weekend comes they just want some good music… we do not have money to organise a big event that costs money. We cannot pay that. That event was for everyone".*

Rachel (5_I_15) confirmed that

> *"they [=the pousadeiros] pass their issues to the Prefeitura. And the Prefeitura acts. This is how they have influence. So, when these people, do not want me here… in my barraca selling coconut, they talk to the Prefeitura and say "This is not right. We don't want this anymore." And then they [=the Prefeitura] come here and take me".*

Bridget (12_I_29) stated that

> *"I started selling things to tourists many years ago in the front of the hotel, but then they didn't want me there any longer. They said I can sell at the bridge; so, I went there. I sold my things under a beach umbrella, but when it was windy, I got soaked. So, we talked to them [=the prefeitura], and they released this place here for me to sell. When I started selling here, it wasn't a barraca; it was also under a beach umbrella. I put all things on a table, the table under the beach umbrella and sold the things. And afterwards, they [= the Prefeitura] allowed us*

> *to build this little barraca. Maybe in future I cannot have my barraca anymore. Maybe they do not want a small kiosk, so I need to close my place".*

Accordingly, participants did not only feel that tourism business owners, mainly pousadeiros, together with the Prefeitura, place limitations on their way of life, but can also impact on their livelihoods by hindering them from generating income. Rachel (5_I_15) added that they, the pousadeiros and Prefeitura, decide what type of tourist they want and put boundaries for those types of tourists they do not want. She (Rachel, 5_I_15) stated that tourists are *"more selected"* and explained that

> *"they [=the Prefeitura] separate "the poor" from the "the rich". They, the poor, take the bus to Imbassaí; but, the bus stops there is at the street… so, they need to walk from there to here. And the rich have cars and they can enter Imbassaí and park here. It is a difference, isn't it?"*.

She (Rachel, 5_I_15) added that *"it is because the pousadeiros do not want them to enter"*. This perception was also shared by Keily (36_I_15_2) and Bridget (12_I_29) who stated that "*buses cannot get in here, because the pousadeiros do not let them enter".*

The Association of Residents is considered *"not to have influence to change things"* (Rachel, 5_I_15) and *"cannot compete"* (Keily, 36_I_15_2). Rachel (5_I_15) explained that *"they [=the pousadeiros] have more influence. I have no influence at all. I am small and they are big. I do not have any power to give orders."* Keily (36_I_15_2) added that

> *"they have more influence. For example, they have a pousada, they have friendships with people and they can talk to them and tell them "We don't like this. This is wrong". And the person in the Prefeitura agrees with them, comes here and says "this is wrong" and takes the person away. It is like this: Who has money, can order. Who does not have money, cannot stay and needs to leave".*

Accordingly, poor-income participants strongly agreed that the Prefeitura seems to act in favour of well-established tourism business owners represented in the Commercial Association, while they do not feel any support (e.g. Matt, 2_I_24; Lisa, 4_I_30; Rachel, 5_I_15; Emil, 32_I_9). Matt (2_I_24), for example, who is a craftsman as part of a hippie-community, expressed that he feels a lack of representation by stating that *"ideas of our community are not valued. Overall, I feel that crafts are not valued. We need more opportunities for local craftsmen, for example, infrastructure or maybe a fair".* He (Matt, 2_I_24) continued by arguing that this should be

> *"independent of the political party. It is always about the political party, not about an issue itself. Really, we do not need politics in the middle. A craftsman is a person who deserves appreciation. We are locals and deserve a decent space to work".*

To develop the required infrastructure i.e. a decent space to work, he (Matt, 2_I_24) pointed out that support from influential people is necessary

> *"So, I think improving the local infrastructure depends on institutions, the Secretary of Culture or the Prefeitura. The pousadeiros are people who have most influence in Imbassaí - they should also help to improve the infrastructure. It also depends much on people who need the infrastructure, for example, who take part in a fair. We need collective rather than individual thinking. Everybody needs to believe in the community. That would be very good".*

Perspectives of low-income participants

Low-income participants mainly described power relations between employee and employer (local level) and in service encounters between employees and tourists. In more general, they commented on their perceptions of the Prefeitura's interest and influence in tourism development.

Employee-employer relations

Power in employee-employer relations was mainly shared by low-income individuals working in the accommodation sector (e.g. Leo, 18_I_22, Luke, 19_I_21; Adam, 22_I_2). Leo (18_I_22) explained class divisions in Imbassaí by stating that

> *"There is a superior class here, the bourgeoisie. The bourgeoisie likes to party. Having parties and living in luxury. They have contact with people from other social classes. But: are they friends? No, because, within their class, they talk only bad about these people from other social classes. They are not friends. They are only friends among themselves. Business people. White men. Only these people. The Brazilians, who have money. The people who decided to live here. The people from São Paulo, Rio de Janeiro, who opened a hotel in Imbassaí. The pousadeiros".*

He (Luke, 18_I_22) provided an example:

> *"It's like the situation here [=at his workplace]. Recently there was a party, it was the birthday of my boss. A few business people came and*

> *not one of these business people was black. But: we are in Bahia, the black country. […] In general, the bouregiosie in Imbassaí are white Brazilian businessmen living in Imbassaí and the proletariat are the locals who work in the businesses and were forced to live outside Imbassaí".*

Despite these clear class divisions between employers and employees, participants also communicated their appreciation for their employers in providing jobs and showing care. Luke (19_I_21), for example, stated that

> *"A good thing tourism brought is passion for people, because there are many good people here, there are many people who are good employers. The people who care about us [=the locals] are the people who provide jobs. For example, if I have an issue at home and I need money, I can ask my boss, and he gives me my salary in advance. He does not need to do that. If someone of my family is unwell, he [= my employer] will come by and offer support. So, if they [=the business owners] can, they will help. They embrace their employees as if they were family. I think these people are very, very important for us".*

While both participants, Leo (18_I_22) and Luke (19_I_21), work in a pousada, working conditions including employer-employee relations were explained differently in the hotels with participants communicating a lack of interest among the management in their staff and staff development - as discussed previously.

Service-staff and tourist encounters

Participants started from describing general challenges of working in tourism to taking a more critical view and ultimately to outlining disrespectful and racist behaviour of tourists, particularly by domestic tourists, towards tourism staff (e.g. Finn, 6_I_28; Tilly, 7_I_6; Colin, 8_I_20; Adam, 22_I_2). Adam (22_I_2) described that working in tourism is equipped with difficulties, because every guest needs to be treated individually to ensure everyone has the best possible experience. In contrast to Adam, Colin (8_I_20) did not consider this as a general challenge; however, he took a stronger view on tourist behaviour by stating that

> *"I see many things. I see people who are educated, people who are less educated, people who have patience, people who do not have patience, people who humiliate the waiter. […] In the restaurant, where I work, I encounter these things very often. Clients who shout at me and who are angry with me, they get agitated and furious. I experience such behaviour as a waiter. Over the past years, I saw this [=behaviour]*

> *growing, growing, growing and growing. And I served, served and served. So, the people are changing…. they are changing… more to the other side. Not for the better. They are changing to the worst".*

He (Colin, 8_I_20) further explained that

> *"I do not want to encounter more inconvenient situations with people who are badly educated. Just because I work here doesn't mean that people can do everything. So, I am a person who is very patient. I have much patience. […] You can ask me once, twice, tree times... all good. But when people start shouting at me, my patience is over."*

Colin (8_I_20) also drew attention to racist behaviour of tourists, particularly, highlighting one specific experience, when a white Brazilian customer required that the owner, a white European, prepared the food instead of a non-white chef from the local area. While Colin explained to the customer that the chef learned from the owner how to prepare the food and does it exactly the same, the customer responded that he does not want a non-white employee to prepare his food. Because the owner was not available, the customer left the restaurant. Finn (6_I_28) expressed similar experiences and came to conclusion that

> *"Today, in this time, you can see that racism still exists. For many years, racism has existed. And until today, it exists. And until tomorrow, and until later, it will still exist. It won't change. These are things that do not change".*

Frequently, disrespectful and racist behaviour was linked by participants to domestic tourists. Tilly (7_I_6), for example, stated *"Foreigners are better, because they are more educated. There is a difference. There are only a few, who are not "chatos" [annoyed]. The Brazilians... there are a few "legais" [cool], but most of them a "bens chatos" [=very annoyed]"*. Colin (8_I_20) commented *"The internationals, they are very nice people. Very sincere. Since I work in this area, they have always been good and friendly".*

Interest and influence of the Prefeitura

Low-income participants communicated that they do not see interest and initiative by the Prefeitura in supporting tourism development (e.g. Finn, 6_I_28; Oscar, 15_I_3; Luke, 19_I_21; Otto, 21_I_27; Adam, 22_I_2). Oscar (15_I_3) pointed out that *"they [=the politicians] do not do anything"* and *"tourism is not of interest for them"*, because they focus on other industries that bring greater personal benefits. Thus, Finn (6_I_28) concluded that *"They do what they want, the politicians".* Luke (19_I_21) further emphasised that *"we [=the locals] work much, but we have little. The taxes from tourism are not used to maintain the city. This is very complicated, because we have to deal with the mismanagement of politicians".* As a result of disinterest and mismanagement of politicians at the municipal level, participants described that tourism development lacks initiative as Adam (22_I_2) stated that

> *"what we need here is greater initiative of the Prefeitura in Mata de São João. And it [=tourism development] needs incentives provides by the Prefeitura for businessmen, incentives to do things differently. However, the Prefeitura does not do this. The Prefeitura is very rigid and strict; it stops initiatives, instead of providing space to do something differently".*

Perspectives of higher-income participants

Higher-income participants, mainly foreign tourism business owners, described their perceptions on power relations between tourism businesses owners and locals, and between the Commercial Association and the Prefeitura. In terms of power relations between the Commercial Association and the Prefeitura, higher-income participants drew specific attention drawn to the lack of engagement of Gringos (non-Brazilians) in the Commercial Association and the importance of the large-scale hotel and resort. Furthermore, participants commented on the interest of the Bahian government in tourism development.

Tourism business owners and locals

As pointed out earlier, poor-income participants (mainly local micro entrepreneurs) commented that they feel inferior and powerless towards foreign tourism business owners. In that respect, Amy (13_I_19), a foreign business owner, observed the division between locals and foreigners. She (Amy, 13_I_19) described that

> *"And it's true, when I speak to the REAL locals, I can feel a "that's strange". For me personally, I don’t feel being "in one group" and I don't feel like being "in the other". For me, physically, I am an owner, a white owner of a pousada. But, I do not go to parties with them [=with the group of white business owners]. I do not speak to them. I am not close to them. If at a party, for example, I see Matthew and Ryan, and I can see my employees or friends of my employees, I go to stay with them, because I feel closer to and less judged by them than by the other owners. But physically obviously I am more in their group. So, when I go and speak to the locals, they are a bit: uh, you are coming to speak to us!? Which is quite strange. But as such, I would never go close to the owners".*

She (Amy, 13_I_19) continued by arguing that

> *"I think in Imbassaí everybody knows that we will say THANK YOU, even if it is a homeless person. I will say PLEASE, I will talk to them, I say Good morning - which at the beginning was a real shock for people. They would say: why would you say please? Why would you say thank you? I mean, it's human. I wouldn't give orders to people. For example, we had to cut grass here, and my neighbour [=another white business owner] said you need to "fiscalizar". Fiscalizar. Fiscalizar is not to tell people off, but fiscalizar is what the Prefeitura does. Fiscalizar is like to forbid. He said: you need to "fiscalizar" your employees, when they cut the grass. I said: Fiscalizar? No, I just need to look what they are doing. I DON'T need to. You know, it was really a superior kind of word. That's the way people talk to them. And NO, that has never been my way. So, now, everybody knows that. Everybody knows that I am more easy-going. But everybody knows also that I don't spend parties with the WHITE FOREIGNER people. And everybody knows that I don't REALLY spend parties with the locals, because I am not. I am not a real local. They see the difference."*

Thus, Amy's (13_I_19) perspective as an outsider corresponds with local people's perceptions.

Furthermore, the feeling of superiority among foreigners and higher-income participants became evident in their narratives. For example, Cody (1_I_14) commented that *"I was the king here"* because he had a better socio-economic background than locals characterising his superiority. Theo (14_I_4) described local people as *"very simple-minded".* Frequently, higher-income participants also referred to people's work-ethics, in that locals are described as not reliable and lazy.

Imbassaí and the Prefeitura

Tourism in Imbassaí generates revenues - which benefits the whole municipality of Mata de São João, in that tax is redistributed to advance infrastructure or services for locals and tourists. In that regard, higher-income (and also low-income) participants reported that Imbassaí does not receive an adequate share of tax-income from the Prefeitura - instead they argued that monetary benefits generated in Imbassaí are not used to improve tourism infrastructure in Imbassaí, but general infrastructure in the municipal city of Mata de São João (where decisions are made) (e.g. Amy, 13_I_19; Theo, 14_I_4; Tony, 17_I_1). Theo (14_I_1) explained that the city of Mata de São João is dependent on revenue from tourism at the coastline since Mata de São João itself does not have an economic sector.

Theo (14_I_4) and Tony (17_I_1) further pointed out that the money from tourism is used to gain political support from the public. Tony (17_I_1) explained that

> *"taxes are directed to Mata de São João. Mata de São João arranged to have a famous singer for 20,000 Reais [=GBP5,000]. And here, the school does not have paper, the health-centre does not have bandages, because there is no money".*

He (Tony, 17_I_1) added that *"a band for 3,000 Reais [=GBP750] was supposed to be here, but there was no money available. However, 20,000 Reais [=GBP5,000] to have a singer in Mata de São João was available".* Referring to the same event, Theo (14_I_4) stated that it was done *"to cheer up the voters for the next election in order to get their votes".* He (Theo, 14_I_4) expressed that *"people here are very simple-minded. They think: "Oh, he organised a great party for us, so we need to vote for him".*

Several higher-income participants (e.g. Amy, 13_I_19; Theo, 14_I_4; Tony, 17_I_1; Richard, 33_I_25) pointed out that the Prefeitura did not 'cheer up' all voters since the local population in Imbassaí was unhappy with the decision of the Prefeitura. The population demonstrated political power by using social media as a tool to communicate their unhappiness. Although the decision was not to be changed (since it was only uncovered after the event), participants (e.g. Freddy, 11_I_17; Tony, 17_I_1; Richard, 33_I_25) agreed that the locals made their voice heard.

As shown in Section 7.3.2.2. Societal benefits and costs, lack of planning and control in relation to tourism development and second home development resulted in environmental destruction of protected areas. Henry (24_I_23), for example, explained that *"Imbassaí grew extensively. However, planning did not happen alongside. The Prefeitura did not plan the growth"* (Henry, 24_I_23), which was supported by Amy (13_I_19). Henry (24_I_23) observed that

> *"Today, I can only see that buildings, condominiums, are constructed everywhere, but I do not see any attempt to improve the sewage system, to improve safety, to improve lighting and to improve the streets. Today, the government, the municipal government, does not take care for these things. I think there should be better planning that is in line with the growth of the place".*

Recently, a local environmental group incorporating people from all socio-economic groups has been formed that uses social media to publicise these issues and thus puts pressure on the Prefeitura to act (e.g. Tony, 17_I_1; Richard, 33_I_25). Richard (33_I_25), for example, pointed out that due to pressure by the environmental group the large-scale hotel and resort was made responsible for discharging sewage water into the river. Tony (17_I_1) further showed that not only anonymously people protest, but take action publicly:

> *"This is a collection of signatures. EMBASA [Empresa Baiana de Águas e Saneamento S.A. - Water company of the Bahian state] had to check the quality of the water for two years, which came into force due to public pressure. But EMBASA stopped doing so. The state regulatory agency INEMA does not take responsibility to control the quality of the water due to costs. So, we reported this and collected signatures, which was suggested to us by an attorney. We have achieved that EMBASA needs to control the quality of the water by court order. By the way, the Prefeitura was not capable of enforcing this…. or: the Prefeitura does not want that the quality of the water is checked, because the quality is miserable in summer".*

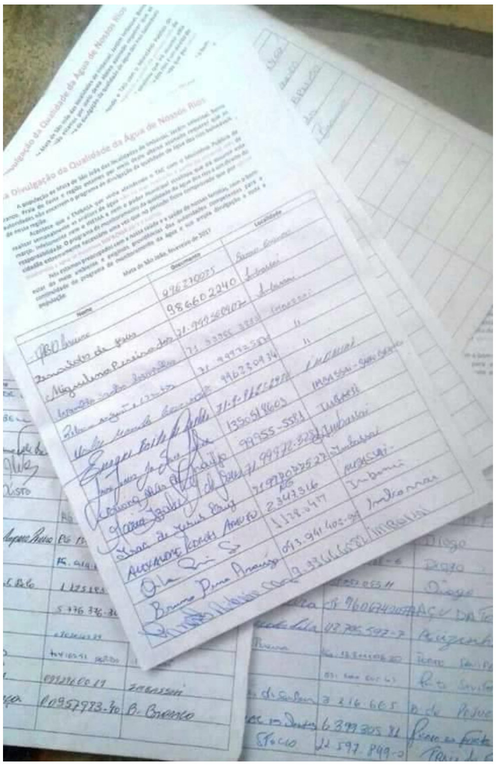

Photo 7-XXXI: Collection of signatures
Source: Tony (17_I_1)

The Commercial Association and the Prefeitura

The Commercial Association was founded almost 20 years ago

> *"mainly by owners of small pousadas. We were the first ones that decided to get together and do this Association. People had the idea, because it is better to have an interface with the Prefeitura, to be a bit stronger towards some things and to be heard. To have a voice. Of course, when many businesses are part of an association, they have greater power in discussions with the major than only one owner of a small business has. That's the main reason why the Association was established"* (Matthew, 30_I_8).

Patty (9_I_13), member of the Association, commented that *"the Association has influence. For sure. The more people, the stronger it gets. Stronger"*. Matthew (30_I_8) explained that the Association mainly consists of Brazilians, whilst non-Brazilians do not engage:

> *"there are many others who are not part of it [=the Association]. They just don't want to be in the Association. They don't think it should be this way. As we say, the "Gringos" because all the Germans that are here are not part of the Association. The French, and the Argentinian as well not. We are mostly Brazilians. All the ones that are part of the Association are mostly Brazilian. I believe there is not a single foreigner part of it".*

He (Matthew, 30_I_8) further expressed that he does not know the reason for their lack of engagement:

> *"I don't really understand why. But we tried and they were never interested […] we talked much about it. We don't have a bad relationship. We do talk and so on, but we already know it makes no sense to try anymore. I don't know. It's maybe a way of seeing the world, if you are not a native of the country. I have no idea. But coincidently, all the foreigners that have businesses here are not part of the association".*

Dana (3_I_10), an Association member, also drew attention to this and pointed out that

> *"I think there should be a strong association that is formed by people who are more interested in the community rather than "the individual". We do not need an association that represents the interests of*

> *individuals. It should be an association for everyone. I don't know how we can achieve collaboration. One of the great problems we have is that there are many different people who think and behave differently. Natives and Gringos [=foreigners]. The majority of people who have a pousada are Gringos".*

Dana (3_I_10) believed that issues need to be addressed slowly *"with the feet on the ground"* instead of starting *"from the top"* as foreigners want. She (Dana, 3_I_10) argued that a basis for collaboration needs to be established, which can then further be developed. She expressed (Dana, 3_I_10) that

> *"different minds, different ways of thinking and different attitudes generate a lack of common sense. People discuss about unnecessary things instead of things that are required. We lose time by discussing things that are far from reality. We have to do things that are palpable, plausible and achievable".*

Amy (13_I_19), who is not a member of the Association, commented that, in her opinion, the Association follows a wrong approach. She (Amy, 13_I_29) explained that she had participated in meetings twice and nothing has moved forward, for example, in terms of security issues. She (Amy, 13_I_29) emphasised *"it doesn't work for me. They don't THINK. They don't. It's short-term, in the "moment thinking", not very long-term…"* while she also expressed that

> *"I understand that they are not happy with me not participating, because they try to do something and one of their most…. RICH… I mean, I am a pousada-owner, who has influence in Imbassaí, I am not part of the association. […] But their ideas don't work out for me. They don't. But I don't yell at them. "Please, continue your job. Continue doing it because I am not the one who is gonna shout out. Do it for me, please." And at least, if some laws go through (even if I don't like them), it's moving. At least, there are things moving".*

The difference in views and approaches was linked to two groups: Brazilian business owners, who are part of the association, and non-Brazilian business owners, who do not engage in the activities of the association. Non-Brazilian business owners argued that they do not engage, because they do not see any progress since all meetings only involve discussions without making decisions and planning actions; if decisions are made, they feel that there is no long-term vision, but only short-term solutions. In contrast, Brazilian business participants feel that foreigners neglect the circumstances in Brazil - thus, suggesting approaches that are *"far from reality"* (Dana, 3_I_10). Dana

(3_I_10) emphasised this by arguing that *"things work differently here in Brazil. Slower. They [= German business owners] cannot assume it works like in Germany. They cannot just use the German approach here. We are not in Germany".* As a consequence of these opposing views and approaches, these two groups do not work collaboratively in the association - instead the association only represents Brazilian business owners. An association with both groups working together was perceived to be stronger and more influential in enacting progress and change (e.g. Dana, 3_I_10, Patty, 9_I_13; Matthew, 30_I_8).

Henry (24_I_23), who was, but is no longer a member of the Association, commented that people who are in charge of the association *"do not want to fight with public powers"*. He (Henry, 24_I_23) explained that the Association does not address issues sufficiently with the Prefeitura, in that *"complains are not made"* and thus *"things cannot be fixed"* and *"will continue to happen"*. In contrast, Dana (3_I_10) considered that the association has only limited power to influence tourism development in context of the whole tourist region:

> *"The association has very little influence. Very little. The municipality of Mata de São João is very large including Praia do Forte, Imbassaí, Sauipe. However, Imbassaí does not have a name, it's not known well, but the other places are. Therefore, Imbassaí is somewhat abandoned and not supported by public institutions. The politicians here, they do not fight enough to improve things".*

Participants further expressed that the Prefeitura prioritises and delivers benefits towards tourism development in Praia do Forte (e.g. Theo, 14_I_4; Tony, 17_I_1, Ryan, 23_I_5; Richard, 33_I_25). Ryan (23_I_5) pointed out that

> *" Praia do Forte is very important as a tourist place. It is known all over Brazil. It is important and because of that, I think, all people invest there. […] But here in Imbassaí, we don't have that. Everything, you do in Praia do Forte, you can be sure, you earn money. So, there are many 'empresarios' - business men, business people, that like to invest, because they know they get money back from it. And, you know, Praia do Forte is kind of high class tourism, so Praia do Forte has rich houses and much more pousadas than here, in Imbassaí. The population in Praia do Forte is bigger. Here the population is much smaller".*

Matthew (30_I_8) confirmed the strength of Praia do Forte by emphasising

> *"Praia do Forte has one [=association] that's very strong; of course, they have many more businesses. But we here, we have our Association. But we can't do as many activities as the one in Praia do Forte. That's a consequence of the fact that we are much smaller and we don't have as much money".*

While Ryan (23_I_5) believed that Praia do Forte receives more funding from the Prefeitura due to its size and importance, other participants (e.g. Theo, 14_I_4; Tony, 17_I_1; Richard, 33_I_25) commented that politicians have greater interest in investing in Praia do Forte since they own places in Praia do Forte - thus, pursuing personal interests in developing tourism in Praia do Forte. Due to the emphasis on Praia do Forte, participants felt that tourism development in Imbassaí is neglected (see also: We and They in Section 7.4.1 Actors in tourism). In fact, the perception that officials of the Prefeitura act in their personal favour was frequently communicated. Theo (14_I_4), for example, stated that *"money goes into the pockets of politicians"* and other participants (e.g. Amy, 13_I_19; Tony, 17_I_1; Henry, 24_I_23; Richard, 33_I_25) had no doubt that 'Prefeitura and corruption go hand-in-hand'. Tony (17_I_1) provided an example by explaining that "*the public administration needed seven years to organise that the large-scale hotel and resorts stops inducing sewage water into water sources".* He (Tony, 17_I_1) added that the Prefeitura did not see any wrong-doing instead it was communicated that *"everything is ok"*. Tony (17_I_1) was convinced that the Prefeitura *"of course, received money"* for this. Only because of external pressure from the environmental group (as mentioned in the previous section), the Prefeitura acted.

Similarly, the priority of second home development of the Prefeitura was perceived to contribute to personal interests of politicians as Tony (17_I_1) explained

> *"the Prefeitura does not have any [raises his voice] interest in developing tourism, because the Prefeitura is in the hands of the real estate mafia. […] The politicians receive more money from constructions because they are involved in these development companies. It's a triangle game. One person has land, the second builds and the third one operates the condominium".*

What reinforces people's perceptions on the Prefeitura's objective of second home development was observed by Richard (33_I_25) in arguing that *"for example, they built at places, where we thought that it was forbidden to build. Just in front of the beach. A very large condominium".* Many participants explained that constructions are built illegally without intervention of the Prefeitura, which they, particularly, emphasised by taking photos. In reference to a photo (see: Photo 7-XIX: Illegal construction), Tony (17_I_1) explained *"It is an illegal site, I would say it will be an illegal condominium, which is built on public land and not impounded by the Prefeitura, because the owner is an "amigole" [a friend] to a politician".* Accordingly, he (Tony, 17_I_1) considered that the lack of control by the Prefeitura as returning a favour to influential families. Thus, he (Tony, 17_I_1) concluded *"it is about POWER!! Power and influence".* Amy (13_I_19) agrees with Tony (17_I_1) that it is about having networks. She (Amy, 13_I_19) stated that if you are not part of the network *"you need to give people extra money, otherwise you can wait, wait and wait… and you do not get things done. It is what I am doing, unfortunately".*

To be stronger and more influential, there is great interest by representatives of the Commercial Association to create a network with the large-scale hotel and resort that was considered to be influential (Dana, 3_I_10; Anna, 16_I_1; Matthew, 30_I_8). Dana (3_I_10), for example, stated that *"they [=understood as owners and managers of the large-scale hotel and resort] have influence. They have influence because of the money".* However, Anna (16_I_11) pointed out that they do not have interest, when it does not concern their business by stating that *"they do not change things that are not of their concern. They change things that are in their space [= in the hotel and resort complex], but not here".* She (Anna, 16_I_11) further explained that the hotel and resort has established a well-functioning infrastructure for their employees, so that they do not need to leave the complex:

> *"here, for example, you rarely see people who work in the large-scale hotel and resort, because they usually live in the complex. There are some people here, but the majority lives there, because there is a good infrastructure that is offered to them".*

She (Anna, 16_I_11) continued by arguing that

> *"The hotels have their own infrastructure and they also have their own private beaches and tourists only stay there. It is very seldom that tourists take a short walk to come to our side, to see the barracas here. They stay there, because there is an entire infrastructure. They eat there, have drinks and undertake activities. So, they do not buy anything from businesspeople here. So, it is difficult for us".*

In contrast, Matthew (30_I_8) recognised the value of large-scale development, specifically, for the Association in providing money for example to restructure the police station, and concerning wider public issues by arguing that

> *"if they [=the large-scale hotel and resort] were not here, all these young people, would probably, if they had money, smoke pot. They would kill someone to buy crack. I think it's very [=to have the large-scale hotels in the region] important, definitely. Because the big hotels, they bring jobs to the people here. There would be no other means of survival in this region. There are not enough coconuts for everyone to survive. And people are not monkeys, so, I think the hotels are indispensable and I want them to be here - of course, they should respect the characteristics of the place. When the large-scale hotel and resort decides to devastate an enormous area and to throw sewage in the river as they DID, that's another issue. And we had a problem with the large-scale hotel and resort, because sewage was thrown in the river. And when they decided to build a hotel on the dunes, everybody was against it and the public defender just said they couldn't. AND THEY DIDN'T [he says this with a surprised voice]. They had to build the hotel behind the dunes. We had situations like this. But overall, I think, they [=the large-scale hotel and resorts in the region] are important".*

He (Matthew, 30_I_8) added that

> *"It is positive, in this sense. And I don't demonise the hotels, I don't think that. This is a touristic place. Tourism doesn't live without big investments. Tourism is an expensive investment. Not only people, but, well, there is a whole chain. So, you can't depend only on small businesses. Ok, it is very good to have small cosy restaurants, bars and so on. But you also need an enormous all-inclusive".*

Interest and influence of Bahian government in tourism development

Alongside the perceived disinterest in tourism development, whilst pursuing a strategy of second home development due to increasing benefits for the Prefeitura, participants also expressed that higher public institutions do not have an interest in tourism (e.g. Amy, 13_I_19; Theo, 14_I_4; Tony, 17_I_1; Henry, 24_I_23; Matthew, 30_I_8). Tony (17_I_1) reasoned that *"tourism is not considered an industry. It is something you simply have".* According to Matthew (30_I_8)

> *"something like until 15 years ago - there was a stronger focus on tourism. Much stronger! And then the PT government, the left-wing government, came. And it's not something they REALLY want to focus on"*.

He (Matthew, 30_I_8) further explained that

> *"Bahia had great, great development in tourism in comparison to many other states in Brazil, because, for many years, there was a focus on tourism. Some governors of Bahia, they really thought that the state has this potential, so they focussed on tourism development. […] Now, things are different, because this government does not spend any money on tourism. So, there is almost no investment. I think it is kind of an ideological bias. […] They don't see tourism as something important for the economy".*

Similarly, Ryan (23_I_8) identified lack of institutional support and lack of investment in tourism at the state level; thus, he (Ryan, 23_I_8) argued that what is needed is *"Investment. It needs money from the government. Money from the government of Bahia. Money from the major of Mata de São João".*

Henry (24_I_23) explained that support by public institutions and programs for tourism development have been decreasing by stating that *"we had one, two agencies that supported tourism development. We had a very active EMBRATUR, in Bahia we had BAHIATURSA*[50] *that undertook much investment into marketing. But this does not take place anymore; BAHIATURSA does not exist anymore in its original structure."* He (24_I_23) emphasised that *"12 years ago, BAHIATURSA invested more in marketing and fairs to promote Bahia than EMBRATUR spend for whole Brazil".*

Henry (24_I_23) added that

> *"So, the government stopped to put policies regarding tourism development in place. The politicians who succeeded the President did not touch existing projects and pushed them further. For example, in Bahia, for each region, there was a specific working plan in place to foster tourism development. However, today, this does not exist anymore".*

[50] BAHIATURSA (Empresa de Turismo da Bahia S.A.) was established in 1968 as an independent agency with linkages to the former "Secretariat of Municipal Affairs and Urban Services" (Secretaria dos Assuntos Municipais e Serviços Urbanos). In 2015, after several restructurings, BAHIATURSA became incorporated into the "Secretariat of Tourism of the State of Bahia" (Secretaria de Turismo do Estado da Bahia, SETUR) as "Superintendência de Fomento ao Turismo do Estado da Bahia" with the aim of managing and implementing tourism development policies and promoting the state as a tourist destination.

Richard (33_I_25) stated that BAHIATURSA was always relatively weak, but at least there was some effort; he (Richard, 33_I_25) adds that since the agency does not exist anymore as it used to be, nothing has been happening with the consequence that tourism in Bahia is *"alarmingly weak".*

Tony (17_I_1) argued that neither institutions of the state of Bahia nor at the national level advance and support tourism development. He (Tony, 17_I_1) emphasised that all development projects and initiatives are privately organised: *"The project TAMAR [=sea turtle project in Praia do Forte] is privately organised. Jubarte [=whale watching in Praia do Forte] is privately organised. The pousadas and hotels are by private investors and owners. So, what have public institutions done? Nothing".* Amy (13_I_19) and Theo (14_I_4) also agreed that tourism development needs more attention by public institutions, particularly, at the national and state level to promote Brazil and Bahia as a tourist destination internationally, and to develop the required infrastructure for tourism. Anna (16_I_11), Henry (24_I_23) and Matthew (30_I_8) commented that unless the mentality and thinking of public institutions towards tourism development does not change, change will not happen. Henry (24_I_23) pointed out that

> *"If there is no change in thinking by public bodies, if there is no maturation of the entrepreneurs here, I do not see a difference here in Imbassaí in the next 10 years. Actually, I think it will be worse. We need joined forces to avoid deforestation; we need to force the Prefeitura to improve infrastructure, clean streets, lightning on sidewalks, so that tourists can walk through the city without being scared. Today, this does not exist. If an improvement of basic services such as health-care and transport infrastructure does not happen, I do not see a good future".*

7.5. Conclusion

This chapter presented the study's results illustrating participants' perspectives through the use of quotes and participant-generated photos. At first, by highlighting perspectives of participants, it was shown that tourism development underwent significant changes over the past 25 years - starting from almost nothing to small-scale tourism development, and further to large-scale tourism development with both today, small- and large-scale, co-existing. Participants agreed that tourism brought a better quality of life through providing jobs and income, and having access to further goods and services. On the other hand, participants drew attention to the dependency on tourism, individual challenges and arising societal problems due to tourism development. These benefits and costs were further unpicked in the next section by analysing the value of tourism-related income through patterns of consumption and examining valuable opportunities for different socio-economic groups (Objectives 2 & 3).

After having analysed the value of tourism-related income through patterns of consumption and examining valuable opportunities for different socio-economic groups to explore the relationship between tourism, poverty and inequality, the chapter moved on to the theme of tourism and power identifying different actors and investigating power relations at different spatial scales (Objective 4).

These results are discussed in the next chapter with consideration given to the literature previously reviewed.

8. Discussion

8.1. Introduction

This chapter discusses the results of the study in relation to the relevant literature. The first section focusses on exploring 'poverty and inequality in a tourism context' by discussing the study's results in relation to Sen's capability approach. The next section 'political economy in tourism' firstly outlines and discusses dependency relationships in tourism within and between different spatial scales using Frank's dependency theory. This is followed by an evaluation of power relations in relationships within and between different spatial scales using Giddens' structuration theory. Throughout the discussion reference is made to the relevant tourism literature. The chapter closes by providing a conclusion.

8.2. Poverty and inequality in a tourism context

This study has aimed to explore the relationship between tourism, poverty and inequality using Sen's capability approach. Sen (1995a) refers to capabilities as the real opportunities a person can choose from to achieve a set of functionings. Fukuda-Parr et al. (2013:228) explain that the difference between functionings and capabilities is between *"the realized and the effectively possible"* or between *"achievements [...] and valuable options".* To achieve the aim, this study explores capabilities, the real opportunities, provided by tourism and analyses how tourism contributes to achieving these from the perspectives of different socio-economic groups living in Imbassaí - a coastal destination in the municipality of Mata de São João in Bahia in the Northeast of Brazil. To do so, capabilities are conceptualised using income, consumption and further valuable opportunities provided by tourism (see: Chapter 3. Conceptual thinking).

Tourism-related income - key for achieving functionings of poor- and low-income individuals

Tourism is considered as a promising industry to deliver benefits for local communities, particularly, for poor people (Ashley & Mitchell, 2008). In Imbassaí, tourism is the main economic sector and represents almost the 'only' opportunity for people living in Imbassaí to generate income (e.g. Franklin, 26_I_12). The local tourism value chain in Imbassaí encompasses accommodation, food and drinks, shopping and entertainment/activities. Most of the industry's turnover of GBP54 million is generated in the accommodation sector (GBP52 million = 96%), GBP1.7 million is generated in the food and drinks sector, and the two remaining sectors, shopping and entertainment/activities are almost insignificant (with GBP0.3 million) in comparison to the industry's overall turnover.

Tourism can deliver monetary benefits to local communities both directly and indirectly (Mitchell & Ashley, 2010). In terms of direct benefits, the tourism industry in Imbassaí provides income to poor-income and low-income groups, which confirms Blake et al.'s (2008) study that identifies that tourism has a positive effect on the lowest- and low-income groups of Brazilian society. Particularly considering that prior to tourism development *"there was nothing"* (Lisa, 4_I_30), tourism development means that local people can earn poor-income through micro-entrepreneurialism and (some people) can also directly move to receiving a minimum salary (low-income) through employment in the accommodation and food and drinks sector. This aligns with Neri and Soares' (2012) study in Porto Seguro (in Bahia, Northeast of Brazil) that shows that tourism impacts positively on employment, income and poverty. In contrast to the industry's overall turnover (=GBP54 million), the impact on both socio-economic groups seems to be fairly small (<GBP1.6 million). Nonetheless, Croes' (2014:222) view that *"tourism development matters"* for lower income levels is supported since the tourism industry represents the main source of generating income for people living in Imbassaí.

In fact, tourism development matters to people - which becomes strongly evident in this study with both poor-income and low-income participants emphasising the importance of tourism-related income (e.g. Matt, 2_I_24; Rachel, 5_I_15; Otto, 21_I_27). Particularly, poor-income individuals describe that income from tourism is indispensable for their survival (e.g. Matt, 2_I_24; Rachel, 5_I_15). Similarly, participants in Dorjsuren's (2014) study and Knight et al.'s (2017) research stress the importance of tourism employment and income generation. The emphasis on tourism-related income (in comparison to other opportunities) supports Sen's (1999) consideration that a lack of income can be a main cause of people's capability deprivation.

The pro-poor impact results mainly from micro-entrepreneurship in food and drinks, shopping and entertainment/activities, and the low-income impact is due to semi- and unskilled work (e.g. cleaners, waiters, cooks) in accommodation and food and drinks sectors. People in poor-income and low-income positions are mainly Northeastern Brazilians from a non-white background (Preto or Pardo). In contrast, it is identified that superior positions (ownership and management) are frequently occupied by white Brazilians from the South, white Europeans (e.g. from Germany, France, Portugal, Italy) and people from other white backgrounds (e.g. Argentina). Accordingly, the tourism industry in Imbassaí mirrors existing inequalities between white foreigners[51] who manage tourism businesses and non-white locals who have to accept foreign dominance in order to generate employment and income. This disparity found in Imbasssaí seems to be a characteristic for the Northern Brazil coastline and is consistent with the classic development patterns found in developing destinations in the Caribbean and South Pacific (Pegas et al., 2015). It particularly supports dependency theory in viewing tourism as a highly unequal industry, as attested by Weaver (1988:323) in arguing that tourism seems to *"perpetuate the structural and spatial inequalities".*

In contrast to poor-income and low-income individuals who strongly emphasise the value of tourism-related income, it appears that income from tourism is not of such crucial importance for higher-income participants as they describe living in Imbassai (and having a tourism business) as a lifestyle choice rather than necessary for income generation (e.g. Amy, 13_I_19; Cody, 1_I_14; Tony, 17_I_1). This phenomenon of so-called 'lifestyle-entrepreneurs' has received attention in the tourism literature (e.g. Ateljevic, 2000; Brenner & Fricke, 2016; Dewhurst & Dewhurst, 2006; Kuratko & Hodgetts, 2004; Getz & Carlsen, 2005). Accordingly, lifestyle entrepreneurs are described as individuals who relocate to another country to create more meaningful experiences, whilst using their professional skills to set up a small-scale business (Brenner & Fricke, 2016; Lardies, 1999). In that regard, several authors (e.g. Ateljevic, 2000; Kuratko & Hodgetts, 2004; Getz & Carlsen, 2005) stress that setting up a business is for lifestyle purposes rather than for making profit. Dewhurst and Dewhurst (2006:13) argue that they aim to generate income *"to ensure that the business provides them and their family with a satisfactory level of funds to enable enjoyment of their chosen lifestyle"*. Similarly, in this study, participants assume pousada owners do not make much profit (e.g. Cody, 1_I_14; Amy, 13_I_19). This perception is strengthened by the fact that the occupancy rate in Imbassaí has always been quite low and due to Brazil's economic and political crisis affecting tourism, the average occupancy rate has been further decreasing during the period of data collection (e.g. Amy, 13_I_19; Ryan, 23_I_5). However, whilst pousadas are affected, it does not seem to influence the owners' lifestyles - thus, suggesting that they can rely on existing or other sources of income. Although pousada owners report that they have to reduce the number of employees during periods of low demand, they do not refer to any lifestyle changes e.g. in terms of travelling abroad or providing education for their

[51] In Chapter 7. Results - Part 2, it was pointed out that even Brazilians from the South are perceived as foreigners.

children (e.g. Amy, 13_I_19; Theo, 14_I_4; Ryan, 23_I_5). Thus, a lack of tourism-related income does not appear to influence the achievement of functionings for this socio-economic group, which is reflected in their consumption patterns.

In terms of indirect monetary flows, it has been established that many secondary products are not available in the local economy, because of a weak backward linkages with the agricultural sector. Thus, secondary products need to be sourced externally with the consequence that a substantial proportion of tourist spending does not stay within Imbassaí. Although it is argued that indirect impacts of tourism on poor communities might be significantly higher than direct impacts (e.g. Meyer, 2007; Mitchell, 2012), this is not found to be the case in this study. Similarly, Wagner (1997) identifies that tourism has little indirect impact on a local economy in Brazil's Northeast since most inputs are sourced from outside. Nonetheless, it needs to be acknowledged that sourcing products externally might have a significant impact on poor communities outside the destination i.e. from where the products are sourced.

How does tourism-related income contribute to achieving functionings? - Analysing patterns of consumption

In this study, income is used as a starting point to undertake further analysis of patterns of consumption. Analysing consumption patterns is crucial since people have different conversion factors between income and functionings i.e. people utilise their income on different commodities to achieve functionings (Alkire & Santos, 2009; Foster & Sen, 1997). While research on tourism and poverty alleviation measures the impacts of tourism on income and the wider economy, tourism research largely fails to analyse patterns of consumption i.e. how tourism-related income is used to achieve capabilities.[52]

All poor-income participants express that with tourism-related income they can achieve basic functionings - the beings and doings that constitute a person's well-being (Sen, 1995a). The basic functionings participants emphasise are being nourished, being sheltered and being healthy (see: Table 8-a) - which mirror the key aspects in the UN's (1995) definition of absolute poverty (see: 2.3.1. Understanding and defining poverty and inequality).

[52] Only Dorjsuren's (2014) study provides some indication.

How poor-income participants use tourism-related income to achieve functionings	
"doings"	"beings"
+ buying food & drinks	being nourished
+ building / renting a house	being sheltered
+ accessing private health-care treatments	being healthy

Table 8-a: Income and basic functionings of poor-income participants
Source: Author

Once these basic functionings are achieved, functionings that are linked to the individual contexts of poor-income participants seem to become more central (see: Table 8-b). Interestingly, all functionings mentioned by poor-income participants are related to work - thus, further strengthening the importance of ensuring income generation. Particularly, considering that these participants are mainly micro-entrepreneurs, the importance of ensuring income generation for them is self-evident.

How poor-income participants use tourism-related income to achieve functionings	
"doings"	"beings"
+ building a barraca [a little kiosk]	being in a comfortable working environment
+ buying a bike	being able to use the day efficiently by going to work faster
+ buying a TV for customers	being able to serve customers' wishes to ensure income generation

Table 8-b: Income and further functionings of poor-income participants
Source: Author

In contrast to poor-income participants, low-income participants did not put emphasis on being nourished - thus, it may be assumed that this basic functioning is already achieved. Being sheltered as a basic functioning, however, is also addressed by this socio-economic group.

Interestingly, increasing material wealth played an important role among low-income participants, which was not found to be the case in Dorjsuren's (2014) study. In this context, it might indicate that through buying a TV, phone, car, etc. people feel more accepted in the community since they own something that is deemed to be customary in the society. In other words, they own commodities that are connected to the status of higher-income individuals; by owning these status-commodities, they feel that they can achieve a higher status and earn wider acceptance and respect in the society (see: Table 8-c).

Similarly, participants in Knight et al.'s (2017) study link being respected to well-being and poverty. This supports the notion that perceptions on people's status are shaped by conditions in the society emphasising the need to not only consider poverty from an absolute perspective, but also to take more relative aspects into account (e.g. Sen, 1983; Spicker, 2004; Townsend, 1979).

How low-income participants use tourism-related income to achieve functionings		
	"doings"	*"beings"*
+	**building / renting a house**	**being sheltered**
+	**buying a TV, a phone, a car**	**being in a higher status and being more accepted**
+	**spending a day at the beach**	**being well-rested**
+	**having a barbecue**	**being around friends**
+	**travelling within Bahia**	**being culturally experienced and educated**

Table 8-c: Functionings of low-income participants
Source: Author

Analysing consumption of this socio-economic group further, functionings related to leisure seem to stand out. To some extent being around friends is mirrored in Dorjsuren's (2014) study[53] that highlights the importance of social networks e.g. having, family, friends and colleagues. The study (ibid) also refers to social connections e.g. with government officials to achieve personal goals and foster well-being, which is not emphasised by participants in this study. However, considering that low-income participants are mainly employees in the accommodation and food and drinks sectors, they are not directly responsible for the success of the business, so that social connections with politicians can be seen as less crucial. The importance of leisure among low-income participants contrasts with the importance of work-related functionings of poor-income participants; however, the different foci are not surprising considering the main job roles of each group: while poor-income participants are mainly micro-entrepreneurs and responsible for the success of their own business to ensure income generation, low-income participants are employed and receive a standard monthly income - even if the business is not doing well.

[53] To note: Dorjsuren (2014) does not refer to any specific socio-economic groups

Even if the business of higher-income participants is not doing well, it does not seem to significantly influence the lifestyle of owners - as indicated in the previous section. In terms of consumption, whilst it is unclear as to whether and to what extent consumption results from tourism-related income, there was a strong emphasis among participants on providing quality school education for their children, which means that children are sent to distant private schools that cost more than a low minimum salary of BR$931.20 per month. In terms of functionings, it can be argued that in paying for private schools, higher-income participants are being able to provide high-quality education for their children who are being educated and which enables them to lead the life they aspire to - which was also identified by Dorjsuren (2014) as a capability (not in relation to higher-income individuals though).

Interestingly, participants from this socio-economic group frequently emphasise which functionings they cannot achieve by having made the choice to live in Imbassaí. These not-achievable functionings include

- Providing high-quality education for their children close-by
- Enjoying culture close-by
- Having diverse opportunities for leisure activities close-by
- Having access to good health-care close-by

Since functionings constitute a person's well-being (Sen, 1995a), not being able to achieve the ones mentioned above influences the participants' overall well-being. On the other hand, tourism (or more specifically: having a tourism business and living in Imbassaí) provides further opportunities that are valued by higher-income individuals.

What further valuable opportunities does tourism provide and how do they contribute to achieving functionings?

An analysis of further valuable opportunities provided by tourism shows that these can be considered as

- individual opportunities i.e. the opportunities that are linked through being directly involved in the tourism value chain and
- societal benefits i.e. the opportunities resulting from tourism development in general.

Interestingly, participants place strong emphasis, on societal aspects rather than individual opportunities, which, particularly, becomes evident in the photos taken by participants. The reasons can be manifold: there might be a strong communal sense, societal benefits might outweigh individual opportunities, or simply that taking photos of more societal aspects is easier to achieve.

Valuable opportunities i.e. capabilities for poor-income individuals who are involved in the tourism value chain, encompass communicating with tourists, having cultural exchange and establishing relationships. These valuable opportunities are also emphasised by low-income participants, whilst adding another layer, in that they draw attention to advancing knowledge through having cultural exchange and establishing friendships through relationship-building (see: Table 8-d).

Both groups, poor-income and low-income, have limited opportunities to travel - thus, having the real opportunity of communicating and engaging with tourists enables them to learn about other cultures, become more culturally aware and educated. Furthermore, since they cannot experience *"the exotic"* (Leo, 19_I_21) through travelling abroad, tourism development brings "*the exotic"* to them. The importance of communication with tourists is also discovered by Oezel and Kozak's (2017) study on residents' perceptions towards tourism development in Cappadocia, Turkey. The study (ibid) further emphasises that communication between residents and tourists leads to greater tolerance towards the other culture. In this study, communicating and having cultural exchange with tourists is foremost described by poor-income and low-income participants as an opportunity to learn about 'the other' i.e. the outside world since they do not have the opportunity to travel abroad. Accordingly, tourism, particularly through communication and cultural exchange, enables access to and contact with the rest of the world for the local community.

Capability sets - further real opportunities provided by tourism		
Poor-income participants	*Low-income participants*	*Higher-income participants*
+ **Communicating with tourists**	+ **Communicating with tourists**	+ **Living in a natural environment**
+ **Having cultural exchange**	+ **Having cultural exchange and advancing knowledge**	+ **Having a relaxed lifestyle**
+ **Establishing relationships**	+ **Establishing relationships / friendships**	

Table 8-d: Capability sets of socio-economic groups
Source: Author

Higher-income participants, on the other hand, seem to perceive living in Imbassaí as exotic since they are mainly foreigners (i.e. white Brazilians, Europeans and other). As such, they do not identify that communicating with tourists, having cultural exchange and establishing relationships/friendships as valuable opportunities; instead travelling abroad represents a real opportunity to them. For higher-income individuals, real opportunities seem to lie in living in beautiful natural environment and having a relaxed lifestyle that is provided by having a tourism business and living in Imbassaí (see: Table 8-d).

Higher-income participants, however, explain that their lifestyle choice constrains them - mostly through a lack of availability of amenities such as high-quality education i.e. private schools, cultural and diverse leisure activities, and good health-care close-by (see: Table 8-e). These amenities constitute aspects valued by this socio-economic group; however, they are not real opportunities since they cannot be achieved.

In contrast to higher-income participants, poor-income and low-income individuals put emphasis on aspects that are much more related to being involved in the tourism value chain. For example, in order to have a job and generate income, some poor-income individuals mention that they have had to move from the interior of Bahia to the coast leaving their families behind. As such, the real opportunity of being with family is not provided through tourism. Similarly, being close to work and having the choice of jobs with better work-life balance are not a real opportunities despite their value. Firstly, prices in Imbassaí have increased tremendously due to tourism and second home development, so that poor-income people have been forced to live in peripheral neighbourhoods. Secondly, since tourism is the main economic activity, they have no choice other than to work in tourism - especially if they are from backgrounds with low education.

Opportunities - not provided by tourism		
Poor-income participants	***Low-income participants***	***Higher-income participants***
- **Being with family**	- **Being treated with respect in the work environment**	- **Providing high-quality education to children close-by**
- **Living close-by to work**	- **Having a good work-life-balance**	- **Enjoying culture close-by**
- **Choosing a job with better work-life-balance**	- **Having personal development opportunities**	- **Having diverse opportunities for leisure activities close-by**
		- **Having access to *good* health-care close-by**

Table 8-e: Non-existent opportunities of socio-economic groups
Source: Author

The issue of limited choices in finding better jobs for poor people with a low education background is discussed in the tourism literature (e.g. Bianchi, 2011; Hampton et al., 2018; Mbaiwa, 2017; Mihalic, 2015; Mutimucuio & Meyer, 2011). In this study, as pointed out in the previous paragraph, the lack of choices extends further, in that people have to move to coastal destinations, where tourism development takes place, in the hope of finding a job in tourism and, if they find one, they often need to live in some distance from the tourist destination. Both scenarios, people migrating in search for a job (e.g. Hoffman, 2011; Wittemyer et al., 2008; Truong, 2018) and people living outside the destination due to increase of prices (e.g. Muganda et al., 2010) are described in the literature.

Low-income individuals emphasise that being treated respectfully by tourists in service encounters, having a good work-life balance and having personal development opportunities are valued; however, in its current form, employment in tourism does not provide these opportunities. Low-income participants often experience the opposite: racism, poor working-conditions and lack of development opportunities. The latter two are widely been analysed by tourism scholars (e.g. Liu & Wall, 2006; Mihalic, 2015; Mutimucuio & Meyer, 2011; Scheyvens & Russel, 2012). In contrast to Scheyvens and Russel's (2012) research, this study does not find that large-scale foreign-owned businesses are more likely to offer more adequate salaries for employees, to respect laws and regulations of working conditions and to make substantial investment in capacity-building and training in comparison to small-scale businesses. Firstly, in terms of salaries, no significant difference in salaries in large-scale and small-scale tourism businesses for unskilled and low-skilled positions is identified. Secondly, participants frequently describe how they prefer to work in small-scale businesses than in a large-scale environment since they do not feel treated respectfully but *"like an outlaw"* (Dawn, 31_I_18) because employees are searched when entering and leaving the resort enclave, and instead of support, they feel pressurised. Thirdly, substantial investment in capacity-building and training is not found to take place for people who earn minimum salaries with the consequence that people have limited development opportunities.

In terms of racism, the literature review of socio-cultural impacts of tourism does not highlight issues of racism in host-guest encounters (see: Section 2.3.4. Poverty and inequality in a tourism context). In fact, Ruhanen and Whitford (2018:6) argue that *"little research has been undertaken to explore the extent to which Indigenous people experience racism and discrimination in a tourism context"*. To date, tourism research tends to examine on the role of racism in preventing success of Indigenous tourism (in Australia), particularly focusing on tourist/ guest perceptions (e.g. Nielson Buultjens and Gale, 2008; Ruhanen & Whitford, 2018; Ruhanen, Whitford & McLennan, 2015). In contrast, this study focuses on perceptions of 'the host' - thus, providing a different perspective on racism than to the existing literature.

In Brazil, which is one of the most unequal nations in the world, inequality is strongly linked to race (Hochstetler, 2010; Bucciferro, 2017; Pereira; 2016; UN, 2013; UNDP, 2014; World Bank, 2017a). The division between 'the non-white' from the poorer Northern regions and 'the white' from the richer South is strongly mirrored in tourism, in that the white Southerners can afford to travel to their preferred destinations in the North and Northeast, whilst non-white Northerners work in tourism to serve the whites (see: Section 4.3.2. Importance of tourism). In this study, participants frequently refer to incidents of racism by domestic tourists, whereas international tourists are described as polite and respectful. This, therefore, strengthens the internal

North-South divide in Brazil. This historical divide is also noted in Weinhold et al.'s (2013) study in which inequality between large soy farmers from the South and local populations in the North is examined.

In host-guest arrangements in tourism, host communities are often portrayed as 'the other' by the narrative of the dominant ideology to justify and normalise social difference (Drew, 2011). Exploring perceptions of Brazilian elites towards the poor, Silva and Lopez (2015) show that the notion of 'the other' (which strongly conflates with the poor) was dominant among Brazilian elites. Through tourism, these narratives might become aggravated and ultimately reproduce inequality (Gallardo & Stein, 2007; Silva & Lopez, 2015). Ruhanen and Whitford (2018:1733) conclude that the *"unequal relationship [between host and guest] works to continue the perpetuity of the marginalisation of Indigenous people that in itself promotes discrimination and racism".* In the particular context of this study, the division between the white and the non-white does not only exist in host-guest encounters in domestic tourism, but also within the local tourism industry, between the *"superior"* white business owners and managers and the *"inferior"* non-white locals employed in these businesses (Keily, 36_I_15_2). This is further discussed in Section 8.3. Political economy in tourism.

As shown in Section 7.3.2.2. Societal benefits and costs, participants from all socio-economic groups strongly emphasise wider benefits and costs for the whole society as a result of tourism development. These wider societal benefits and costs are categorised into: infrastructure, nature and environment, living space, access to goods and services, knowledge and culture, and safety and security. In relation to these categories, participants explain what they value, what constitutes a real opportunity due to tourism development (+) and what does not characterise a real opportunity (-) (see: Table 8-f). For example, in terms of infrastructure, participants indicate that they value access to places, which is equivalent to the real opportunity (i.e. capability) of having easier access to neighbourhoods around Imbassaí (e.g. Barro Branco) and Bahia's capital city Salvador. On the other hand, however, capability expansion is limited since further road infrastructure, for example, to a hospital, which is in Mata de São João, and general infrastructure in terms of electricity and water supply, sewage system is perceived to be inadequate.

Several tourism studies emphasise that local communities strongly value improvement in infrastructure and transport due to tourism development (e.g. Almeida-García et al., 2016; Muganda et al, 2010), which is also found in this study. In terms of nature and environment, participants comment that there is stronger awareness on preservation, particularly through engagement with tourists, in that tourists are perceived to bring an ecological mind-set (e.g. Finn, 6_I_28; Amy, 13_I_19; Audrey, 29_I_7). This supports the positive educational effect due to tourism development identified by Daldeniz and

Opportunities - provided by tourism (+) and not provided by tourism (-)			
Category	*Valued aspect*		*Real opportunity*
Infrastructure	Access to places (through improved road infrastructure)	+	Having easier access to neighbourhoods around Imbassai and Bahia's capital Salvador
	Access to hospital treatment	-	Road infrastructure to Mata de Sao Joao not available
	Sufficient infrastructure (e.g. electricity supply, water supply, sewage system)	-	Infrastructure was not developed in line with destination growth
Nature and environment	Preservation of natural environment	+	Having greater awareness on how to preserve the natural environment due to tourism, particularly, exchange with tourists
	Healthy, natural and clean environment	-	Preservation of environment is at risk due to inadequate infrastructure development for tourism
	"Controlled" environment to avoid natural destruction	-	Preservation of environment is at risk due to uncontrolled and illegal constructions
Living space	Living in Imbassai	-	Life in Imbassai is not affordable for poor- & low-income individuals due to price increases as a result of tourism
Access to goods and services	Diverse products to choose from	+	Having access to diverse products in supermarkets and shops (despite expensive prices)
	Access to services such as health-care, education	+	Having improved access to services such as the health-care centre in Imbassai and a public school
Knowledge and culture	Access to information	+	Having access to information through internet access and exchange with tourists
	Cultural traditions and values of the region	+	Celebrating cultural traditions and values that are typical for the region (e.g. São João)
	Cultural exchange with people from other nations and cultures	+	Communicating with tourists visiting Imbassai and learning about their cultures
Safety and security	Living in a safe and secure environment	-	Drugs abuse, violence and prostitution are perceived to have increased in Imbassai as a result of tourism

+	*Real opportunity (capability) provided by tourism*
-	*Explanation of why not a real opportunity*

Table 8-f: Opportunities - provided and not provided by tourism
Source: Author

Hampton (2013). In contrast to Daldeniz and Hampton's (2013) research, in this study, awareness on environmental issues and preservation is perceived to be a result of a positive demonstration effect of tourist behaviour on locals i.e. locals copy tourists in disposing of waste in a bin (not a consequence of collaborative efforts and awareness initiatives). Bwalya-Umar and Mubanga's (2018) study points out that a cleaner city is linked to efforts of the council rather than to engaging with and learning from the behaviour of tourists. Whilst, in this study, general environmental degradation and deforestation are frequently discussed by participants of all socio-economic groups, both issues receive very little attention from participants in Bwalya-Umar and Mubanga's (2018) study.

The tourism literature has identified the issue of increasing prices as a consequence of tourism development with the consequence that locals cannot afford to buy goods and services (e.g. Bwalya-Umar & Mubanga 2018; Muganda et al., 2010). A key issue identified in this study is that due to increasing prices, particularly driven by second home development, locals are forced to leave their living space to live outside Imbassaí. Nonetheless, although goods and services have become more expensive, locals emphasise that access has significantly improved in comparison to the time before tourism was developed. Better access to services such as health-care and education due to tourism development is supported by tourism studies on residents' views towards tourism development (e.g. Bowden, 2005; Manwa & Manwa, 2014). While access to information through improved telecommunication is pointed out (e.g. Muganda et al., 2010) access to the world through exchange with tourists, which is found to be important for locals in this study, is not something which is given prominence in the literature.

In terms of safety and security, this study identifies increasing violence, drug abuse and prostitution as a consequence of tourism development, in that participants perceive that people from outside, tourists and migrants, bring these negative impacts to Imbassaí. Several studies (e.g. Almeida-García et al., 2016; Bwalya-Umar & Mubanga, 2018; Daldeniz & Hampton, 2013) confirm the perception that tourists bring drugs, alcohol and crime to the destination leaving harmful impacts to local communities.

8.3. Political economy in tourism

This study has aimed to explore the relationship between tourism, poverty and inequality from a political economy perspective using Frank's dependency theory and Giddens' understanding of power (conceptualised in his structuration theory). Firstly, Frank's dependency theory is applied to discuss dependency relationships within and between different spatial scales. Thereupon, Giddens' structuration theory is utilised to investigate power in social relationships within and between different spatial scales.

8.3.1. Dependency relationships in tourism

Political economy is concerned *"with the interaction of political and economic processes in a society: the distribution of power and wealth between different groups and individuals, and the processes that create, sustain and transform these relationships over time"* (Collinson, 2003:10). Tourism research has foremost adopted a radical viewpoint based on Frank's (1969) dependency theory arguing that capitalism favours development of the core since the core has the power over economic and political resources (capital, investment and influence), whilst the periphery is left behind. Dependency theory has predominantly been concerned with core-periphery relationships at an international scale (Herath, 2008; Mosedale, 2011); however, Frank (1969) argues that these unequal relations extend further to national, regional and local levels. To achieve the aim, this study has analysed dependency relationships within the local level and between different spatial scales i.e. local and municipal, and local and state.

At the local level

With one large-scale luxurious all-inclusive hotel and resort, one hotel and many pousadas (see: Chapter 6. Results - Part 1), tourism in Imbassaí is characterised by both large-scale and small-scale tourism development attracting predominantly domestic, but also international travellers. Accordingly, large-scale and small-scale tourism development co-exist in Imbassaí with a high dependency on the domestic market[54], which is also identified by Pegas et al. (2015) focusing on sustainability of coastal tourism in Brazil's Northeast. The co-existence of both types particularly contrasts with dependency theory, which suggests that one single development pattern of large-scale tourism attracting international tourists is dominant in destinations (Chaperon & Bramwell, 2013).

The group of higher-income participants living in Imbassaí are mainly business owners and managers from a white background (i.e. white Brazilians, white Europeans and other white) who moved to Imbassaí and are viewed by other participants as foreigners. In contrast, poor-income and low-income participants are described as locals being from a non-white background (Preto and Pardo) from the Northeast. Poor-income participants mainly work as micro-entrepreneurs and low-income participants are employed in 'minimum salary positions' as cleaners, waiters and cooks in tourism businesses. Poor-income participants view higher-income participants as superior due

[54] Note: during data collection the percentage of domestic tourists was likely to be lower than usual (see: Section 6.2.2. Tourism demand: characteristics of tourists)

to their economic power, which extends to political power as participants argue that *"Who has money, can order"* (Keily, 36_I_15_2) and *"they have more influence. I have no influence at all. I am small and they are big. I do not have any power to give orders"* (Rachel, 5_I_15). It is indicated by participants that higher-income participants have connections to officials at the municipal government, which strengthens their political influence. Due to their economic and political power, higher-income participants are considered to have the influence to prevent poor-income participants from doing business and generating income (e.g. Rachel, 5_I_15; Bridget, 12_I_29; Keily, 36_I_15_2). Thus, poor-income participants feel dependent on the goodwill of higher-income participants.

The division between non-white locals working in inferior positions and white foreigners being business owners and managers in tourism in Imbassaí largely reflects exiting structural inequalities in the tourism industry in developing countries, in which white foreigners own tourism businesses and non-white locals need to accept foreign dependency in order to generate income (e.g. Akama & Kieti, 2007; Jaenis, 2014; Lapeyre, 2011; Mbaiwa, 2017). Dependency theory argues further that locals are forced to accept the (often) exploitative work conditions in tourism businesses since they do not have other employment opportunities (e.g. Bianchi, 2011; Mbaiwa, 2017). This is also emphasised in this study in arguing that local people *"do not have another option. This is what they can get. This is the job, they can get. That's it. There is no alternative"* (Dawn, 31_I_18). Working conditions in a small-scale tourism business are described by participants as better than in a large-scale environment, in that they feel treated with greater respect by superiors. Furthermore, it is found that salaries for employees, adherence to laws and regulations of working conditions and investment in capacity-building and development opportunities are similar in small-scale and large-scale businesses, which contrasts with Scheyvens and Russel's (2012) study (as discussed in Section 8.2. Poverty and inequality in a tourism context).

Between the local and the Prefeitura at the municipal level

Although the development of tourism in Imbassaí started earlier than in other destinations in the region (see: 7.2.1.The tourism development story), participants share the perception that tourism in Imbassaí today lags behind, particularly, in contrast to Praia do Forte (a tourist destination in the municipality). A lack of interest and initiative by the Prefeitura in supporting tourism development in Imbassaí is frequently reported by both low-income and higher-income participants as key reasons (e.g. Finn, 6_I_28; Amy, 13_I_19; Theo, 14_I_4; Oscar, 15_I_3; Tony, 17_I_1; Luke, 19_I_21; Otto, 21_I_27; Adam, 22_I_2). With the Prefeitura being situated in Mata de São João, Mata de São João has the administrative authority over the municipality (also called Mata de São João) and acts as the 'municipal core' for tourism development in Imbassaí (representing the 'periphery'). This contrasts with Lacher and

Nepal's (2010) study, in that the core of Mata de São João does not receive any tourists, and thus does itself not exert control via directing or not-directing tourist flows to villages; however, in both cases, the cores have *"substantial influence on their [=villages] development, and can largely dictate how the village will develop as a destination through their interest, or lack thereof"* (Lacher & Nepal, 2010:963). Similarly, in both cases, lack of capital is frequently mentioned as a factor that hampers further tourism development.

Participants feel that the city of Mata de São João benefits much more from tourism development than Imbassaí, although the revenue is generated in Imbassaí (e.g. Amy, 13_I_19; Theo, 14_I_4; Tony, 17_I_1). There is a strong perception among participants that tourism taxes are not redistributed fairly, but are used to advance infrastructure in Mata de São João (e.g. Amy, 13_I_19; Theo, 14_I_4; Tony, 17_I_1; Ryan, 23_I_5; Richard, 33_I_25). Similarly, Chaperon and Bramwell's (2013:142) study highlights participants' perceptions that the 'more peripheral' island of Gozo *"received an unfairly small allocation of resources"* in contrast to its neighbouring 'economic and political core' Malta. The reason for the unfair distribution of resources is considered to be related to the political power being highly concentrated on Malta with the consequence that tourism in Gozo is dependent on political decisions made externally (ibid). This, particularly, reflects the situation of tourism in Imbassaí in being dependent on political decisions made in Mata de São João. In contrast, however, Mata de São João only has political dominance (over Imbassaí), whilst the city is economically insignificant (e.g. Theo, 14_I_4).

Praia do Forte is perceived as the 'neighbouring economic core' to 'peripheral' Imbassaí resulting in Praia do Forte receiving priority and more funding from the municipal Prefeitura in Mata de São João (e.g. Ryan, 23_I_5; Matthew, 30_I_8). Thus, in common with Gozo (Chaperon & Bramwell, 2013), Imbassaí is faced with structural constraints in being economically less strong and less known as a tourist destination than Praia do Forte. Accordingly, Praia do Forte has the power over resources (economic, destination image) which benefits Praia do Forte more in receiving greater funding. The funding can be further used to enhance development and strengthen the status of Praia do Forte, while Imbassai lags behind in terms of tourism development.

Additionally, participants argue that Praia do Forte does not only receive greater funding due to its' economic dominance, but also due to municipal politicians pursuing personal interests since they themselves own property and are connected to influential people who own property in Praia do Forte. Thus, by directing investment towards Praia do Forte, they gain greater personal benefits than by enhancing tourism development in Imbassaí. Similarly, the strategy of second home development (instead of tourism development) in Imbassaí as pursued by the Prefeitura is perceived to contribute to personal interests of politicians. Participants (e.g. Tony, 17_1_1) report that municipal politicians are connected to actors of real estate companies and by supporting real estate development, they receive monetary benefits. What reinforces this perception is that condominiums are being built in protected areas, without the Prefeitura intervening (e.g. Richard, 33_I_25). In that regard, Lacher and Nepal (2010:963,964) confirm that *"peripheral regions in general in most developing countries have had to deal with […] political manipulation from central and regional governments"*. Participants feel that they have a lack of power to influence decision-making and limit second home development, which reflects the political dependence on Mata de São João.

Between the local and the state level

The political core in Salvador for the state of Bahia is perceived to have no interest in tourism, which hampers tourism development in Bahia, extends to the municipality of Mata de São João and, ultimately, affects Imbassaí according to higher-income participants (e.g. Amy, 13_I_19; Theo, 14_I_4; Tony, 17_I_1; Henry, 24_I_23; Matthew, 30_I_8). They recognise a change in interest of the Bahian government in tourism which they relate to a change of the political party being in power, and the philosophy of the party (e.g. Tony, 17_I_1; Matthew, 30_I_8). This recognition is supported by the fact that institutions that promoted and advanced tourism development in the state (e.g. BAHIATURSA) do not exist any longer in their original form with the consequence that tourism has become very weak[55] (e.g. Ryan, 23_I_8; Henry, 24_I_23; Richard, 33_I_25). Despite the shortcoming of the Bahian state government in supporting tourism development through implementing policies and plans and providing investment, the government still receives benefits from tourism through tax revenues from the various tourist destinations in Bahia. These benefits do not seem to be re-invested to enhance the marketing and infrastructure for tourism in Bahia, which affects Bahian tourist destinations including Imbassaí (e.g. Theo, 14_I_4; Ryan, 23_I_8; Henry, 24_I_23).

In case of Imbassaí, despite existing dependencies and barriers for tourism development, development has occurred and is further encouraged mainly by private initiatives (e.g. Tony, 17_I_1). This contrasts with the dependency theory argument that interaction between core and periphery prevent development in the periphery

[55] At the time of the study, Brazil was faced with a political and economic crisis (see: 4.2. Brazil - the wider political economy context), which might be linked to the government's disinterest in tourism development since other issues had priority. Nonetheless, participants indicate that the lack of interest of the Bahian government has been on-going for almost 15 years.

(Frank, 1969). Similarly, Chaperon and Bramwell (2013) and Lacher and Nepal (2013) find that development takes place due to actors in the periphery exercising agency and advancing tourism development. Thus, both studies (ibid) indicate that peripheries are not the simple 'victims of the core' as suggested by dependency theory.

In the next section the relationships among actors within the local level and between the local level and wider (municipal, state) spatial scales are analysed in more depth using Giddens' structuration theory to investigate power in the form of agents' transformative capacity alongside structural domination.

8.3.2. Power relations in tourism

Structuration theory proposes that agency and structure are in a social relationship, which evolves over time and space since repetitive actions of agency reproduce structure, which, in turn influences agency in a way that it enables or restricts their activities (Giddens, 1979). Thus, structure is considered as both the medium and outcome of human interactions that constitute social systems, which is mirrored in Giddens' (1979) concept of the duality of structure. Since structure only exists virtually in agents' knowledgeability and actions, developing understanding of the duality of structure requires an evaluation of agents' knowledgeability of actions and interactions (Giddens, 1984). 'Knowledgeability' refers to the 'tacit knowledge' actors have acquired and draw upon in interactions - thus, reproducing structure in a social system over time and space (Giddens, 1982 & 1984).

Before investigating power in agents' actions and interactions (Giddens, 1979) within and between different spatial scales (Frank, 1969), actions and interactions discussed by participants (see: Chapter 7. Results - Part 2) are evaluated by drawing linkages to Giddens' notions of space.

8.3.2.1. Agents' actions and interactions 'in space'

Agents' actions and interactions are defined by the sphere of interactions, meaning that poor-income and low-income participants predominantly act and interact with actors at the local level, whereas the sphere of higher-income participants seems to be extended to the municipal and state levels. Participants predominantly refer to direct interactions they are involved in. For example, since low-income participants directly interact with others at the local level, they mainly report on these interactions. Frei (2013:58) explains that direct interactions pre-suppose *"a shared life-world and co-presence"*. Calhoun (1991:100) adds that direct interactions are *"emotionally central to people in most advanced modern societies and at the heart of most people' evaluative framework"* - which provides reasoning as to why participants predominantly report on these direct interactions. This links to Giddens' (1993:67-68) notion of 'co-presence'

- representing a place *"close enough"* to perceive others and be perceived by others. The notion of co-presence extends further, in that participants comment on their perceptions on actions of actors at a wider spatial scale, although they do not directly interact with these actors. For example, low-income participants seem to feel close enough to describe their perceptions on how the Prefeitura acts to influence tourism development and how such actions indirectly affect them, although they do not directly interact with the Prefeitura at the municipal level.

These indirect interactions, where a human being is influenced without having a direct or immediate input, are commonly perceived by participants as a lack of (inter-) actions taking place. However, it needs to be acknowledged that a perceived lack of (inter-) actions of and among actors does not necessarily mean that these (inter-) actions do not take place; it might just mean that actors are not aware of (inter-) actions, since they are not directly involved in them. A perceived lack of (inter-) actions is frequently interpreted by participants as a lack of interest in tourism development, in that, for example, low-income participants consider that the Prefeitura has no interest in tourism development which seems to be based on a perceived lack of actions taking place. Similarly, higher-income participants refer to interactions they are involved in at the local and the municipal level, and comment on a perceived lack of actions of the Bahian government, which is interpreted by higher-income participants as a lack of interest of the Bahian government in pursuing a strategy of tourism development.

8.3.2.2. Investigating power in interactions

Giddens views social systems as the *"empirically observable, intertwining, and relatively bounded social practices that link persons across time and space"* (Sewell, 1992:4-5). Integral to these social practices/interactions is power *"in a dual sense: as involved institutionally in process of interaction, and as used to accomplish outcomes in strategic conduct"* (1979:88). Accordingly, Giddens (1979:91) views power as both, *"domination"* and *"transformative capacity"*.

Interactions involve three dimensions, namely communication, power and sanctions which are linked through modalities of interpretive schemes, facility and norm with their corresponding dimensions of structure, namely signification, domination and legitimation (Giddens, 1979) (see: Figure 8-1). Giddens (ibid) clarifies that these dimensions are not separate entities, but they are inextricably connected and occur in all social interactions (see also: Sections 2.4.2. Giddens' structuration theory and 3.3. Conceptual framework). These dimensions are used to investigate power as transformative capacity and structural domination in direct and indirect interactions between actors within and between different spatial scales to explore the duality of structure i.e. how structures evolve and agents respond to these evolving structures.

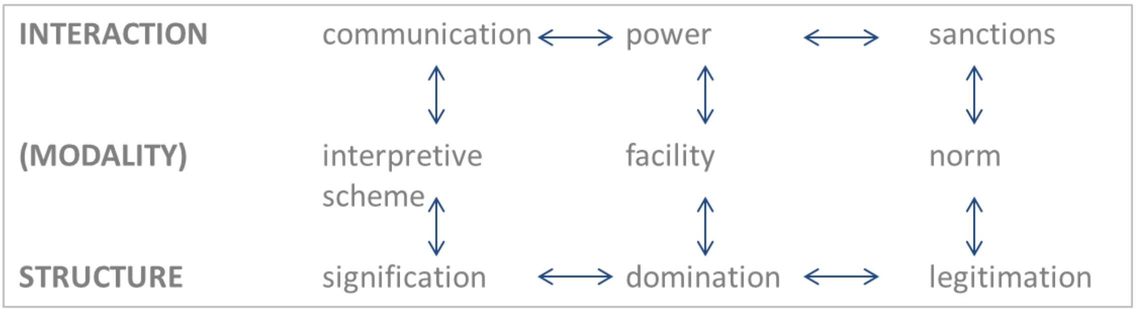

Figure 8-1: Dimensions of agency
Source: Author, Adapted from Giddens (1979:82)

8.3.2.2.1. Power in direct interactions

Perspectives of poor-income participants

Direct interactions between poor-income participants, higher-income individuals and the Prefeitura

Communication using interpretive schemes forms an integral part of all social interactions (Giddens, 1979). In other words, communication among agents requires a common interpretive scheme. Poor-income participants (mainly non-white micro-entrepreneurs) and higher-income participants (mainly white tourism business owners and managers) share a common language (i.e. Portuguese) as the main interpretive scheme. Interactions between these two groups are, however, strongly influenced by their racial backgrounds. According to Macionis (2010), race is a human category by which society is structured into groups based on characteristics e.g. skin colour, shape, that are considered important by their members. Macionis (2010) clarifies what he means, by arguing that people have different characteristics, but those do not classify race - what classifies race is the decision made by people that those characteristics carry importance. This is supported by Smithsimon (2018:online) stating *"we can see race, but it's not real"*. Skidmore (1999:2) points out that

> *"historically the Brazilian elite has been able to hold to a belief in white superiority and at the same time deny the existence of a racial problem by adopting an "assimilationist" ideology. [It] continues up to the present day with the widely held view that disproportionate Afro-Brazilian poverty is a legacy of socioeconomic disadvantage and not a result of discrimination".*

Similarly, Cao (2017:493) argues that *"the view that race does not matter in Brazil continues to be popular amongst Brazilians, despite the fact that studies on poverty,* *social mobility, access to health, housing, education and employment reveal the pervasive nature of racial inequality"* and concludes that *"racial democracy emerges as a myth rather than a social reality"*.

In Giddens' framework: the Brazilian elite has used its 'white superiority' as a facility by drawing on the resource 'of being white' to exert power over non-white Brazilians. The ideology of white superiority has become legitimised over time and until today it appears to be accepted as the norm in the Brazilian context, which places sanctions on poor-income participants in exerting agency. To exert agency (using transformative capacity), poor-income participants seem to feel that they lack the facility i.e. the resource of being white. This links with Lukes' (1974, 2005) third form of latent power meaning that power is exercised based on an ideological belief i.e. white superiority.

By poor-income participants frequently referring to racial divisions and connecting the 'white race' to superiority and the 'non-white race' to inferiority, they seem to have internalised the paradigm of white superiority that has emerged as structural signification through which domination is exerted and agency is restricted. In addition to racial appearance, type of clothes seems to act as a facility to exert domination, in that poor-income participants perceive belonging to the native non-white population and wearing Bahian clothes as being inferior to white tourism business owners having a more international style and outlook. Due to this 'self-signified' inferiority, poor-income participants 'give' structural domination to the white higher-income class and limit their own agency. This provides indications for Giddens' (1979) notion of the conflation of structure and agency, in that exertion of human agency is constituted by structural constraints. It represents the duality of structure, in that, on the one hand, the white race can be viewed as a medium by which people are perceived to exert power, and on the other hand, the superiority or domination of the white race can be considered an outcome reconstituted through agents' actions (Giddens, 1979). This particularly supports Smithsimon's (2018) statement that racial divisions remain real through people assigning importance to them.

Poor-income participants perceive that issues between them and higher-income participants are not addressed in direct interactions between both groups, but via the Prefeitura. They (e.g. Rachel, 5_I_15; Bridget, 12_I_29; Keily, 36_I_15_2) feel that pousadeiros (higher-income individuals) pass their issues to influential people at the Prefeitura using unofficial ways of private networks and connections. The Prefeitura then brings rules into force favouring the business interests of pousadeiros. In other words, higher-income individuals are perceived to draw on the resource of a hidden network with officials from the Prefeitura that represents a facility to exert structural domination over poor-income agents. This relates to Lukes' (1974, 2005) second form of covert power - when power is exerted and maintained by excluding issues from certain actors, which is done by de-framing an issue and/or putting dominant rules and procedures in place.

This also portrays how actions of one group impose potential sanctions on others (Giddens, 1979). In this case, by introducing new rules, the Prefeitura poses sanctions on poor-income individuals in generating income. These new rules are, firstly, that poor-income participants are not allowed to sell products at a certain place and time in Imbassaí, and secondly, that busses cannot enter the city centre with the consequence that the clientele of potential customers for individual sellers (poor-income participants) decreases. The latter is perceived to be enforced by the Prefeitura under the 'frame' that busses destroy the streets; whilst poor-income participants believe that the pousadeiros and the Prefeitura want to transform tourism in Imbassaí to elite-tourism. By enacting a rule, it becomes legitimised and represents structural constraints (i.e. power in the form of structural domination) to poor-income individuals. This aligns with other tourism studies (e.g. Bwalya-Umar & Mubanga, 2018; Islam & Carlsen, 2016 Knight & Cottrell, 2016; Reed, 1997) that show that local elites (e.g. large tourism businesses and public institutions) have the power to prevent other groups of the society from participating and generating benefits from tourism development. Similar to Islam and Carlsen (2016), this study shows that local people lack the resources to exert power; however, the type of resources differs in both studies. Whilst in this study networks and connections are identified as key resources, Islam and Carlsen (2016) classify (tourism) knowledge and market access as key challenges for communities to participate and benefit from tourism. However, what strikes out in both studies, is that, the less wealthy or the relatively poorer people of society are the ones who lack the resources to participate and influence decision-making.

Perspectives of low-income participants

Direct interactions between low-income participants and higher-income individuals (employee-employer relations)

Low-income participants share the main characteristics with poor-income participants: origin and racial background, which distinguish them from the group of foreign white higher-income individuals. Similar to poor-income individuals, low-income participants frequently refer to the white race as superior, meaning that they perceive themselves lacking the facility of drawing on the resource of being white. Since they lack this facility, they perceive their agency to be restricted. This supports the notion of the duality of structure, in that race is established as a medium to exert structural domination, and racial domination becomes reconstituted through people's actions i.e. by low-income participants in referring to white superiority frequently and accepting this as the norm.

In contrast to poor-income participants, low-income participants are mainly employees (waiters, cooks and cleaners) in tourism businesses owned or managed by white businessmen and are in direct working relationships that legitimise the structural domination from one group (employers) over the other (employees) in the workplace. In this working relationship, interactions are based on norms that are mainly defined by employers (e.g. how to communicate, how many hours to work, what to wear). These norms place sanctions on employees, whereas employees have limited agency in changing these. Accordingly, in the employee-employer relationship, there are natural power dynamics between the superior owner/ manager and inferior employee in place. In this study, however, these natural power dynamics seem to go beyond the employee-employer relationship since the feeling of inferiority is also linked to origin and racial background (e.g. Luke, 19_I_21; Leo, 18_I_22). This becomes particularly evident when these groups meet - for example, at private parties of employers, where the non-white employees serve the white businessmen in Imbassaí (e.g. Leo, 18_I_22). These parties seem to facilitate and strengthen the feeling of structural domination by white higher-income individuals. The example links with comments made by Brazilians in the World Bank study 'Voices of the poor' as, for example, one participant stated *"The poor person has to exist so he can serve the great one, the rich"* (Brazil, 1995 in: Narayan, 1999:31).

While low-income individuals express structural constraints working in both, small- and large-scale tourism businesses, they also perceive power of their employers in the form of transformative capacity in a small-scale environment. Low-income participants (e.g. Luke, 19_I_21; Leo, 18_I_22) indicate that their employers (small-scale business owners/ pousadeiros) use their financial resources as a facility to provide support to employees in difficult situations (e.g. illness of a family member who needs hospital treatment). Furthermore, employers are considered as family, which sets the employee-employer relationship at a more personal level (e.g. Luke, 19_I_21). Thus, in contrast to exploitative working conditions in foreign-owned tourism businesses as frequently implied by other studies that take a dependency theory perspective, this study shows that power is also used to support people in sustaining and transforming their livelihoods.

In a large-scale environment, employees mainly perceive that the domination of structures limits their capability building. This perception seems to be intensified since supportive structures for capacity building (e.g. training for professional development) are not in place. This low interest among employers in capacity building of low-income individuals aligns with Liu's and Wall's (2006) finding. They (Liu & Wall, 2006:169) argue that low interest in human resource development might *"perpetuate and aggravate a culture of subservience"*. In this study, a culture of subservience is evident, particularly intensified by racial divisions, which largely reflects dependency patterns in developing countries.

Direct interactions between low-income participants and domestic tourists (service-staff and tourist encounters)

In common with the way in which low-income employees' and employers' social interactions are defined by norms in their work relationship, interactions between service-staff and tourists are characterised by norms and conventions (De Kadt, 1979; Edensor, 2001; Pearce, 1981). Saarinen and Manwa (2008:45) explain that:

> *"host-guest encounters in tourism are often characterised as unequal situations dictated by the tourists' and industry's needs rather than the needs and values of the hosting locals and communities. The difference and potential competition between the needs of the tourism industry and local interests is a question of power relations".*

In other words, in host-guest relationships natural power dynamics between 'the servants' and 'the served' are in place. In this study, the host (non-white service-staff) serve the guests (white domestic tourists) - thus, placing the host in an inferior position, whilst the guest takes a dominant role. In this study, social interactions between service-staff and domestic tourists seem to go beyond natural power dynamics in host-guest relationships since low-income participants frequently refer to incidents, when domestic tourists show disrespectful and racist behaviour towards service-staff. Edensor (2001:71) explains that *"when tourists enter particular stages, they are usually informed by pre-existing discursive, practical, embodied norms which help to guide their performative orientations"*. In this study, domestic tourists are informed by the discourse of white superiority which has become an 'embodied norm' by which they seem to legitimise their behaviour.

Although low-income participants seem to have internalised the ideology of white superiority and seem to accept this in employee-employer relationships (as discussed earlier), they view the superiority of white domestic tourists as racist and disrespectful. Therefore, it appears that white superiority is perceived differently in different contexts: whereas white superiority is accepted as a norm in the employee-employer relationship, it is indicated that it is not accepted as a norm that underpins host-guest relationships. Nonetheless, despite their disapproval of the behaviour of domestic tourists, participants' agency is restricted since exerting agency and responding to the treatment of domestic tourists might endanger their job security and consequently their income generation. This provides indication that particularly through domestic tourism the common narrative of white superiority becomes aggravated and reproduces existing inequalities between the non-white North and the white South (e.g. Gallardo & Stein, 2007; Pegas et al., 2015).

Perspectives of higher-income participants

Direct interactions between higher-income participants and poor-income and low-income participants (between foreign tourism business owners and locals)

Low-income and poor-income participants share the same characteristics that distinguish them from the group of higher-income individuals. As a consequence, participants (from all groups) refer to two opposing groups in Imbassaí: the non-white locals versus the white foreigners. Non-white locals (poor-income and low-income) draw attention to a feeling of inferiority towards white businessmen (higher-income) - creating a perception of structural white superiority (as previously discussed). This perception of poor-income and low-income participants is also mirrored in the perceptions of higher-income participants. Firstly, a participant (Amy, 13_I_19), who perceives herself as an outsider, observes the superiority of white business-owners in their commanding language towards their employees, which she deems as unacceptable in an employee-employer relationship. Secondly, the feeling of superiority among higher-income participants becomes evident in their narratives that describe locals as simple-minded, lazy and un-reliable (e.g. Cody, 1_I_14; Theo, 14_I_4) - thus, constructing them as inferior. Furthermore, locals seem to act surprised when they are treated equally (e.g. Amy, 13_I_19), which strengthens the previous argument that they seem to have internalised white superiority. By accepting the superiority of white employers as legitimised, their superiority becomes a norm that places sanctions in the form of mental barriers to non-white locals in exerting agency. It appears that in the view of locals they lack the facility, money and racial background to dominate the narrative and to transform themselves and their circumstances.

Direct interactions between locals (all socio-economic groups) and the Prefeitura

The Prefeitura as the institutionalised structure exerts domination based on legitimation, in that politicians have been elected by the public i.e. through elections politicians, their actions become legitimised, which links to Lukes' (1974, 2005) first form of overt power. These actions are (supposed to be) bound by norms and place sanctions on one group of people, but might not place sanctions on another. Participants (e.g. Cody, 1_I_14; Theo, 14_I_4; Tony, 17_I_1; Luke, 19_I_21; Otto, 21_I_27; Matthew, 30_I_8; Richard, 33_I_25) explain that the Prefeitura did not act to prevent the large-scale hotel and resort from discharging sewage water into the river - thus, not placing sanctions on the large-hotel and resort. In consequence, locals could not use the water of the river any longer (as they used to do), which placed sanctions on their daily routines.

Participants associate this lack of action from the Prefeitura with political corruption (e.g. Tony, 14_I_4). There is the strong perception that 'the Prefeitura and corruption go hand-in-hand' - thus, indicating a hidden network between officials from the Prefeitura and other influential people (e.g. Amy, 13_I_19; Tony, 17_I_1; Henry, 24_I_23; Richard, 33_I_25), which has been discussed in the previous sub-section. It particularly relates to Islam and Carlsen's (2016:651) that *"politically motivated people are dominating the decision-making"*, and thus, they can prevent other groups of society from participating in and from generating benefits from tourism development. Accordingly, politicians use their power in the form of structural domination signified by their position in pursuing their own goals. In other words, through their positions, their decisions are legitimised; however, they are perceived to misuse their position by deciding issues on the political backstage, where others are excluded and cannot influence decision-making - which links to Lukes' (1974, 2005) second form of covert power.

Nonetheless, by locals establishing an environmental group, they 'combine powers' to exert agency in their interactions with the Prefeitura. By publishing this issue on social media and raising awareness, locals make use of their power to influence these sanctions placed on their lives by the Prefeitura - thus, showing political agency to influence decision-making at the municipal level. Giddens' (1979) words: agents [=locals] used their transformative capacity to intervene in an event [=discharge of sewage water into the river] to produce a definite outcome [=that sewage water is not discharged in the river any longer]. To do so, they drew on the resources [=social media] to raise awareness and put pressure on the Prefeitura. As a consequence, the Prefeitura had to act to stop that the large-scale hotel and resort discharging sewage water into the river and in turn, placed sanctions on the hotel and resort. The political agency of the environmental group extends further, in that it has been achieved that EMBASA, the water company of the Bahian state, now needs to control the quality of the water regularly.

Social media can be considered as the facility to exert the transformative capacity of agents, whilst at the same time, by agents employing social media in interactions to achieve their goals, it becomes reconstituted as a structural element. Further incidents when locals use social media to raise awareness on issues and put pressure on the Prefeitura (e.g. illegal construction resulting in environmental destruction, misuse of taxes) are also reported by participants. This provides evidence for Jamal and Dredge's (2015:184) claim that locals *"do not sit around passively under the control of external stakeholders"*, but actively use their political agency. Similarly, Erskine and Meyer's (2012) study indicates that knowledge combined with access to a key resource has enabled some form of empowerment of locals within existing structures.

Direct interactions between the Commercial Association (mainly representing higher-income participants) and the Prefeitura

The Commercial Association represents the interests of business owners in Imbassaí in order to influence tourism policy and planning at the municipal level, which shows the political agency of tourism actors in in Imbassaí. It appears that by institutionalising business interests in a Commercial Association, these interests become more legitimised and more powerful to influence decision-making in favour of businessmen in Imbassaí. In other words, a structure, the Commercial Association, is established to be more dominant in tourism policy and planning at the municipal level. The Association serves as a facility drawing on resources, which are *"the media where transformative capacity is employed"* and at the same time *"structural elements of social systems as systems, reconstituted through their utilisation in social interaction"* (Giddens, 1979:92). This reflects the duality of structure, in that the Commercial Association is employed by agents (individual business owners) as a medium to exert power, and on the other hand, the Commercial Association represents a structural element that has been constituted by agents. This structural element places potential sanctions on individual business owners who are part of the Association, in that they need to comply with decisions made by the majority - even if they do not agree with it. In common with Chaperon and Bramwell's (2013) study, actors in Imbassaí seem to exert power and influence over their tourism industry within structural constraints.

Social interactions within the Commercial Association are formed by Brazilian-members who share a common understanding on how tourism should be developed and on how to communicate with the Prefeitura to achieve this. On the other hand, non-Brazilian businessmen in Imbassaí do not participate in activities of the Commercial Association since they have different views on how to advance tourism development. Thus, it can be argued that Brazilians and non-Brazilians do not share a common understanding (or in Giddens' words: an interpretive scheme), so that communication and social interactions between these two groups in the Commercial Association do not take place. Since the Commercial Association only represents the common understanding of Brazilian business owners, it is perceived not to have achieved its full potential in exerting power to influence municipal decision-making. If both groups (Brazilians and non-Brazilians) were to share a common understanding on how to develop tourism, it would signify a greater togetherness and cohesion among businessmen in Imbassaí, which is considered by participants to enable the Commercial Association to increase its influence.

In order to have greater political agency and influence municipal decision-making, the Commercial Association seeks to use the large-scale hotel and resort as a facility (e.g. Dana, 3_I_10; Matthew, 30_I_8) to exert agency. Thus, participants acknowledge the large-scale hotel and resort as a valuable resource. Some participants (e.g. Amy, 13_I_19; (Matthew, 30_I_8) particularly emphasise the importance of the large-scale hotel and resort in terms of marketing by 'putting Imbassai on the tourist map' and in terms of infrastructure development for Imbassai. Participants strongly believe that without the support of the large-scale hotel and resort, improvements in infrastructure would not take place. On the other hand, however, there is doubt among participants as to whether and to what extent the large-scale hotel and resort can be used in pursuing the objectives of the Association since the large-scale hotel and resort has its own interests (e.g. Anna, 16_I_11).

8.3.2.2.2. Power in indirect interactions

In indirect interactions human beings do not have a direct or immediate input; however, they are influenced by these (inter-) actions. In this study, participants refer to two types of indirect (inter-) actions they are not directly involved in, but influenced by: a perceived lack of (inter-) actions and hidden interactions.

Power in perceived lack of (inter-) actions

A perceived lack of (inter-) actions of the Bahian government and the Prefeitura is interpreted by participants as a lack of their interests in tourism development at the state and municipal levels. Nonetheless, although (inter-) actions are perceived to not take place, participants still perceive power to be exerted since the lack of actions by the Bahian government and by the Prefeitura negatively influences tourism development in the state of Bahia, and particularly, in Imbassaí. In that regard, 'not (inter-) acting' is interpreted by participants as 'an action in itself' through which power is exerted. Referring to Giddens' dimensions, the action of 'not (inter-) acting' is perceived by participants as lack of communication and is interpreted as a lack of interest that signifies power in the form of domination. In that way, not interacting (and not communicating) becomes a facility in itself, which is used by one group to exert domination over the other.

Power in hidden interactions

Hidden interactions that influence tourism development and people's livelihoods are commonly referred to by participants. This supports the notion of integrating Lukes' (1974, 2005) forms of power in being 'overt', 'covert' and 'latent' into the analysis.

Poor-income participants refer to a hidden network between pousadeiros (higher-income individuals) and the Prefeitura, which places barriers to running their (poor-income participants) businesses and generating income. Higher-income participants consider hidden networks between officials of the Prefeitura and other actors who aim at pursuing personal interest at the expense of people's livelihoods and tourism development. Similarly to not interacting, 'acting covertly' becomes a facility in itself by which one party or group exert domination over the other, whilst not allowing for a direct reaction and transformative capacity of the other group.

Giddens (1979:86) puts forward that *"the reactions of each party to a process of interaction depend upon the contingent responses of the other"* - however, since the actions of one party are not visible, the other party or parties cannot directly respond to the action, which takes their agency in exerting power away. For Giddens (1979:92) power

> *"intervenes conceptually between the broader notions of transformative capacity on the one side, and of domination on the other: power is a relational concept, but only operates as such through the utilisation of transformative capacity as generated by structures of domination".*

However, in this study, power exerted through hidden interactions only appears to represent power as structures of domination as it does not generate transformative capacity.

8.4. Conclusion

This chapter discussed the study's results in the context of the relevant literature. At first, poverty and inequality in a tourism context was explored by using Sen's capability approach to analyse capabilities, real opportunities, provided by tourism, and to evaluate how tourism contributes to achieving these from the perspectives of different socio-economic groups. To do so, capabilities were conceptualised using income, consumption and further valuable opportunities provided by tourism (see: Chapter 3. Conceptual thinking). It was shown that tourism-related income is of critical importance for poor-income and low-income individuals, whilst higher-income participants are able to draw upon other financial resources or sources of income (than tourism income) to sustain their livelihoods and maintain their lifestyles. Accordingly, it is unclear as to what extent they use income from tourism to provide education for their children, travel abroad and finance a second home. Both poor-income and low-income individuals use tourism-related income to achieve their basic functionings. Once these are achieved, poor-income individuals focus on work-related functionings, whilst low-income individuals put emphasis on leisure-related functionings. Further valuable opportunities encompass individual opportunities and challenges and wider societal costs and benefits.

Thereupon, the political economy context was analysed using Frank's dependency theory and Giddens' structuration theory. Dependency relationships at the local level, between the local level and wider levels (municipal, state) were identified and discussed. At the local level, the classic dependency structure of white foreigners and non-white locals is analysed and Imbassaí's political and economic dependency on the municipal city of Mata de São João and the neighbouring city of Praia do Forte is shown. Despite the dependency, it is found that development takes place predominantly due to private initiatives - thus, indicating agency.

Using Giddens' structuration theory, power in the form of agents' transformative capacity alongside power in the form of structural domination was investigated to explore the duality of structure. It emerged that agents' interactions depends on their sphere of interactions i.e. on the extent of interactions individuals experience within and between different spatial scales (local, municipal, state). In direct social interactions, agency of participants becomes evident - thus, suggesting that actors exert some degree of power over the local tourism industry. At the same time, however, their agency is restricted due to emerging structures that are identified to be both the medium for and the outcome of people's agency, representing Giddens' duality of structure. In that regard, the ideology of white superiority serves as a medium to exert structural domination and is an outcome that becomes reconstituted through agents' actions.

Additionally, participants are influenced by indirect social interactions, although they are not directly involved in these. Participants frequently refer to a (perceived) lack of interactions and hidden interactions that are considered to influence tourism negatively, and particularly, place barriers on people in generating income from tourism. In that regard, not acting becomes a facility, an act in itself, by which structural domination is exerted. Similarly, hidden interactions can be viewed as a facility that does not allow a direct response or power in the form of transformative capacity. Since power takes place overtly through legitimisation, latently in the ideological belief of white superiority and covertly in hidden networks, the analysis indicates that linking Giddens' conceptualisation of power to Lukes' (1974, 2005) forms of power can be of value.

The next chapter provides a conclusion to the study by reviewing the aim and objectives, reviewing the study's conceptual framework, showing how this study contributes to knowledge, drawing attention to the study's limitations and the need for future research, and providing critical reflections.

9. Conclusion

9.1. Introduction

This final chapter provides a conclusion to the study by reviewing the aim and objectives in relation to the key results and wider literature, reviewing the study's conceptual framework and highlighting the study's contribution to knowledge. This is followed by identifying the study's limitations and providing suggestions for conducting future research.

9.2. Review of aim and objectives in context of the study's key results

The aim has been to explore the relationship between tourism, poverty and inequality from a political economy perspective. The study was conducted in Imbasssaí - a coastal tourist destination in the municipality of Mata de São João in the state of Bahia in the Northeast of Brazil. Brazil's Northeast is characterised by high levels of poverty and inequality, particularly between races - in combination with rapid (domestic) tourism growth as a result of a large-scale tourism-related investment programme since the 1990s. To achieve the study's aim, four interconnected objectives were developed. In the following, these are presented and reviewed in context of the study's key results and literature.

(1) To measure tourism-related revenue flows and income and to determine different socio-economic groups at a local level using quantitative value chain analysis (VCA)

Quantitative value chain analysis (VCA) based on the standard framework and developed under the guidance of the International Trade Centre (ITC) (see: Ashley et al., 2009) was carried out in Part 1 of this study to measure tourism-related revenue flows and income and to determine different socio-economic groups in Imbasssaí.

In terms of tourism-related revenue flows, it is shown that approximately GBP54m enters the local tourism value chain per year. 96% (=GBP52m) of revenue is generated in the accommodation sector and 4% (=GBP2m) by the three remaining sectors together (food and drinks, shopping, entertainment/activities). Secondary supplies e.g. agricultural products are mainly sourced from outside the destination, which corresponds with Wagner's (1997) finding that tourism has little indirect impact on local economies in Brazil's Northeast. To improve the impact of tourism, it is suggested to increase backward linkages with other economic sectors, particularly considering that indirect impacts on poor communities are often significantly higher than direct impacts (Meyer, 2007; Mitchell, 2012).

Focusing on tourism-related income, it is identified that the accommodation sector has a low-income impact of GBP1m (=2% of GBP52m) due to employment at minimum salary levels in the large-scale hotel and resort and pousadas. The food and drinks sector provides (through employment at minimum salary in barracas and restaurants) half of the low-income impact (=GBP0.5m) of the accommodation sector. A pro-poor impact of GBP31k is identified in the food and drinks, shopping and entertainment/activities sectors. Although the monetary impact appears to be relatively small in comparison to the industry's turnover, tourism can be seen as a promising industry that provides benefits to poor- and low-income individuals (e.g. Ashley & Mitchell, 2008; Blake et al., 2008; Croes, 2014) - particularly, considering that prior to tourism development 'there was nothing' in Imbasssaí, tourism development means that numerous local people have directly moved into minimum salary positions. In this way, tourism contributes significantly to reducing income-poverty in the research location.

Poor-income is mainly generated from micro-entrepreneurship, whilst low-income jobs are semi- and unskilled positions such as waiters, cleaners and cooks. These job roles are mainly filled with non-white Brazilians (Preto and Pardo) who are from the Northeast. In contrast, tourism business owners and those in higher managerial positions are people from a white background (white Brazilians from the South - Branco, white Europeans and from other white backgrounds) who have moved to the Northeast. This disparity found in Imbasssaí seems to be a characteristic of the coastline in Brazil's Northeast and supports Pegas et al.'s (2015:762) assertion that tourism in Brazil might rather *"exacerbate entrenched and overlapping dichotomies of north/south, rich/poor and white/non-white".*

Using tourism-related income and race as the key defining characteristics, different socio-economic groups were determined: poor-income (Preto- and Pardo-Brazilians), low-income (Preto- and Pardo-Brazilians), higher-income (white Brazilians, white Europeans and other white).

Applying qualitative photo-elicitation and interviews, the research has intended to:

In Part 2 of this study, photo-elicitation and interviews were conducted to obtain a rich picture of the relationship between tourism, poverty and inequality.

(2) Analyse the value of tourism-related income through consumption and explore the distribution among different socio-economic groups

This study shows that tourism-related income is highly valued and seen as indispensable by both poor-income and low-income participants. In contrast, it appears that income from tourism is not of such crucial importance for higher-income participants as they describe that living in Imbassai (and having a tourism business) is more of a lifestyle choice than necessary for income generation. Since people value different things and accordingly use their income in different ways (i.e. for different commodities) to achieve well-being (Alkire & Santos, 2009; Foster & Sen, 1997), this study analyses patterns of consumption of the different socio-economic groups. Poor-income participants strongly emphasise that through tourism-related income they can achieve their basic functionings (being nourished, being sheltered and being healthy). Low-income participants explain that they use income to further improve their material conditions in terms of housing and goods (e.g. phone, car, TV). It appears that through buying commodities that are deemed to be customary in society (or: commodities of status, which higher-income individuals own); they feel able to achieve a higher status that is connected to wider acceptance and respect within society.

Contrasting the patterns of consumption between the poor-income and low-income group further, it becomes evident that poor-income participants use tourism-related income to improve their business to ensure income-generation, whilst low-income participants spend income on leisure time. The different foci can be understood considering the main job roles of each group: whilst poor-income participants are mainly micro-entrepreneurs, who are directly responsible for the success of their businesses, low-income participants are employed in tourism businesses and receive a monthly salary - even if the business is not doing well.

Higher-income participants placed strong emphasis on providing quality education for their children. However, even if their business is not doing well, it does not seem to influence their consumption patterns. Since functionings can still be achieved (without generating income from tourism), it supports the perception that tourism-related income is not primarily needed to sustain well-being for this socio-economic group.

(3) Examine opportunities resulting from tourism for different socio-economic groups and explore their value and distribution

Further valuable opportunities can be differentiated in terms of being individual opportunities, the opportunities that are linked through being directly involved in the tourism value chain, and societal benefits, the opportunities resulting from tourism development more generally. At the same time, capability expansion is limited since participants face individual challenges and wider societal costs due to tourism development.

For poor-income and low-income participants, the real opportunities identified encompass communicating with tourists, having cultural exchange and establishing relationships and friendships. Since both groups do not have the real opportunity of travelling abroad, communicating and engaging with tourists enables them to learn about other cultures, and more importantly, provides the opportunity of having access to and contact with the rest of the world - a dimension that is not particularly emphasised by previous studies. Higher-income individuals do not refer to these aspects (potentially since they have the real opportunity of travelling abroad), but place more importance on living in a natural environment and having a relaxed lifestyle.

Furthermore, participants value being with family, living close-by to work and being able to choose a better job (poor-income), being treated respectfully, having a good work-life balance and having personal development opportunities (low-income) and having access to commodities and amenities close-by (higher-income). However, despite their value, these are not real opportunities since tourism in its current form does not provide these. The limited choices of poor-income individuals, requiring them to migrate to another region (e.g. Hoffman, 2011; Truong, 2018; Wittemyer et al., 2008), accepting (often poor) working conditions and living in distance to the job because of second home development and non-affordable prices in the destination (e.g. Bianchi, 2011; Mbaiwa, 2017; Mihalic, 2015; Mutimucuio & Meyer, 2011; Muganda et al., 2010) are frequently discussed in the tourism literature. It seems to be a common phenomenon along Brazil's Northern coastline that *"many residents of its largely spontaneous settlements having been displaced from coastal homes by tourism development"* resulting in *"the prime coastline is being filled with exclusive second home and resort developments patronised mainly by “whites”, while the near littoral is being increasingly mobilised as a mainly “non-white” low-wage labour reservoir"* (Pegas et al., 2015:761). The results of this study reinforce this perception articulated by Pegas et al. (2015).

Low-income participants point out that working in tourism is connected with incidents of racism, poor working-conditions and a lack of development opportunities. The latter two are analysed by tourism scholars (e.g. Liu & Wall, 2006; Mihalic, 2015; Mutimucuio & Meyer, 2011; Scheyvens & Russel, 2012). In contrast with existing research, this study highlights that participants prefer working in a small-scale business environment since they feel treated with greater respect by superiors, whilst salary and development opportunities do not differ between small- and large-scale businesses, which contrasts with Scheyvens and Russel's (2012) study that suggests otherwise. Racist behaviour of domestic tourists towards service staff was a key issue impacting on the well-being of low-income employees - a topic that has not been sufficiently addressed and discussed in the tourism literature (Ruhanen & Whitford, 2018). It is found that racism in host-guest encounters is deeply rooted Brazil's traditional societal divisions between the non-whites from the poorer Northern regions and the whites from the richer South. Therefore, it can be argued that through host-guest relationships in tourism, existing divisions and inequalities might become extended and intensified.

Wider societal benefits and costs through tourism development are categorised into infrastructure, nature and environment, living space, access to goods and services, knowledge and culture, and safety and security - which are all categories that are addressed in the tourism literature (see: Section 8.2. Poverty and inequality in a tourism context). This study, in addition, analyses what are and what are not real opportunities in relation to these categories. Tourism development brings opportunities to Imbasssaí including better connection to adjacent areas and Bahia's capital Salvador, improved awareness on how to preserve the natural environment, and better access to goods, services and information.

Interestingly, some participants suggest that greater awareness of sustainability and environmental preservation among local people in Imbasssaí is linked to an ecological mind-set tourists bring to the destination. By tourists showing concern for the environment, it appears that the value of the environment is changed in the perception of the population, so that it becomes worthwhile protecting. This supports Daldeniz and Hampton's (2013) notion, that tourism can have positive educational effects in terms of environmental awareness and protection. On the other hand, participants emphasise that due to an inadequacy of the sewage system, uncontrolled and illegal infrastructure development for tourism and second home development, environmental protection is at risk - limiting participants' ability to live in a healthy, natural and clean environment. Furthermore, due to tourism and second home development, prices in the destination have been increasing, so that living in Imbasssaí is not affordable. Similarly, the feeling of living in a safe and secure environment is not achieved since people perceive that as a consequence of tourism development, drug abuse, violence and prostitution have increased, which corresponds to perceptions among locals identified in other studies (e.g. Almeida-García et al., 2016; Bwalya-Umar & Mubanga, 2018; Daldeniz & Hampton, 2013).

(4) Investigate power relations among actors within and between different spatial scales

In Imbassaí, large-scale and small-scale tourism co-exist with a high dependency on the domestic market, which contrasts with the classic assumption of dependency theory that only one pattern, large-scale tourism, with a focus on international tourists, exists (e.g. Chaperon & Bramwell, 2013). At the same time, however, the structure of the local tourism industry with tourism businesses being owned by white foreigners who employ non-white locals strongly reflects development patterns identified by dependency theory (e.g. Akama & Kieti, 2007; Bianchi, 2011; Jaenis, 2014; Lapeyre, 2011; Mbaiwa, 2017). In terms of core-periphery relations, the study shows Imbassaí's political dependency on the municipal city of Mata de São João, where decisions are made and resources allocated. There is the strong perception that resources are not distributed fairly (e.g. Chaperon & Bramwell, 2013), but to enhance infrastructure in Mata de São João and Praia do Forte. Praia do Forte is perceived as the economic core having power over resources that can be further used to advance development in Praia do Forte, whilst Imbassaí lags behind. Additionally, tourism development is affected by the lack of initiative from the Bahian government. Despite barriers and constraints for tourism, development is found to take place predominantly due to private initiatives - thus, stressing the importance of considering agency.

Agency becomes evident in social interactions between locals and the Prefeitura, in that an environmental group, formed by locals, seeks to influence decision-making at the municipal level mainly through the use of social media. Therefore, similarly to Erskine and Meyer (2012), this study indicates that knowledge in combination with access to a key resource enables the empowerment of locals to some extent within existing structures. The large-scale hotel and resort is considered a valuable resource by members of the Commercial Association in influencing policy and planning at the municipal level to support tourism development in Imbassai since 'on its own' the Commercial Association is perceived to have limited power. Nonetheless, in line with Chaperon and Bramwell's (2013) study, the Commercial Association seems to exert some sort of power and influence over the tourism industry within structural constraints.

Structural constraints and barriers for ensuring income generation and expanding capabilities become particularly evident for poor-income and low-income individuals. The ideology of white superiority is used as a means to exert power in the form structural domination. According to Skidmore (1992), the historical privilege and superiority of the white-skinned Brazilian elite has been used to disadvantage the non-white population all over Brazil. Poor-income and low-income participants seem to have internalised this ideology, which ultimately restricts their agency. This represents Giddens' duality of structure in that, on the one hand, the white race can be viewed as a medium by which people are perceived to exert power, and on the other hand, the superiority or domination of the white race can be considered an outcome reconstituted through agents' actions, meaning that by non-white poor- and low-income participants frequently referring to white superiority, they assign importance to it and reinforce the narrative. This structural constraint on non-white participants becomes evident in diverse social interactions (e.g. in community life between poor- and low-income individuals and higher-income individuals, in the work environment between employer and employees and between service-staff and tourists) and thus permeates and influences every aspect of people's lives. Despite white superiority, low-income participants working in small-scale pousadas also refer to their employers as family and describe occasions when employers used their financial resources to support employees to overcome difficult situations (e.g. illness of a family member who needs hospital treatment). This provides indication that superiors use power in the form of transformative capacity to support employees in sustaining their and their family's well-being.

A perceived lack of (inter-) actions and hidden networks are commonly considered to negatively influence tourism development. Poor-income individuals perceive that due to a hidden network between the white elite and officials from the Prefeitura new rules are enforced, that restrict them in generating income. This finding of elites having the power to prevent other groups from generating benefits from tourism development has been analysed in tourism studies (e.g. Bwalya-Umar & Mubanga, 2018; Islam & Carlsen, 2016; Knight & Cottrell, 2016; Reed, 1997). Higher-income individuals refer to a hidden network between officials of the Prefeitura and other actors (e.g. influential people in Praia do Forte and real estate companies) that hamper tourism development in Imbassai, whilst its' neighbouring economic core Praia do Forte and its' political core Mata de São João receive benefits. Ultimately, it appears that hidden networks are used by politicians to achieve personal goals. This aligns with Lacher and Nepal's (2010:963,964) view that *"peripheral regions in general in most developing countries have had to deal with […] political manipulation from central and regional governments".*

9.3. Review of the conceptual framework

Poverty and inequality in a tourism context is central to the study's conceptual framework, which is represented by the central position of the pyramid (see: Figure 9-1). Poverty and inequality are conceptualised by income, consumption and further valuable opportunities using Sen's capability approach. Sen's (1999:87) notion that a *"lack of income can be a principle reason for a person's capability deprivation"* is supported by this study since poor-income and low-income participants strongly emphasise the importance of generating tourism-related income to sustain their livelihoods. Furthermore, this study stresses the importance of analysing consumption patterns. It is shown that different socio-economic groups use tourism-income related income differently to achieve functionings, which supports the notion of *"people's differing 'conversion factors'"* (Alkire & Santos, 2009:125). An analysis of valuable opportunities shows that tourism provides 'much more' than income and consumption - thus, strengthening the importance of undertaking a comprehensive evaluation of real opportunities (Comim, 2010). This study shows that not only individual opportunities for people being directly involved in the tourism value chain, but, particularly, wider societal benefits due to tourism development are strongly valued. On the contrary, however, tourism development also creates challenges for individuals and costs for the wider public, with the consequence that capability expansion is confronted with barriers.

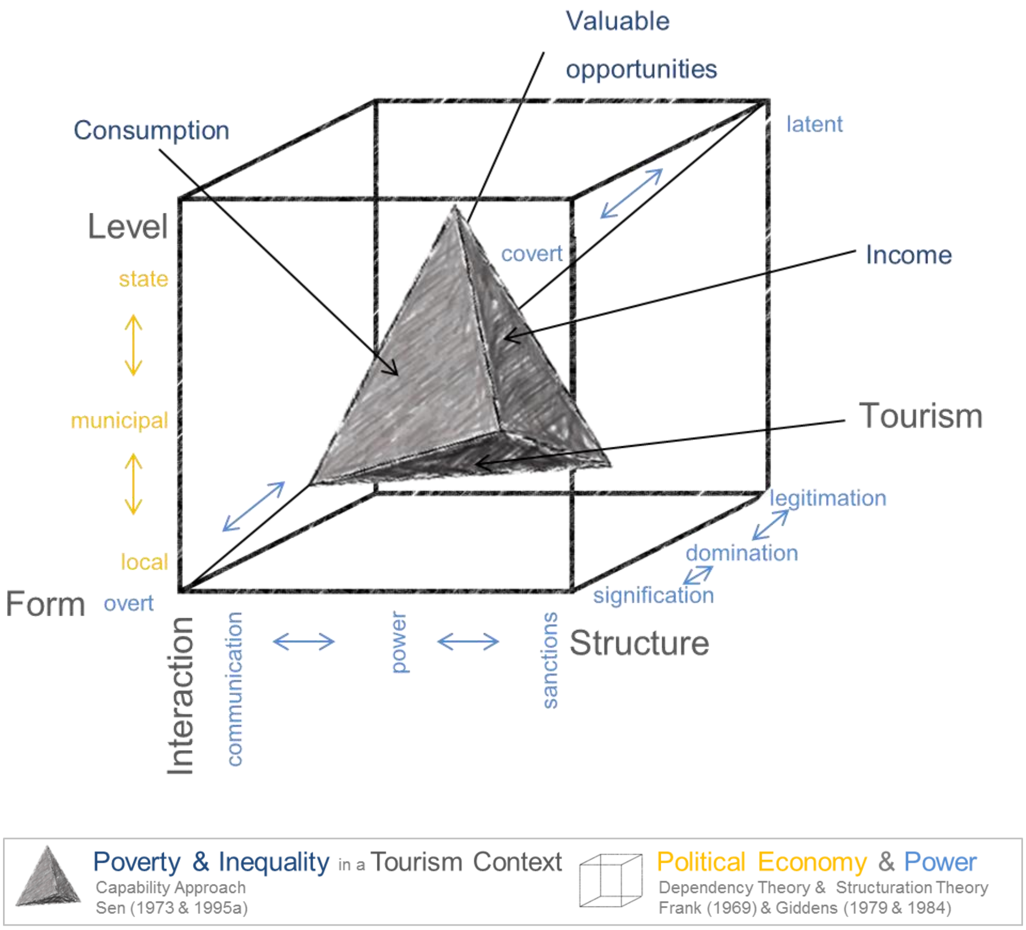

Figure 9-1: Reviewed framework

Source: Author

The pyramid representing poverty and inequality in a tourism context is placed in a cube that mirrors the political economy context with its multidimensional power relationships that surround and influence poverty and inequality (see: Figure 9-1). This study points out the importance of analysing the political economy context of tourism, poverty and inequality since it strongly influences the extent to which people escape poverty and can achieve well-being. It supports Bianchi's (2009 & 2018) argument that tourism cannot be evaluated detached from its political and economic context. Additionally, it emphasises the need to use Sen's capability approach in a broader sense to develop understanding of how power relations create barriers to people's livelihoods.

The political economy context is analysed using Frank's dependency theory and Giddens' structuration theory. Dependency theory argues that capitalism has caused underdevelopment due to unequal relations at any spatial scale between a 'developed core' possessing economic and political power and an 'undeveloped periphery' (Frank, 1969). Dependency relationships are identified at the local level and between the local level and wider spatial scales (municipal, state) - thus, emphasising the need for tourism research to take spatial inequalities at a smaller spatial scale into account rather than exclusively focusing on international dependency relationships. Additionally, there is not a 'clear-cut view' since power relations are intertwined, in that, for example, at the local level, international and national actors (tourism business owners and managers) viewed as foreigners interact with locals who are both natives of Imbassaí and migrants from Bahia. Both points support the argument that dependency theory needs more sophisticated applications (e.g. Meyer, 2011; Chaperon & Bramwell, 2013).

Structuration theory proposes that agency and structure are in a social relationship, which evolves over time and space since the repetitive actions of agents reproduce structure, which, in turn influences agency in such a way that it enables or restricts their activities - which is mirrored in the concept of the duality of structure (Giddens, 1979). Giddens (1979) considers power being integral to all social interactions, in which power is exerted *"through the utilisation of transformative capacity as generated by structures of domination"* (Giddens, 1979:92). Undertaking an in-depth analysis of power in social interactions, this study highlights the importance of differentiating between direct and indirect social interactions. Analysing power in direct social interactions, this study shows how the duality of structure emerges and structures (e.g. white superiority) are used as a medium to exert power and as an outcome reconstituted through agents' actions (Giddens, 1979). In indirect social interactions, power is perceived predominantly in the form of structural domination. In that regard, in (perceived) lack of (inter-) actions, 'not (inter-) acting' becomes a facility in itself exerting domination from one group over the other. Similarly, power in the form of domination is exerted by hidden interactions which links to Lukes' (1974, 2005) second form of covert power. Since (inter-) actions are not visible to others, they do not allow others to directly respond and therefore, to exert agency.

In this study, Giddens' structuration theory provides great insight into power relations among actors in a tourism context and therefore, this study supports the notion that Giddens' structuration theory is of value for studying this subject (e.g. Bramwell, 2007; Erskine & Meyer, 2012). It, particularly, adds value to and compliments dependency theory (e.g. Chaperon & Bramwell, 2013; Lacher & Nepal, 2010), in that alongside dependency relationships further barriers, mainly through ideological power (or in Lukes' (1974, 2005) terms, latent power), that prevent tourism from delivering development benefits are identified, whilst recognising and determining agency that enables development.

Despite the value of Giddens' structuration theory for studying this subject, it has the limitation of not considering the different forms of power after Lukes (1974, 2005). This study highlights the importance of examining the different forms of power since exertion of power takes place overtly through legitimisation, latently in the ideological belief of white superiority and covertly in hidden networks. Therefore, this study suggests integrating Lukes' (1974, 2005) forms of overt, covert and latent power into the final conceptual framework (see: Figure 9-1).

9.4. Contribution to knowledge

This study has aimed at developing the contribution to theory by applying Sen's capability approach, Frank's dependency theory and Giddens' structuration theory, and further developing the contribution to knowledge in tourism research by addressing the research gaps identified in the literature related to the themes of poverty and inequality, political economy and power (see: Table 9-a).

	Gaps in tourism research addressed in this study
Poverty and inequality	**Application of Sen's capability approach to develop understanding of multidimensional poverty and inequality** [e.g. Croes, 2012; Dorjsuren, 2014] **Connecting poverty analysis with the distribution of impacts** [e.g. Bianchi, 2017; Truong et al., 2014] **Qualitative and mixed-methods approaches to research multidimensional poverty and inequality** [e.g. Schilcher, 2007; Spenceley & Meyer, 2012; Truong et al., 2014]
Political economy	**Application of dependency theory to explore dependency relationships at smaller spatial scale** [e.g. Bianchi, 2015; Chaperon & Bramwell, 2013; Lacher & Nepal, 2010] **Application of dependency theory by drawing on wider sociel science theories** [e.g. Bianchi, 2017; Chaperon & Bramwell, 2013; Lacher & Nepal, 2010]
Power	**Application of Giddens' structuration theory to develop understanding of power as interplay between agents' transformative capacity and structural domination** [e.g. Bramwell, 2015; Bramwell & Meyer, 2007; Erskine & Meyer, 2012]

Table 9-a: Gaps in tourism research
Source: Author

Furthermore, a lack of previous studies has been identified in relation to the research location, Brazil's Northeast (see: Section 4.3.3. Studying tourism, poverty and inequality in Brazil's Northeast - a justification and Section 4.5. Tourism research in Brazil's Northeast - the current state of knowledge), and in relation to one of the chosen qualitative research methods, namely, photo-elicitation (see: Section 5.4.2. Qualitative photo-elicitation and interviews).

This section continues by emphasising the study's contribution to theory and to knowledge in the different areas of poverty and inequality, political economy and power, and the contribution in relation to the location and in relation to the method of photo-elicitation.

Contribution to theory

The contribution of this study to theory is threefold. Firstly, this study identifies the limitations of Sen's capability approach when it is applied narrowly focusing on evaluating capabilities and functionings without taking the political economy context into account. This study shows how existing (power) structures create barriers to people's agency in expanding capabilities and achieving functionings. Therefore, an evaluation of capabilities and functionings cannot be conducted detached from the political and economic context demonstrating the applicability of Sen's capability approach in a broader sense. Secondly, the study highlights the limitations of dependency theory in considering power purely from a structuralist perspective that ignores the power of human agency in transforming structures. Thirdly, although Giddens' structuration theory adds value for studying power relations in a tourism context by considering power as interplay between structural domination and agents' transformative capacity, this study emphasises the importance of integrating the different forms of power after Lukes (1974, 2005) into the analysis.

Contribution to knowledge of poverty and inequality in tourism research

This study evaluates capabilities, real opportunities, of different socio-economic groups and explores how tourism contributes to achieving these using Sen's capability approach, which has become a key theoretical framework about development, yet it has been less frequently applied in tourism research (Croes, 2012; Dorjsuren, 2014). Firstly, by applying Sen's capability approach, this study provides insights into multidimensional poverty, whereas to date tourism research tends to focus on economic poverty using income as key indicator (e.g. Schilcher, 2007; Spenceley & Meyer, 2012). Secondly, by linking the evaluation to different socio-economic groups defined as poor-income, low-income and higher-income, this study connects poverty analysis with distributional aspects and thus, advances knowledge on inequality in a tourism context (e.g. Bianchi, 2018; Bwalya-Umar & Mubanga; 2018; Truong et al., 2014).

Focussing on tourism-related income, the study shows tourism provides livelihood to poor-income and low-income individuals in Imbassaí - particularly, considering that prior to tourism development, they did not have any opportunity to generate income. In this way, tourism significantly contributes to reducing income-poverty. Furthermore, poor- and low-income participants strongly emphasise the importance of tourism-related income - which supports Sen's (1999) notion that lack of income can be a main cause of people's capability deprivation. In consequence, 'income' cannot be neglected in studies focusing on tourism and poverty alleviation.

Analysing patterns of consumption of socio-economic groups, which to date is almost entirely lacking in the tourism literature, it is shown that poor-income and low-income individuals use their tourism-related income, firstly, to achieve basic functionings, and secondly, to achieve work-related functionings to further ensure income generation (poor-income individuals) and to achieve material wealth related functionings and leisure-related functionings (low-income). The latter seems to be related to achieving a higher status that brings acceptance and respect from the society, which particularly emphasises the need to take relative dimensions of poverty into account instead of purely focusing on absolute poverty (e.g. Sen, 1983; Spicker, 2004; Townsend, 1979).

In terms of valuable opportunities of being involved in the tourism value chain, there is a strong emphasis on 'having access to the world' among poor-income and low-income participants - something which has not been emphasised in tourism literature to date. In contrast, higher-income individuals, who already have access to the world through travelling abroad, consider having a tourism business and living in Imbassaí as an opportunity that enables them to live in a natural environment and have a relaxed lifestyle, although this lifestyle choice confines them in some aspects of their lives. Poor-income individuals consider migrating to the coast and having no alternative than to do the job they do as constraints, whilst much of the narrative of low-income individuals was linked to disrespectful, even racist, encounters at the workplace between employer/manager and staff, and between domestic tourists and staff. In this way, tourism seems to amplify pre-existing inequalities between the white and the non-white - which is a topic worthwhile exploring since to date limited research on racism and discrimination in a tourist context is available (Ruhanen & Whitford, 2018).

In summary, the key contribution of this study to the theme of poverty and inequality in a tourism context lies in moving beyond an analysis of economic poverty towards developing understanding of multidimensional poverty and inequality by applying Sen's capability approach. In particular, the analysis of patterns of consumption provides new insights on how people use their income to achieve functionings.

Contribution to knowledge of political economy in tourism research

In general, this study emphasises the significance of taking a political economy perspective to study the relationship between tourism, poverty and inequality. Using Frank's dependency theory to analyse the political economy context, this study specifically points out the importance of considering dependency relationships at any spatial scale - and not only focusing on structural inequalities at the international level (Bianchi, 2015; Chaperon & Bramwell, 2013; Lacher & Nepal, 2010; Mosedale, 2011). It is shown that dependency relationships exist within the local level and between the local level and other spatial scales (municipal, state) creating barriers for tourism development in Imbassaí.

In political economy studies in tourism, power is frequently treated as an underlying theme as given in the structural domination (Mosedale, 2011; Bianchi, 2018; Church & Coles, 2007). To overcome the "*unsophisticated" and* "*overly simplistic"* application of dependency theory in tourism research to date (Chaperon & Bramwell, 2013:151 & 2013:134), this study conceptualises power as interplay between structure and agency by drawing on wider social science literature.

Contribution to knowledge of power in tourism research

This study draws on Giddens' structuration theory, which to date has received little attention in tourism research despite its perceived value (Bramwell, 2007; Erskine & Meyer, 2012). It is shown that people exert agency over the local tourism industry, in general, and, more specifically, over their livelihoods, within structural constraints. Thus, it is emphasised that locals *"do not sit around passively"*, but actively use their agency to encourage change where possible (Jamal & Dredge, 2015:184). This study supports Giddens' (1979) notion that the possibility of encouraging change depends on the availability of and access to resources. The findings, in particular, indicate that access to social media can enable to some extent empowerment for locals within existing structural constraints - which is a topic worthwhile exploring in the context of tourism, poverty and inequality.

A structural constraint/barrier for non-white locals (poor- and low-income individuals) in exerting agency particularly lies in the ideology of white superiority - that is used 'latently' by the white higher-income group to exert domination. It appears that non-white locals have internalised this view to some extent, thereby restricting their own transformative capacity. Additionally, this study shows that hidden networks describe a barrier for people in exerting agency, in that it takes away people's opportunity to intervene in the course of events. As a consequence, hidden networks are perceived to negatively influence tourism development, and to restrict people in generating equitable income and benefits from tourism in Imbassaí.

Contribution to knowledge in relation to tourism Brazil's Northeast

To date little is known about tourism in Brazil's Northeast (Pegas et al., 2015). This particularly relates to the theme of poverty and inequality in a tourism context, since to date research has predominantly used a quantitative approach to measure the impacts of tourism on poverty and inequality using income as a key indicator between the North and the South (see: 4.5.Tourism research in Brazil's Northeast - the current state of knowledge). Using a mixed-methods approach that combines quantitative value chain analysis (VCA) and qualitative photo-elicitation and interviews, this study provides greater insight into and more in-depth understanding of what poverty and inequality really means to people living in Brazil's Northeast and how tourism influences their livelihoods. Furthermore, the topic of power relations in tourism, particularly, in a development context, has received limited attention by scholars studying Brazil and Brazil's Northeast. This study particularly identifies how power relationships at different spatial scales both prevent and enable people to sustain their livelihoods.

Contribution to knowledge in relation to the method of photo-elicitation

Visual methodologies have been increasingly applied across the social sciences (Rose, 2016), yet tourism research has not embraced visual methodologies (Brickell; 2012; Garrod, 2008). It is emphasised that, in particular, tourism research does not use participant-generated images to uncover perceptions of locals (Brickell, 2012). Having applied photo-elicitation in this study, the benefits and pitfalls of this method were identified in Section 5.8.2. Research methods, data collection and analysis have become apparent. In this section, it is worthwhile highlighting two issues that contrast with the current perception portrayed in the literature. Firstly, images are considered to have the potential of visualising social relations and difference (Fyfe & Law, 1988; Hodgetts et al., 2007a) and Rose (2016:308) adds that all visual methods, and particularly photo-elicitation, aim *"to explore and account for social difference and hierarchy".* However, in this study, photos rarely provide material to explore such social difference and hierarchy. There is no clear answer as to why in this study photo-elicitation did not enable access to people's perceptions on social imbalances, but it might have been influenced by ethical guidelines, fear to express these and/or lack of trust between researcher and participant. Secondly, to establish trust between researcher and participants an initial briefing is suggested (Rose, 2016). However, in this study, it has been proven to be difficult to encourage people to participate without having a pre-established relationship. Therefore, it is argued that one meeting is not sufficient for establishing trust between the researcher and research participants.

9.5. Limitations and recommendations for future research

This study on the relationship between tourism, poverty and inequality is unique to its research location: Imbassaí, which is a small coastal destination in the municipality of Mata de São João in the state of Bahia in the Northeast of Brazil. The study intended to portray the perspectives on tourism, poverty and inequality of different socio-economic groups living in Imbassaí - thus, not seeking to provide generalisations. It would be interesting to get insights into further research locations in Brazil's Northeast to allow for comparisons, learn from other studies and to develop a more holistic picture of tourism, poverty and inequality in that context.

The study was conducted during a period in Brazil that has been described as *"the worst recession in history"* (CNN, 2017:online). This particular situation potentially impacted on the study findings, in that tourist numbers and expenditure might have been lower and people's negative perceptions might have become dominant over positive ones due to the political economy context. Thus, it is suggested to continue longitudinal research in the study location to analyse how perceptions on poverty and inequality change - although it might be difficult to identify the specific influencers of such change. It would be of particular interest to explore how power relations may have changed over time and to what extent locals acknowledged their power, use their power to make their voice heard and encourage change.

The mixed-methodological approach applied combined quantitative value chain analysis (VCA) and qualitative photo-elicitation and interviews in a sequential manner. While quantitative VCA facilitates in-depth insights into the local tourism value chain, its actors, issues and challenges, VCA does have inherent weaknesses related to the validity of quantitative results, which are discussed in Section 5.8 Critical reflections. In brief, the main weaknesses are that, firstly, participants often simply do not know the numbers such as the occupancy rate or the amount of dishes served and sometimes they do not want to share the (accurate) data. Secondly, the required sample sizes are relatively small, and thirdly, guidance on calculating the impacts is limited. Since VCA was used as a baseline to define socio-economic groups, this weakness might extend further. This links with the difficulty of defining suitable thresholds and using appropriate lines (e.g. poverty line) to categorise people into socio-economic groups. Thus, it was particularly important not to only use numbers, but apply a qualitative approach based on photo-elicitation and interviews to show people's perspectives on what poverty and inequality means to them and how tourism influences both - which was the main intention of this study.

People from different socio-economic groups and different nodes/sectors of the local tourism value chain engaged in photo-elicitation and interviews. Unfortunately, the sample did not include people from outside the destination e.g. officials from the municipality, representatives of tourism in Praia do Forte. This would have enabled additional insights from the outsiders' perspectives - which would have been particularly beneficial in investigating power relations at different scales. Key tourism stakeholders were contacted; however, they did neither offer availability nor show interest in participation. Overall, the qualitative part of the study drew on a sample of 37 participants - 24 participants engaged in the photo-elicitation project and further 13 participants engaged in interviews. Whilst this was an appropriate sample size, it mirrors only a few perspectives from each socio-economic group and each node of the tourism value chain. To address this issue and gather more perspectives, a team of researchers would be needed since conducting such a photo-elicitation project is very time-intensive.

It would, on the other hand, be valuable to focus on gathering the perspectives of a specific sector or socio-economic group using a small sample size to allow for closer interaction with participants during the photo-elicitation project, which could enable more in-depth insight.

Future research on tourism, poverty and inequality could incorporate the following themes, which have been identified in this study, but which currently are insufficiently analysed and discussed in the wider tourism literature to date:

- patterns of consumption i.e. what is tourism-related income used for,
- tourism as a means to provide access to the world for marginalised communities,
- the role of racism and discrimination in host-guest relationships,
- the use of social media as a tool for empowerment, and
- the influence of ideological power using Lukes' (1974, 2005) third form of latent power and
- the influence of hidden agendas and networks using Lukes' (1974, 2005) second form of covert power.

In particular, the latter two are of interest in a Brazilian context due to the country's history of the ideology of white superiority and high levels of corruption that takes place covertly.

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Appendices

Appendix 1: Executive Summary (Value Chain Analysis)

Executive Summary: Tourism Value Chain Analysis in Imbassaí

by Theres Winter, Sheffield Hallam University [Email: t.winter@shu.ac.uk]

July 2017

Aim

The main aim of the research was to examine how much money tourists spend in the destination and how money flows across different service providers (e.g. accommodation, food and drinks, activities, shopping) and suppliers.

The examination informs us how to improve the economic impact of tourism and the tourist experience.

Background

- The fieldwork was carried out from 20th February to 22nd March 2017 in the destination (including Carnival season) using a standard methodology
- The fieldwork included:
    - a survey with representatives of local tourism businesses
    - a survey with tourists
- 59 structured face-to-face interviews, lasting between 10 minutes and 1,5 hours, were conducted with representatives of local tourism businesses from each node of the value chain (accommodation, food and drinks, shopping, entertainment/ activities)
- Using a combination of a self- and interviewer-administered approach, the tourist survey comprised 75 participants

Key findings: survey with tourism representatives

- The destination has an established accommodation sector offering various options for tourist with different budgets to stay (e.g. camping, hostel, pousada, hotels) and diverse restaurants to cater for tourists' wishes
    - The 'average' occupancy rate for 'pousadas' is with app. 40% low; in contrast, hotels achieve a significantly higher occupancy rate
    - The' average' pousada is not officially classified (apart from booking.com ratings), has a size of 36 beds and offers a (double-bed) room for 272 R$ per night[1]

[1] It needs to be acknowledged that the prices vary greatly depending on high and low season, for example, during Christmas and New Year, the prices can be three times higher than in July/ August.

- The impact of the hospitality sector (accommodation, food and drinks) on the local economy is significant in terms of direct employment since, to a large extent, local people are employed in these businesses
- Local linkages between the hospitality sector and suppliers (e.g. agriculture) are weak, because the number of suppliers is low and often products do not have an adequate quality and service is poor/ not reliable
- Imbassaí has a few options for shopping (e.g. clothes, craft) including formal shops and beach hawkers; however, the economic impact appears to be limited
- Entertainment, activities and excursion offers for tourists are limited and it is not *easy* for tourists to find out what is offered
- Key challenges that were communicated by participants were:
    - Short season & high dependency on seasonality
    - Lack of government support and investment
    - Weak tourist infrastructure (e.g. signing and offer of entertainment, activities and excursions)
    - Quality and motivation of staff
    - Strong concerns about security/ safety and environmental issues (e.g. waste management)

<u>Key findings: survey with tourists</u>

- Key market segments are independent leisure travellers - the majority is from Brazil, especially Bahia; but there is also a significant proportion of international travellers from Germany, Switzerland and Argentina
- With approximately 10 days, international travellers were found to stay significantly longer than national travellers
- For a 10-day trip, international travellers spend around 1,337 EURO (=5,000 R$), while domestic travellers spend around 432 EURO (= 1,615 R$) for a 5-day stay
    - accommodation: international tourists spend more for accommodation per night, which indicates that they are willing to pay for a 'good quality' of service
    - food and drinks: domestic tourists spend more for food and drinks, especially at the beach; reasons for lower spending of international tourists for food and drinks is that they are not familiar with the items and these cannot be explained by staff due to language barriers
    - shopping: international tourists spend more on shopping items (e.g. souvenirs)
    - entertainment/ activities/ excursions: international tourists rarely spend money for entertainment, activities and excursions - but if so, they spend a significantly higher amount than domestic tourists

- The majority of participants rate Imbassaí as a 'very good' tourist destination; however, tourists also see potential for improvement
    - Wider offer of entertainment, activities or excursions
    - Higher service quality e.g. information about offers, cash-machine and English-speaking personnel
    - Higher security/ safety standards
    - Improved tourist infrastructure (e.g. signing, transport)

Initial 'short-term' suggestions

- Use the rating of tourists as 'very good' to attract tourists
- Increase and/ or communicate entertainment/ activities offers more clearly and effectively, in particular to international tourists[2]
- Get a cash-machine installed
- Have information (e.g. menu) available in English
- Improve communication in terms of security/ safety, for example, communicate contact numbers through posters/ flyers in accommodation and have lifeguards at the beach
- Invest into local tourist signing i.e. where can a tourist find what
- Communicate transport options (e.g. bus/ taxi to Praia do Forte)

Long-term considerations

- What can be done to improve 'occupancy rates'?
- How to improve linkages with local suppliers to create a 'win-win' situation for both, tourism businesses and suppliers?
- What are options to improve the impact of tourism and tourist experience, for example, in terms of shopping (e.g. local produced handicraft) and entertainment, activities and excursions?
- What can be done to extent the season and decrease dependency on seasonality?
- How to improve tourism education and training for staff?
- What needs to be done to handle security/ safety as well as environmental issues?

[2] International tourists want information provided, before having to ask.

Appendix 2: Overview of tourism policies and plans

Focus area	Level	Document	Type of Document	Link
Tourism	National	Plano Nacional de Turismo 2013-2016	Plan	http://www.turismo.gov.br/images/pdf/plano_nacional_2013.pdf
Tourism	National	Lei Geral do Turismo - Lei nº 11.771/2008	Legislation	http://www.planalto.gov.br/ccivil_03/_ato2007-2010/2008/lei/l11771.htm
Tourism & Regionalisation	National / Regional	Programa de Regionalização do Turismo - Diretrizes, 2013	Program	http://www.turismo.gov.br/acesso-a-informacao/63-acoes-e-programas/5019-programa-de-regionalizacao-do-turismo-diretrizes
		PORTARIA Nº 105, DE 16 DE MAIO DE 2013 (Regionalisation Program)	Legislation	http://www.turismo.gov.br/legislacao/?p=93
		PORTARIA Nº 144, DE 27 DE AGOSTO DE 2015 (Categorisation)	Legislation	http://www.turismo.gov.br/legislacao/?p=822
		PORTARIA Nº 172, DE 11 DE JULHO DE 2016 (Mapa do Turismo Brasileiro)	Legislation	http://www.turismo.gov.br/legislacao/?p=1061
Tourism	State - Bahia	Plano de Desenvolvimento Integrado do Turismo Sustentável, 2012	Plan	http://www.setur.ba.gov.br/arquivos/File/PDITSbts.pdf
Tourism	State - Bahia	Planos de Desenvolvimento Integrado do Turismo Sustentável, Detailed Plans	Plan	http://www.setur.ba.gov.br/modules/conteudo/conteudo.php?conteudo=27
Tourism	State - Bahia	Planejamento Estratégico, 2016	Plan	http://www.setur.ba.gov.br/modules/conteudo/conteudo.php?conteudo=26
Tourism	State - Bahia	LEI Nº 12.933 DE 09 DE JANEIRO DE 2014	Legislation	http://www.setur.ba.gov.br/arquivos/File/leiestadualdoturismo.pdf
Tourism	Municipality - Mata de São João	Plano de Fortalecimento Municipal e Gestao do Turismo e do Patrimonio Natural e Cultural, 2011	Plan	http://www.setur.ba.gov.br/arquivos/File/pmgtmata.pdf
Tourism & Investment	National	Diverse	Legislation	http://investimento.turismo.gov.br/legislacao.html
Tourism & Training	National	Diverse	Legislation	http://pronatec.turismo.gov.br/legislacao.html
Tourism & Statistics	National	Diagnóstico e Plano Estratégico de Estatísticas Turísticas Nacionais, 2015	Plan	http://www.dadosefatos.turismo.gov.br/images/pdf/Plano_nacional/Plano_Nacional_Estategico_Estatisticas_Turismo_Relatorio_Final.pdf

Focus area	Level	Document	Type of Document	Link
Tourism & Poverty	National	Turismo sustentável e alívio da pobreza no Brasil: reflexões e perspectivas	tbd	http://livros01.livrosgratis.com.br/tu000017.pdf
Tourism & Poverty	National	Manual para a reducao da pobreza por meio do Turismo, 2012	Manual	http://www.oit.org.br/sites/default/files/topic/gender/pub/guia%20turismo%20sustent%C3%A1vel_957_964.pdf
Poverty	National	Plano Brasil sem miséria	Plan	http://www.brasil.gov.br/cidadania-e-justica/2013/08/municipios-terao-ate-sexta-feira-16-para-cadastrar-propostas-de-seguranca-alimentar-e-nutricional/plano-brasil-sem-miseria.pdf
Security	National	Plano de segurança	Plan	http://www2.planalto.gov.br/acompanhe-planalto/noticias/2017/01/plano-de-seguranca-estabelece-metas-para-reducao-de-crimes
Infrastructure	National	Plano Brasil de Infraestrutura Logística, 2013	Plan	http://www.cfa.org.br/servicos/publicacoes/planobrasil_web1.pdf
Agriculture	National	Perspectivas Agrícolas, 2015-2024	Plan	http://www.fao.org.br/download/PA20142015CB.pdf
	National	PLANO AGRÍCOLA E PECUÁRIO 2016/2017	Brochure	http://www.seagri.ba.gov.br/sites/default/files/plano_agricola_pecuario_nacional.pdf
Economy	National	Active with Brazil, 2015	Brochure	
Tourism & Culture	National	ESTUDOS DA COMPETITIVIDADE DO TURISMO BRASILEIRO		http://www.turismo.gov.br/sites/default/turismo/o_ministerio/publicacoes/downloads_publicacoes/O_TURISMO_CULTURAL_NO_BRASIL.pdf
Tourism & Culture	National	TURISMO CULTURAL: Orientações Básicas 3ª Edição		http://www.turismo.gov.br/sites/default/turismo/o_ministerio/publicacoes/downloads_publicacoes/Turismo_Cultural_Versxo_Final_IMPRESSxO_.pdf
Culture	National	METAS DO PLANO NACIONAL DE CULTURA, 2011		http://www.cultura.gov.br/documents/10883/11294/METAS_PNC_final.pdf/

Appendix 3: Questionnaires for each sector of the tourism value chain

English Version

Questionnaire 'Accommodation'

Enterprise information

(1) What is the name of the enterprise?

Name Location Ownership

(2) Main contract person

Name ______________________

Address ______________________

Phone ______________________

Email ______________________

(3) What type of accommodation is available?

- [ ] Pousada
- [ ] Hotel - just bed
- [ ] Hotel - bed & breakfast
- [ ] Hotel - all-inclusive
- [ ] Guesthouse/ hostel
- [ ] Camping
- [ ] Other ____________

(4) What services are available, at extra charge to guests?

- [ ] Airport transfer
- [ ] Spa treatment
- [ ] Restaurant
- [ ] Business centre
- [ ] Shuttle service
- [ ] Guiding

- [ ] Bar
- [ ] Babysitting
- [ ] Postal/ courier service
- [ ] Tour booking
- [ ] Cultural visits
- [ ] Car rental
- [ ] Golf
- [ ] Horse-riding
- [ ] Boating/ canoeing
- [ ] Other ______________________

(5) Do you have meeting room facilities available?

- [ ] Yes
- [ ] No

If yes, ...

[ ] number of meeting rooms

[ ] total seating capacity of all rooms

(6) Do you have conferencing facilities available?

- [ ] Yes
- [ ] No

If yes, ...

[ ] Number of meeting rooms

[ ] Total seating capacity of all rooms

Rooms, Sites and Rates

(7) What accommodation is available?

☐	Quality rating
☐	Rack rate (average)
☐	Number of rooms
☐	Number of beds

(8) How many people are employed?

☐ Number of employees (high season) ☐ Number of employees (low season)

In the high-season, how many people are...?

	Employees	female	male
Managerial			
Skilled & semi-skilled			
Unskilled			
Total			

	Employees	...from the local community [within 30 km]	...external to the local community [from Bahia]	....from other states than Bahia [from Brazil]	...expatriats [international]
Managerial					
Skilled & semi-skilled					
Unskilled					
Total					

	Employees	Afro-Brazilian [Preto & pardo]	White-Brazilian [Branco]	Other
Managerial				
Skilled & semi-skilled				
Unskilled				
Total				

(9) What are the average monthly salaries?

	Empregados/as	...from the local community [within 30 km]	...external to the local community [from Bahia]	....from other states than Bahia [from Brazil]	...expatriats [international]
Managerial					
Skilled & semi-skilled					
Unskilled					
Total					

Is there a difference related to origin?

☐ Yes

☐ No

If so, can you explain?

	Employees	Afro-Brazilian [Preto & pardo]	White-Brazilian [Branco]	Other
Managerial				
Skilled & semi-skilled				
Unskilled				
Total				

Is there a difference related to ethnicity?

- [ ] Yes
- [ ] No

If so, can you explain?

Is there a difference related to season?

- [ ] Yes
- [ ] No

If so, can you explain?

Do employees get other benefits?

(10) What are the 'typical tips'?

[ ] in % of contracted salary for staff

(11) What are the dates of the low/high season?

[ ] low season

[ ] high season

(12) What is the typical staff turnover?

[ ] % per year

(13) What were your staff typically doing before they worked for you?

Skilled and semi-skilled

Unskilled

<u>Your customers</u>

(14) What proportion of your customers are...?

[ ] Business travellers

[ ] Holiday/ leisure travellers

[ ] Visiting friends and relatives

[ ] Other

(15) How are they traveling?

	Independent	Package
Business travellers		
Holiday/ leisure travellers		
Visiting friends and relatives		
Other		

(16) What proportion of your customers are from…?

☐ the local areas [within 30 km]

☐ Bahia

☐ Brazil

☐ Other countries

From which countries are they?

☐

(17) How many people stayed at the enterprise overnight over the past year (2016)?

☐ People

Or complete the following table:

☐ Room occupancy (low season) (in %)

☐ Room occupancy (high season) (in %)

☐ Average room occupancy (in %)

(18) How many nights did each person stay for, on average?

	Nights

(19) How many additional day visitors did you have over the past year (2016)?

	Visitors

<u>Costs and revenue</u>

(20) Cost structure of hotel operations (2016):

			% of good by value from:			
	Expendi-ture	% of total operating costs	local [30km]	domestic [Bahia]	domestic [Brasil]	inter-national
Staff						
Food & beverage						
Power & utilities (electricity, water, …)						
Debt cost						
Other						
Total						

(21) What was your revenue in the last year? (2016)?

Type of revenue	**Revenue**
Rooms	
Meeting & conferencing	
Food & beverages	
Other	
Total	

<u>Market access and markeing</u>

(22) How do you market/advertise your business?

- [ ] Signposts
- [ ] Posters
- [ ] Flyers
- [ ] Internet - specify: ____
- [ ] Guide books - specify: ____
- [ ] Through local tourism enterprises
- [ ] Government
- [ ] Tour operators - specify: _____________________________________
- [ ] 'Word-of-mouth'
- [ ] Through local people
- [ ] Newspaper/ magazines - specify:____
- [ ] Tradeshows - specify: ____
- [ ] Other - explain: ____

<u>Challenges and opportunities</u>

(23) What are the problems associated with starting and operating a business in this area?

Internal Challenges: Those that occur within your business that you can influence

Challenge	**Yes/ No**	
Skills of staff		
Marketing/ advertising		
Lack of customers		
...		
...		

External Challenges: Those that occur outside your business; that have an effect on your business but cannot be influenced

Challenge	**Yes/ No**	
Land		
Tourist visa		
Infrastructure		
Country-level marketing		
Tourist perceptions		
...		
...		

(24) What is needed to grow your business?

(25) What is needed to increase procurement linkages with local suppliers and services (forward and backward)?

(26) Do you have any further comments?

Thank you!

English Version

Questionnaire 'food & drinks'

Enterprise information

(1) What is the name of the enterprise?

Name Location

(2) Main contract person

Name ________________

Address ________________

Phone ________________

Email ________________

(3) Please describe your business:

☐ Number of tables

☐ Number of chairs

☐ Number of meals sold per month

Location ________________

Ownership ________________

% of sales to tourists ________________

Number of similar establishments in the area ________________

(4) How many people are employeed in your business?

☐ Employees

English Version

How many people are...?

	Employees	female	male
Managerial			
Skilled & semi-skilled			
Unskilled			
Total			

	Employees	...from the local community [within 30 km]	...external to the local community [from Bahia]	...from other states than Bahia [from Brazil]	...expatriats [international]
Managerial					
Skilled & semi-skilled					
Unskilled					
Total					

	Employees	Afro-Brazilian [Preto & pardo]	White-Brazilian [Branco]	Other
Managerial				
Skilled & semi-skilled				
Unskilled				
Total				

(5) What are the average monthly salaries?

	Empregados/as	...from the local community [within 30 km]	...external to the local community [from Bahia]	...from other states than Bahia [from Brazil]	...expatriats [international]
Managerial					
Skilled & semi-skilled					
Unskilled					
Total					

Is there a difference related to origin?

☐ Yes

☐ No

If so, can you explain?

	Employees	Afro-Brazilian [Preto & pardo]	White-Brazilian [Branco]	Other
Managerial				
Skilled & semi-skilled				
Unskilled				
Total				

Is there a difference related to ethnicity?

☐ Yes

☐ No

If so, can you explain?

Supply chain

(6) From where do you get your supplies & what is you average spending on supplies (each month)?

What?	From where?	How much?
Meat		
Fish		
Vegetables		
Fruit		
Cereals		
Dry goods		
Water & juices		
Alcohol		
Other		

(7) What are your average monthly sales?

Real

Challenges and opportunities

(8) What are the problems associated with starting and operating a business in this area?

Internal Challenges: Those that occur within your business that you can influence

Challenge	**Yes/ No**	
Skills of staff		
Marketing/ advertising		
Lack of customers		
...		
...		

External Challenges: Those that occur outside your business; that have an effect on your business but cannot be influenced

Challenge		**Yes/ No**	
Land			
Tourist visa			
Infrastructure			
Country-level marketing			
Tourist perceptions			
...			
...			

(9) What is needed to grow your business?

(10) What is needed to increase procurement linkages with local suppliers and services (forward and backward)?

(11) Do you have any further comments?

Thank you!

English Version

Questionnaire 'Shopping'

Enterprise information

(1) What is the name of the enterprise?

Name Location

(2) Main contract person

Name ____________________

Address ____________________

Phone ____________________

Email ____________________

(3) Please describe your business:

Type of business *Formal shop, craft stall, etc*

Location ____________________

Ownership ____________________

% of sales to tourists ____________________

Number of similar establishments in the area ____________________

(4) How many people are employeed in your business?

[ ] Employees

English Version

How many people are...?

	Employees	female	male
Managerial			
Skilled & semi-skilled			
Unskilled			
Total			

	Employees	...from the local community [within 30 km]	...external to the local community [from Bahia]	...from other states than Bahia [from Brazil]	...expatriats [international]
Managerial					
Skilled & semi-skilled					
Unskilled					
Total					

	Employees	Afro-Brazilian [Preto & pardo]	White-Brazilian [Branco]	Other
Managerial				
Skilled & semi-skilled				
Unskilled				
Total				

(5) What are the average monthly salaries?

	Empregados/as	...from the local community [within 30 km]	...external to the local community [from Bahia]	...from other states than Bahia [from Brazil]	...expatriats [international]
Managerial					
Skilled & semi-skilled					
Unskilled					
Total					

Is there a difference related to origin?

☐ Yes

☐ No

If so, can you explain?

	Employees	Afro-Brazilian [Preto & pardo]	White-Brazilian [Branco]	Other
Managerial				
Skilled & semi-skilled				
Unskilled				
Total				

Is there a difference related to ethnicity?

☐ Yes

☐ No

If so, can you explain?

Products

(6) Are you producing yourself?

- [ ] Yes
- [ ] No

If so, what are you producing?

(7) What is the percentage of sales from own production?

% (of value, not of products)

(8) From where do you get your supplies & what is you average spending on supplies (each month)?

What?	From where?	How much?
Metallic craft		
Paintings		
Wooden articles		
Garments, t-shirts, scarves		
Postcards, booklets, etc.		
...		
...		
...		

(9) What proportion of your suppliers come from...?

☐ the local area (within 30km)?

☐ Bahia

☐ Brazil

<u>Sales and costs</u>

(10) What is the price range of your products?

☐ Price of cheapest product

☐ Price of most expensive product

(11) What is the average value of sales per tourist that purchases from you?

☐ Average value

(12) How many tourists purchase from you per month on average?

☐ Tourists

(13) How many units (items) do you sell per month?

☐ Units/ items

(14) Do you pay rent for your premises?

☐ Yes

☐ No

If yes, what is the rent per month?

☐ Rent per month

(15) What other major costs (apart from supplies and rent) do you incur?

Type of cost	Cost per month

Challenges and opportunities

(16) What are the problems associated with starting and operating a business in this area?

Internal Challenges: Those that occur within your business that you can influence

Challenge	Yes/ No	
Skills of staff		
Marketing/ advertising		
Lack of customers		
...		
...		

External Challenges: Those that occur outside your business; that have an effect on your business but cannot be influenced

Challenge		Yes/ No	
Land			
Tourist visa			
Infrastructure			
Country-level marketing			
Tourist perceptions			
...			
...			

(17) What is needed to grow your business?

(18) What is needed to increase procurement linkages with local suppliers and services (forward and backward)?

(19) Do you have any further comments?

Thank you!

English Version

Questionnaire 'Entertainment/ activities'

Enterprise information

(1) What is the name of the enterprise?

Name
Location

(2) Main contract person

Name ____________________

Address ____________________

Phone ____________________

Email ____________________

(3) What is the nature of your business?

- [ ] Transport
- [ ] Excursions
- [ ] Attractions
- [ ] Sport activities
- [ ] Other – please, specify: ____________

(4) What are your areas of operation?

- [ ] Canoeing
- [ ] Surfing
- [ ] Hiking/ trails
- [ ] Transfers
- [ ] Other – specify: ____________________
- [ ] Other – specify: ____________________
- [ ] Other – specify: ____________________
- [ ] Other – specify: ____________________

English Version

Emprego

(5) How many people are employeed in your business?

	Employees

(6) How many people are...?

	Employees	female	male
Managerial			
Skilled & semi-skilled			
Unskilled			
Total			

	Employees	...from the local community [within 30 km]	...external to the local community [from Bahia]	...from other states than Bahia [from Brazil]	...expatriats [international]
Managerial					
Skilled & semi-skilled					
Unskilled					
Total					

	Employees	Afro-Brazilian [Preto & pardo]	White-Brazilian [Branco]	Other
Managerial				
Skilled & semi-skilled				
Unskilled				
Total				

English Version

What are the average monthly salaries?

	Empregados/as	...from the local community [within 30 km]	...external to the local community [from Bahia]	...from other states than Bahia [from Brazil]	...expatriats [international]
Managerial					
Skilled & semi-skilled					
Unskilled					
Total					

Is there a difference related to origin?

☐ Yes

☐ No

If so, can you explain?

Employees	Afro-Brazilian [Preto & pardo]	White-Brazilian [Branco]	Other
Managerial				

	Employees	Afro-Brazilian [Preto & pardo]	White-Brazilian [Branco]	Other
Managerial				
Skilled & semi-skilled				
Unskilled				
Total				

Is there a difference related to ethnicity?

☐ Yes

☐ No

If so, can you explain?

(7) What are the dates of the low/high season?

[ ] low season

[ ] high season

(8) What is the typical staff turnover?

[ ] % per year

(9) What were your staff typically doing before they worked for you?

Skilled and semi-skilled

Unskilled

Your customers

(10) What proportion of your customers are...?

[ ] Business travellers

[ ] Holiday/ leisure travellers

[ ] Visiting friends and relatives

[ ] Other

(11) What proportion of your customers are from…?

[ ] the local areas [within 30 km]

[ ] Bahia

[ ] Brazil

[ ] Other countries

From which countries are they?

(12) How many people took tours with you over the past year (2016)?

[ ] People

Or complete the following table:

[ ] Low season (in %)

[ ] Low season (in %)

[ ] On average (in %)

(13) How many nights did each person stay for, on average?

[ ] Nights

(14) What is the revenue generated from guests (per person) in 2016?

	Typical revenue per traveller/ guest	Typical revenue per independent traveller [per guest/ day]	Typical revenue per package tourist [per guest/ day]
Low season			
High season			
Average			

<u>Sales and costs</u>

(15) What was your total revenue for 2016?

	Real

(16) Cost structure of operations (2016):

			% of good by value from:			
	Expendi-ture	% of total operating costs	local [30km]	domestic [Bahia]	domestic [Brasil]	inter-national
Staff						
Food & beverage						
Vehicles & maintenance						
Debt cost						
Other						
Total						

(17) What types and values of local linkages were spent in 2016?

Type	Value

Market access and markeing

(18) How do you market/advertise your business?

- ☐ Signposts
- ☐ Posters
- ☐ Flyers
- ☐ Internet - specify: ____________________
- ☐ Guide books - specify: ____________________
- ☐ Through local tourism enterprises
- ☐ Government
- ☐ Tour operators - specify: ____________________
- ☐ 'Word-of-mouth'
- ☐ Through local people
- ☐ Newspaper/ magazines - specify:____________________
- ☐ Tradeshows - specify: ____________________
- ☐ Other - explain: ____________________

Challenges and opportunities

(19) What are the problems associated with starting and operating a business in this area?

Internal Challenges: Those that occur within your business that you can influence

Challenge	**Yes/ No**	
Skills of staff		
Marketing/ advertising		
Lack of customers		
...		
...		

External Challenges: Those that occur outside your business; that have an effect on your business but cannot be influenced

Challenge	**Yes/ No**	
Land		
Tourist visa		
Infrastructure		
Country-level marketing		
Tourist perceptions		
...		
...		

(20) What is needed to grow your business?

(21) What is needed to increase procurement linkages with local suppliers and services?

(22) Do you have any further comments?

Thank you!

Appendix 4: Tourist questionnaire

Tourist questionnaire

(1) What is the name of the accommodation you are staying in Imbassaí?

(2) How are you travelling?

- [ ] Alone
- [ ] As a couple
- [ ] With family
- [ ] In a group
- [ ] Other ________________

(3) If you travelling with your family or in a group, how many people are travelling with you?

[ ] People

(4) What is your country of residence? If from Brazil, from which state are you?

Country of residence ____________________________

State in Brazil ____________________________

(5) What is your reason for travelling to Imbassaí?

- [ ] Visit family and friends
- [ ] Holiday
- [ ] Business
- [ ] Conference
- [ ] Other ________________

(6) Is this your first visit in Imbassaí?

- [ ] Yes
- [ ] No

(7) If this is not your first visit, how many times have you been in Imbassaí?

[ ] Times

Do you visit Imbassaí regularly?

☐ Yes

☐ No

If yes, what is your frequence of travelling?

☐ 3-4 times per month

☐ 2 times per month

☐ 1 time per month

☐ 4-5 times per year

☐ 6-11 times per year

☐ Other ____________

(8) How many nights do you stay in Imbassaí this time?

☐ Nights

(9) How much money do you spend approximately <u>during your stay</u> in Imbassaí?

The payments were made for:

☐ One person ☐ More persons ☐ persons

Flight (international)		BR$
Flight (national)		BR$
Airport transport		BR$
Local transport		BR$
Accommmodation		BR$
Food & drinks (at the beach)		BR$
Food & drinks (restaurant)		BR$
Food & drinks (supermarket)		BR$
Activities (e.g. canoeing, trips)		BR$
Shopping (formal shop)		BR$
Shopping (individual sellers)		BR$
Other		BR$

(10) Did you do any excursions?

☐ Yes

☐ No

If yes, which ones? And how much did they cost?

Excursion 1 ______________________ Price (BR$) ☐

Excursion 2 ______________________ Price (BR$) ☐

Excursion 3 ______________________ Price (BR$) ☐

(11) In general, in your opinion, the ideal holiday destination has....

	Not important	Moderately important	Important	Very important	No comment
Warm weather					
Business opportunities					
Activities for children					
Restaurants with international food					
Restaurants with local food					
Availability of fresh fruit and vegetables					
Tourist information point available					
Good tourist transportation					
Guided excursions to local attractions					
Shopping facilities					
Visits to local markets					
Visits to places where crafts are produced					
Experiencing local festivals and events					

Natural attractions (e.g. parks, wildlife)					
Cultural, historical and heritage attractions					
Purchasing 'fair trade' products					
Locally made furnishings in your hotel					
Nightlife					
Beaches					
Sport facilities					
Adventure activities					
Meeting local people					
Clean and hygienic place					
Safety and security					
Other					
Other					
Other					

(12) What is your profession?

☐ Student

☐ Employee

☐ Manager

☐ Retired

☐ Self-employed

☐ Other ____________

(13) What is your age?

☐ Years

(14) In your opinion, rate your experience in Imbassaí!

- [ ] Excellent
- [ ] Very good
- [ ] Medium
- [ ] No comment
- [ ] Poor
- [ ] Very bad
- [ ] Terrible

(15) Would you recommend the area (=Imbassaí) to your friends and your family?

- [ ] Yes
- [ ] No

(16) Would you recommend the area (=Imbassaí) to colleagues (when on business)?

- [ ] Yes
- [ ] No

(17) What could be done to make your trip to Imbassaí better?

Thank you very much!

Appendix 5: Research Ethics Documents - Part 1 (SHUREC1 + SHUREC2a)

Sheffield Hallam University

RESEARCH ETHICS CHECKLIST (SHUREC1)

This form is designed to help staff and postgraduate research students to complete an ethical scrutiny of proposed research. The SHU Research Ethics Policy should be consulted before completing the form.

Answering the questions below will help you decide whether your proposed research requires ethical review by a Faculty Research Ethics Committee (FREC). In cases of uncertainty, members of the FREC can be approached for advice.

Please note: staff based in University central departments should submit to the University Ethics Committee (SHUREC) for review and advice.

The final responsibility for ensuring that ethical research practices are followed rests with the supervisor for student research and with the principal investigator for staff research projects.

Note that students and staff are responsible for making suitable arrangements for keeping data secure and, if relevant, for keeping the identity of participants anonymous. They are also responsible for following SHU guidelines about data encryption and research data management.

The form also enables the University and Faculty to keep a record confirming that research conducted has been subjected to ethical scrutiny.

- For postgraduate research student projects, the form should be completed by the student and counter-signed by the supervisor, and kept as a record showing that ethical scrutiny has occurred. Students should retain a copy for inclusion in their thesis, and staff should keep a copy in the student file.
- For staff research, the form should be completed and kept by the principal investigator.

Please note if it may be necessary to conduct a health and safety risk assessment for the proposed research. Further information can be obtained from the Faculty Safety Co-ordinator.

General Details

Name of principal investigator or postgraduate research student	Theres Winter
SHU email address	t.winter@shu.ac.uk
Name of supervisor (if applicable)	Seonyoung Kim
email address	fomsk@exchange.shu.ac.uk
Title of proposed research	Poverty and Inequality in Brazil's Northeast - Exploring the Role of Tourism
Proposed start date	19th February 2017 (part 1)
Proposed end date	19th March 2017 (part 1)
Brief outline of research to include, rationale & aims (500 - 750 words).	In the globalised world, tourism has become one of the largest industries, creating 284 million jobs and generating 9.8 % of the world's GDP (WTTC, 2016). The potential of tourism to achieve economic development, overcome poverty and reduce

inequality has been acknowledged since the 1960s (Mowforth and Munt, 1998; Sharpley and Telfer, 2015). However, it remains largely unclear as to whether tourism actually can contribute to poverty reduction or, in fact, increases inequality at spatial or societal scale (Spenceley and Meyer, 2012).

This doctoral research aims to explore the role of tourism in reducing multidimensional poverty and inequality in Imbassaí (in the Northeast of Brazil) from a political economy perspective. In tourism research, studies on poverty reduction tend to focus on economic impacts, although the importance of taking a broader approach has been widely emphasised (e.g. Cracolici and Nijkamp, 2009; Croes, 2012; Hashimoto, 2002; Spenceley and Meyer, 2012). Inspired by Sen's (1973:1995a) capability approach, this doctoral research takes a multidimensional approach to poverty, in that it seeks to measure tourism-related income *(objective 1)*, analyse the value of income *(objective 2)* and evaluate further opportunities provided by tourism for poor people *(objective 3)*. Poverty and inequality are strongly interrelated; however, they have rarely been considered jointly in tourism research (e.g. Ashley et al., 2001). This doctoral research seeks to explore local people's perceptions of the distribution of tourism-related income, value of income and further opportunities in order to identify whether tourism privileges or disadvantages certain groups of the society *(objective 4)*.

Furthermore, studies that focus on measuring the economic impact of tourism are rarely connected with broader theoretical discussions in order to develop understanding of the underlying reasons for the 'measured' impacts (Meyer, 2009). Adopting a political economy perspective, this doctoral research seeks to investigate internal power relations at destination level (objective 5), that have been frequently overlooked in tourism research. The existing tourism studies focus on the unequal relationship between the Northern-based large-scale tourism industry and southern destinations (Lacher and Nepal, 2010) and treat power as an underlying theme rather than sufficiently conceptualising it (Church and Coles, 2007; Mosedale, 2011). This research will utilise Giddens' (1979, 1984) structuration theory to examine internal power relations in Imbassaí *(objective 5)*. It has received limited attention in tourism research, although its potential value has been emphasised (e.g. Bramwell, 2007; Erskine and Meyer, 2012).

To achieve the aim and objectives of this study, a mixed-methods approach will be utilised within a critical paradigm. A combination of between-methods and within-methods triangulation will be applied, in that a quantitative and a qualitative approach will be utilised. The application of between-methods triangulation is crucial when utilising Sen's approach to multidimensional poverty since a quantitative approach is

	required to measure the impact of tourism on income for poor people and a qualitative approach is needed to undertake an in-depth evaluation of people's perceptions of opportunities provided by tourism. This research will utilise quantitative pro-poor value chain analysis (VCA) and qualitative ethnographic research that comprises participant observation, in-depth interviews and 'net-map'. The research will be carried out sequentially since information gathered during the quantitative research is essential for designing and conducting the qualitative approach.
Where data is collected from human participants, outline the nature of the data, details of anonymisation, storage and disposal procedures if these are required (300 -750 words).	The data will be collected in Imbassaí - a coastal tourist destination in Bahia in the Northeast of Brazil. The researcher has visited her family friends in the destination many times and is familiar with the location. The first part of the study (19^{th} February – 19^{th} March 2017) seeks to conduct pro-poor value chain analysis using the standard framework that has been developed, tested and suggested by practitioners (cp. Ashley, Mitchell and Spenceley, 2009). Using a standard framework is beneficial, in that the design of the methodology underwent rigorous scrutiny without ethical problems and dilemmas being identified (ibid.). The researcher seeks to collect data on revenue flows and pro-poor income. To do so, a questionnaire survey will be conducted with direct tourism service providers (e.g. hotel managers) and secondary suppliers (e.g. craft makers). The research will utilise standard questionnaires and follow the associated guidelines to conduct the survey. The gathered data will encompass characteristics of the service provider (e.g. owner, number of employees, facilities), financials (e.g. rates charged, occupancy, payments to staff and suppliers), further information about suppliers and customers (e.g. market segments). The researcher will contact the potential research participants in advance and arrange meetings before travelling to the destination. The researcher will clearly explain the aim of the research and provide the participant information sheet and ask for the participants' consent. Questionnaire-based interviews will last approximately 60 min and take place at the workplace of the service provider/ supplier during working hours *(see: Risk Assessment).* Following the standard VCA-framework, a tourist survey will be carried out. The aim of the survey is to gather information about tourists (e.g. nationality, length of stay, purpose of travel) and about expenditure in the destination (Ashley, Mitchell and Spenceley, 2009). Names and background information of research participants will not be collected (ibid.).The standard questionnaires will be conducted using an interviewer-

	administered face-to-face approach. The tourist survey will be conducted in the centre of the town – where people need to pass by in order to go to the beach; each questionnaire will take approximately 10 min *(see: Risk Assessment*). Secure storage of gathered data, documentation and metadata is paramount in order to maintain confidentiality and anonymity of data. A data management plan (DMP) has been developed *(see: DMP)*.
Will the research be conducted with partners & subcontractors?	**No** (If **YES**, outline how you will ensure that their ethical policies are consistent with university policy.)

1. Health Related Research involving the NHS or Social Care / Community Care or the Criminal Justice System or with research participants unable to provide informed consent

	Question	**Yes/No**
1.	Does the research involve?	
	• Patients recruited because of their past or present use of the NHS or Social Care	No
	• Relatives/carers of patients recruited because of their past or present use of the NHS or Social Care	No
	• Access to data, organs or other bodily material of past or present NHS patients	No
	• Foetal material and IVF involving NHS patients • The recently dead in NHS premises	No
	• Prisoners or others within the criminal justice system recruited for health-related research*	No
	• Police, court officials, prisoners or others within the criminal justice system*	No
	• Participants who are unable to provide informed consent due to their incapacity even if the project is not health related	No
2.	Is this a research project as opposed to service evaluation or audit? *For NHS definitions please see the following website* http://www.nres.nhs.uk/applications/is-your-project-research/	No

If you have answered **YES** to questions **1 & 2** then you **must** seek the appropriate external approvals from the NHS, Social Care or the National Offender Management Service (NOMS) under their independent Research Governance schemes. Further information is provided below.

NHS https://www.myresearchproject.org.uk/Signin.aspx

* Prison projects may also need National Offender Management Service (NOMS) Approval and Governor's Approval and may need Ministry of Justice approval. Further guidance at: http://www.hra.nhs.uk/research-community/applying-for-approvals/national-offender-management-service-noms/

NB FRECs provide Independent Scientific Review for NHS or SC research and initial scrutiny for ethics applications as required for university sponsorship of the research. Applicants can use the NHS proforma and submit this initially to their FREC.

2. Research with Human Participants

Question		Yes/No
1.	Does the research involve human participants? This includes surveys, questionnaires, observing behaviour etc. *Note* *If YES, then please answer questions 2 to 10* *If NO, please go to Section 3*	Yes
2.	Will any of the participants be vulnerable? *Note* *'Vulnerable' people include children and young people, people with learning disabilities, people who may be limited by age or sickness or disability, etc. See definition*	No
3	Are drugs, placebos or other substances (e.g. food substances, vitamins) to be administered to the study participants or will the study involve invasive, intrusive or potentially harmful procedures of any kind?	No
4	Will tissue samples (including blood) be obtained from participants?	No
5	Is pain or more than mild discomfort likely to result from the study?	No
6	Will the study involve prolonged or repetitive testing?	No
7	Is there any reasonable and foreseeable risk of physical or emotional harm to any of the participants? *Note* *Harm may be caused by distressing or intrusive interview questions, uncomfortable procedures involving the participant, invasion of privacy, topics relating to highly personal information, topics relating to illegal activity, etc.*	No
8	Will anyone be taking part without giving their informed consent?	No
9	Is it covert research? *Note* *'Covert research' refers to research that is conducted without the knowledge of participants.*	No
10	Will the research output allow identification of any individual who has not given their express consent to be identified?	No

If you answered **YES only** to question **1,** you must complete the box below and submit the signed form to the FREC for registration and scrutiny.

Data Handling
See: Data Management Plan

If you have answered **YES** to any of the other questions you are **required** to submit a SHUREC2A (or 2B) to the FREC. If you answered **YES** to question **8** and participants cannot provide informed consent due to their incapacity you must obtain the appropriate approvals from the NHS research governance system.

3. Research in Organisations

Question		Yes/No
1	Will the research involve working with/within an organisation (e.g. school, business, charity, museum, government department, international agency, etc.)?	No
2	If you answered YES to question 1, do you have granted access to conduct the research? *If YES, students please show evidence to your supervisor. PI should retain safely.*	
3	If you answered NO to question 2, is it because: A. you have not yet asked B. you have asked and not yet received an answer C. you have asked and been refused access.	
Note	*You will only be able to start the research when you have been granted access.*	

4. Research with Products and Artefacts

Question		Yes/No
1.	Will the research involve working with copyrighted documents, films, broadcasts, photographs, artworks, designs, products, programmes, databases, networks, processes, existing datasets or secure data?	No
2.	If you answered YES to question 1, are the materials you intend to use in the public domain?	
Notes	*'In the public domain' does not mean the same thing as 'publicly accessible'.* – *Information which is 'in the public domain' is no longer protected by copyright (i.e. copyright has either expired or been waived) and can be used without permission.* – *Information which is 'publicly accessible' (e.g. TV broadcasts, websites, artworks, newspapers) is available for anyone to consult/view. It is still protected by copyright even if there is no copyright notice. In UK law, copyright protection is automatic and does not require a copyright statement, although it is always good practice to provide one. It is necessary to check the terms and conditions of use to find out exactly how the material may be reused etc.* *If you answered YES to question 1, be aware that you may need to consider other ethics codes. For example, when conducting Internet research, consult the code of the Association of Internet Researchers; for educational research, consult the Code of Ethics of the British Educational Research Association.*	
3.	If you answered NO to question 2, do you have explicit permission to use these materials as data? *If YES, please show evidence to your supervisor. PI should retain permission.*	

4.	If you answered NO to question 3, is it because: A. you have not yet asked permission B. you have asked and not yet received and answer C. you have asked and been refused access.	**A/B/C**
Note	*You will only be able to start the research when you have been granted permission to use the specified material.*	

Adherence to SHU policy and procedures

Personal statement	
I can confirm that: – I have read the Sheffield Hallam University Research Ethics Policy and Procedures – I agree to abide by its principles.	
Student / Researcher/ Principal Investigator (as applicable)	
Name: Theres Winter	Date: 8/9/16
Signature: T. Winter	
Supervisor or other person giving ethical sign-off	
I can confirm that completion of this form has not identified the need for ethical approval by the FREC or an NHS, Social Care or other external REC. The research will not commence until any approvals required under Sections 3 & 4 have been received.	
Name: NICOLA PALMER	Date: 8/9/16
Signature: N.J. Palmer	
Additional Signature if required:	
Name: SEONYOUNG KIM	Date: 8/9/16
Signature:	

Please ensure the following are included with this form if applicable, tick box to indicate:

	Yes	No	N/A
Research proposal if prepared previously	x☐	☐	☐
Any recruitment materials (e.g. posters, letters, etc.)	☐	☐	☐
Participant information sheet (for Part 1 of the research)	x☐	☐	☐
Participant consent form (for Part 1 of the research)	x☐	☐	☐
Details of measures to be used (e.g. questionnaires, etc.)	x☐	☐	☐
Outline interview schedule / focus group schedule	☐	☐	☐
Debriefing materials	☐	☐	☐
Health and Safety Project Safety Plan for Procedures Risk Assessment	x☐	☐	☐
Data Management Plan*	x☐	☐	

If you have not already done so, please send a copy of your Data management Plan to rdm@shu.ac.uk

Sheffield Hallam University

APPLICATION FOR RESEARCH ETHICS APPROVAL (SHUREC2A)

SECTION A: Research Protocol

Important Note - If you have already written a research proposal (e.g. for a funder) that answers the methodology questions in this section please include a copy of the proposal and leave those questions blank. You **MUST** however complete **ALL** of Section B and C (risk assessment).

1. Name of principal investigator: Theres Winter

Faculty: SBS

Email address: t.winter@shu.ac.uk

2. Title of research: Poverty and Inequality in Brazil's Northeast - Exploring the Role of Tourism (RESEARCH PART 2)

3. Supervisor (if applicable)**: Dr Seonyoung Kim, Dr Nicola Palmer**

Email address: fomsk@exchange.shu.ac.uk

4. CONVERIS number (applicable for externally funded research):

5. Other investigators (within or outside SHU)

Title	Name	Post	Division	Organisation

6. Proposed duration of project

Start date: 19/06/17 **End Date: 30/08/17**

7. Location of research if outside SHU: Imbassai, Bahia, Northeast Brazil

8. Main purpose of research:

- x Educational qualification
- ☐ Publicly funded research
- ☐ Staff research project
- ☐ Other (Please supply details)

9. Background to the study and scientific rationale (500- 750 words approx.)

In the globalised world, tourism has become one of the largest industries, creating 284 million jobs and generating 9.8 % of the world's GDP (WTTC, 2016). The potential of tourism to achieve economic development, overcome poverty and reduce inequality has been acknowledged since the 1960s (Mowforth and Munt, 1998; Sharpley and Telfer, 2015). However, it remains largely unclear as to whether tourism actually can contribute to poverty reduction or, in fact, increases inequality at spatial or societal scale (Spenceley and Meyer, 2012).

This doctoral research aims to explore the role of tourism in reducing multidimensional poverty and inequality in Imbassaí (in the Northeast of Brazil) from a political economy perspective. In tourism research, studies on poverty reduction tend to focus on economic impacts, although the importance of taking a broader approach has been widely emphasised (e.g. Cracolici and Nijkamp, 2009; Croes, 2012; Hashimoto, 2002; Spenceley and Meyer, 2012). Inspired by Sen's (1973:1995a) capability approach, this doctoral research takes a multidimensional approach to poverty, in that it seeks to measure tourism-related income *(objective 1)*, analyse the value of income *(objective 2)* and evaluate further opportunities provided by tourism *(objective 3)*. Poverty and inequality are strongly interrelated; however, they have rarely been considered jointly in tourism research (e.g. Ashley et al., 2001). This doctoral research seeks to explore local people's perceptions of the distribution of tourism-related income, value of income and further opportunities in order to identify whether tourism privileges or disadvantages certain groups of the society *(objective 4)*.

Furthermore, studies that focus on measuring the economic impact of tourism are rarely connected with broader theoretical discussions in order to develop understanding of the underlying reasons for the 'measured' impacts (Meyer, 2009). Adopting a political economy perspective, this doctoral research seeks to investigate internal power relations at destination level *(objective 5)*, that have been frequently overlooked in tourism research. The existing tourism studies focus on the unequal relationship between the Northern-based large-scale tourism industry and southern destinations (Lacher and Nepal, 2010) and treat power as an underlying theme rather than sufficiently conceptualising it (Church and Coles, 2007; Mosedale, 2011). This research will utilise Giddens' (1979, 1984) structuration theory to examine internal power relations in Imbassaí. It has received limited attention in tourism research, although its potential value has been emphasised (e.g. Bramwell, 2007; Erskine and Meyer, 2012).

To achieve the aim and objectives of this study, a between-method triangulation is employed, which is crucial, when utilising Sen's approach to multidimensional poverty. A quantitative approach is required to measure the impact of tourism on income for poor people and a qualitative approach is needed to undertake an in-depth evaluation of people's perceptions of opportunities provided by tourism.

This research utilises quantitative pro-poor value chain analysis (VCA) and qualitative photo-elicitation. The research is carried out sequentially, in that experiences and results gathered during the quantitative research (part 1) are utilised to plan and design the qualitative study (part 2) of undertaking an in-depth analysis of the role of tourism in reducing multidimensional poverty and inequality, and power relations.

10. Has the scientific / scholarly basis of this research been approved? (For example by Research Degrees Subcommittee or an external funding body)

x Yes
☐ No - to be submitted
☐ Currently undergoing an approval process
☐ Irrelevant (e.g. there is no relevant committee governing this work)

11. Main research questions

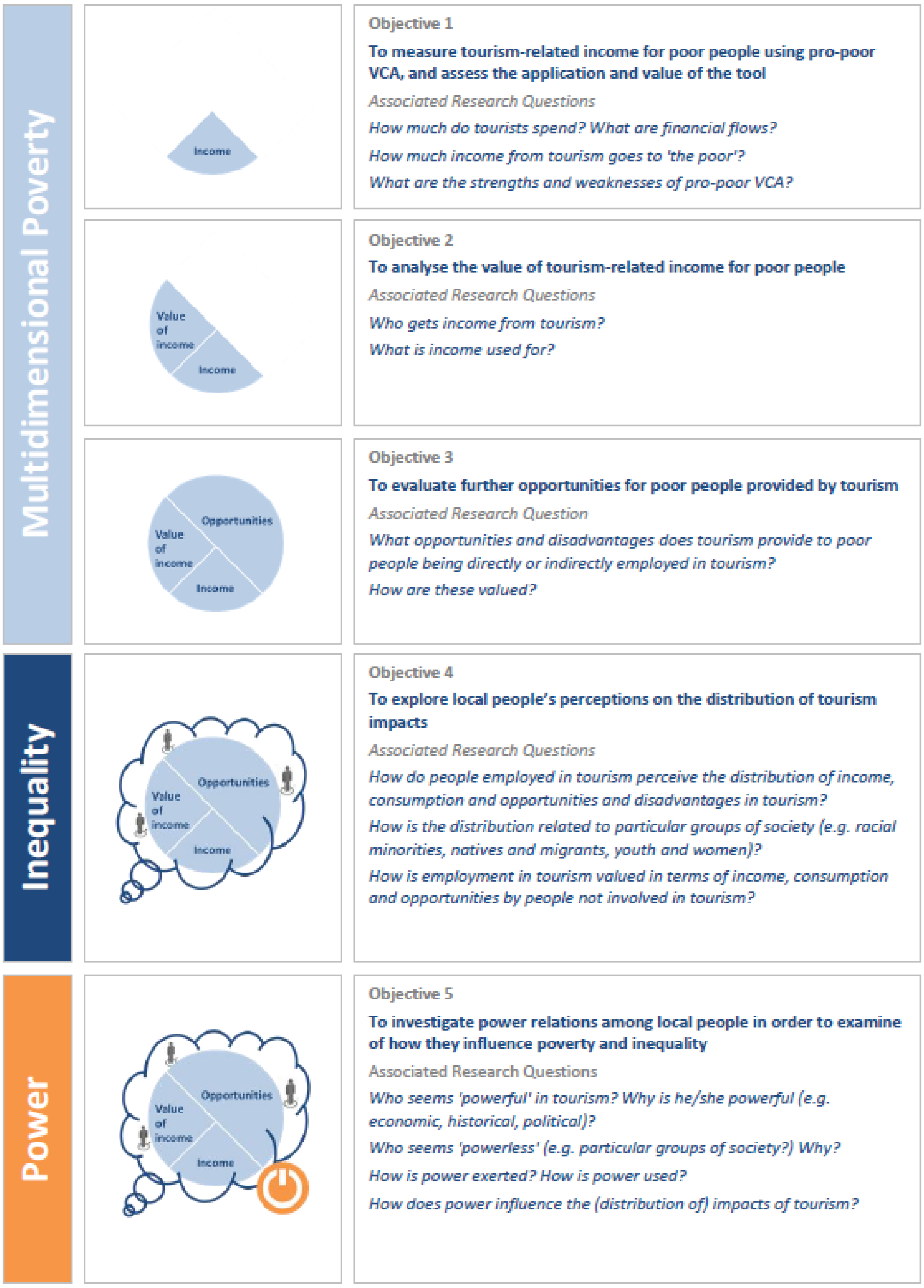

Figure 1: Research objectives & questions

12. Summary of methods including proposed data analyses

At this stage, quantitative pro-poor value chain analysis (VCA) (part 1) was conducted from 19th February – 19th March 2017 in Imbassaí, a coastal tourist destination in Bahia in the Northeast of Brazil. Ethics approval was given on 17th February 2017 *(see: SBS-179)*.

The researcher seeks to apply for approval for undertaking the qualitative study (part 2) that utilises the method of photo-elicitation.

To conduct a photo-elicitation project, Rose (2016) and Guillemin and Drew (2010) suggest six stages *(see: Figure 2)*.

Stage		Activity	
I	Planning the practicalities	a	Determine the sample and sample size
		b	Organise cameras
		c	Plan 'initial briefing' and 'interviews' (e.g. location, length)
		d	Plan analysis of interviews and photos
		e	Consider 'ethics'
II	Carrying out the 'initial briefing'	f	Explain research aim and process (supported by information-sheet)
		g	Ask for consent i.e. signature on consent form
III	Printing the photos	h	Develop the photos
		j	Return the photos
IV	Conducting the interview	k	Explore meaning of the photos taken by the participant
		l	Discuss further themes according to interview guidelines
V	Analysing the interview and photographs	m	Transcribe interviews
		n	Apply 'thematic coding' analysis to transcripts and photographs
VI	Presenting the results	o	Decide on how photos will be used (considering anonymity of participants, copyrigh

Preparation	*Data Collection*	*Data Analysis*

Figure 2: Photo-elicitation, Six stages
Source: Adapted from Rose (2016) and Guillemin and Drew (2010)

Activities a – e will be carried out in preparation for the fieldwork. The process of collecting data in the research location starts with the 'initial briefing' *(see: Stage II.)* and lasts until all in-depth interviews with participants are carried out *(see: Stage IV.)*. Whilst conducting the interviews, the researcher seeks to continuously transcribe the recorded interviews *(see: Activity m.)*, which helps the researcher to engage with the collected information (Kvale, 2009) and undertake an initial analysis (Rapley, 2007). Data analysis and presentation *(see: Activity n. and o.)* will be carried out, when the researcher returns from the fieldwork.

In the following, **Stage 1: Planning the practicalities** will be discussed in-depth:

Activity 1a: Determine the sample and sample size

(see: SECTION B. 1. Describe the arrangements for selecting/sampling and briefing potential participants)

Activity 1b: Organise cameras
The researcher seeks to organise disposable cameras (per camera £5) for all participants - although some participants might have their own. This is done for two reasons: firstly, all participants should have the same equipment to participate in this project, especially when considering the context of 'inequality' in this study. Secondly, participants should *"reflect on everyday activities in a way that is not usually done"* (Rose, 2016:316) – since some people might take pictures with their phone daily, a different than the usual tool is needed. Photos can be developed in Bahia's main capital Salvador, which 60km from the research location.

Activity 1c: Plan 'initial briefing' and 'interviews'
To start the photo-elicitation process, an 'initial briefing' will be carried out with each research participant at the workplace. During the initial briefing, the researcher will explain the research aims and the process including ethical implications, ask for consent, and provide the camera and, if required, show how it works (Guillemin and Drew, 2010). *(see: details in terms of ethical implications in Activity 1e: Consider ethics)*

Since the researcher does not seek to lead or influence participants, they will be given this broad question in terms of what they should take photos: 'how does tourism influence your everyday life?'. This broad approach has been commonly applied in photo-elicitation studies (e.g. Brickell, 2012; Clark-Ibanez, 2007; Hodgetts et al., 2007a). After a period of 2.5 weeks, the researcher will collect the cameras from each participant and develop the photos. Once pictures are developed, they will be returned to the participant, without looking at them, so that participants can remove the ones they do not want to discuss (Clark-Ibanez, 2007). When returning the photos, an interview will be scheduled with each participant.

In-depth interviews will last between 45 and 75 minutes – which was, for example, found to be a suitable time-frame in Loeffler's (2004) study exploring meaning of adventure tourism experiences. The interviews will be recorded and notes will be taken (Rose, 2016). Clark-Ibanez (2007) suggests numbering the photos, so that during the interview, reference can be made to the specific photos, which helps combining transcripts of interviews and photos for analysing the data. Using a semi-structured approach, the researcher will cover three parts *(see: Interview guideline)* to explore how tourism influences people's lives. After relating the discussion to photos that were taken (part 1) and that could not be taken (part 2), part 3 offers the opportunity to approach topics more specifically– in case they have not been addressed in part 2 and 3.

At first, participants will be asked to choose five photos from their selection, which are 'most important' to them, to conduct an in-depth discussion in the limited time-frame; if there will be the opportunity, further photos will be considered at a later stage. To start the discussion, broad questions such as 'what does this photo show?' and 'why did you take it?' will be utilised by the researcher. The emerging topics will be pursued and developed by the researcher to explore the meaning of the photo in context of the research question 'how does tourism influence your everyday life?'.

Activity 1d: Plan analysis of interviews and photos
Once the interviews are transcribed, the transcripts and photos will be analysed using both as one set of data, which is a frequently applied approach by researchers (Rose, 2016). Guillemin and Drew (2010:184) believe that *"images and interview data are seen as inextricably linked, requiring simultaneous and not separate analysis"*.

To analyse the data, the researcher will apply 'thematic coding analysis' (Robson, 2011). Braun and Clarke (2006) point out that thematic coding is suitable for analysing complex data that is gathered in participatory research, which relates to this photo-elicitation study. NVivo was chosen as a tool to analyse the qualitative data. (*see: details in terms of confidentiality and anonymity in Activity 1e: Consider ethics)*

Activity 1e: Consider 'ethics'

For every research project, the ethical implications must be considered (Clark, 2012). It is important to acknowledge that these might arise at different stages of the research process (Saunders et al., 2012). According to the Economic and Social Research Council (ESRC, 2015:8, 10) using 'visual methods' involves *"more than a minimal risk"* that ethics guidelines might be breached, in a way that the principle of anonymity is not respected i.e. *"participants or other individuals may be identifiable in the material"*. Wiles et al. (2011) suggest considering specifically 'anonymity and consent' and 'law and copyright'.

(1) Anonymity and consent

The researcher will conduct the photo-elicitation project overtly by introducing herself as a researcher, explaining the research aim and objectives to participants, and asking for consent (Zikmund, 2009). Participants of the photo-elicitation will receive an information sheet *(see: Appendix 2)* and will be asked to sign a form that ensures that they give consent to participate in this study, to use the information provided and photographs taken, once anonymised , for research outputs *(see: Appendix 3)*. Real names will not be used to protect the identity of participants, and through the use of computer software, photographs will be anonymised with the pixelation of any personal identifiers. In case participants are illiterate, the documents (information sheet and consent form) will be read out to them.

Confidentiality and anonymity are paramount for the researcher – to ensure both for storing, analysing and presenting the data, a Data-Management-Plan (DMP) was developed and sent to Paul Ashwell and Eddy Verbaan *(see: Appendix 5)*

(2) Law and copyright

In visual research, it is important to consider copyright i.e. ownership of a specific visual image. In general, a person who took the image is the owner (Rose, 2016). Accordingly, since in this project photos are taken by research participants, they are the copyright owners. Thus, the researcher will need to ask for consent of participants to reuse the photos in publications and presentations (Barker and Smith, 2012). Reviewing ethical issues in visual research, the National Centre for Research Methods (NCRM, 2008:18) confirms that *"copyright can be managed relatively easy with negotiation with the research participant and, with their agreement, signing of a consent form".* The designed consent form addresses the reproduction of participant-generated images *(see: Appendix 3).*

While it is manageable to seek consent from all research participants, it is a more complex issue to receive consent of people, who are potentially shown on images (NCRM, 2008). The researcher will brief participants that, when people can be identified on photos, they need to explain the purpose of taking the photos and ask for consent (NCRM, 2008). Participants will be asked to provide confirmation in the consent form *(see: Appendix 3).*

SECTION B

1. Describe the arrangements for selecting/sampling and briefing potential participants. This should include copies of any advertisements for volunteers, letters to individuals/organisations inviting participation and participant information sheets. The sample sizes with power calculations if appropriate should be included.

As a result of conducting quantitative pro-poor VCA (part 1), (income-) poor and low-income as well as high-income individuals, who are integrated in the local tourism value chain, were identified as potential participants for part 2 that utilises the method of photo-elicitation. The researcher will approach these individuals at the beginning of the second field visit and ask for interest in participating in the study. A 'participant information sheet' was designed and will be given to potential participants *(see: Appendix 2)*.

If individuals agree to participate, an initial briefing will be carried out with each research participant at the workplace. During the initial briefing, the researcher will explain the research aims and the process including ethical implications, ask for consent, and provide the camera and, if required, show how it works (Guillemin and Drew, 2010). Participants will be asked to sign a 'consent form' *(see: Appendix 3).*

Photo-elicitation projects vary in terms of their size as Rose (2016:319) emphasises that they can be *“quite small and focus on a limited number of participants, or be quite large”* depending on numerous factors. Garrod (2008:397) points out that *“given the task-based nature of the method and the considerable commitment required of the volunteers, achieving a reasonably representative sample will likely always be a challenge”*. Considering cost and time constraints, a sample of twenty participants is the maximum possible – which is also supported by Brickell’s study (2012). Crouch and McKenzie (2006:483) advocate a sample of up to twenty participants since it enables *"the researcher's close association with the respondents, and enhance the validity of fine-grained, in-depth inquiry"*. A sample of twenty participants resembles well with part 2 of this study that seeks to undertake an in-depth analysis of the role of tourism in reducing multidimensional poverty and inequality, and power relations.

2. What is the potential for participants to benefit from participation in the research?

By participating in the photo-elicitation project, participants will receive the photographs they took to show how tourism influences their lives. Every participant can decide individually on how to use these photos; however, there is the potential of organising an exhibition in the town centre (led by the community) - that can be used as a tool for creating awareness among stakeholders (administration, tourists, etc.).

Furthermore, findings of this research can be used to identify and design intervention strategies (that are broader than simply focussing on economic impacts) in order to improve the benefits of tourism on the community.

3. Describe any possible negative consequences of participation in the research along with the ways in which these consequences will be limited.

Participants will be tasked to take photos of their every-day life; as a result private and personal information of the participant might be disclosed, that can cause emotional reactions when discussing the photos. To avoid this risk, photos will be returned to participants, without looking at them, so that participants can remove the ones they do not want to discuss. In the unlikely event that participants get upset during an interview, the researcher will ask the interviewee on how he/ she would like to go ahead (e.g. have a break, continue at a different time, withdraw).

To avoid that people, who did not provide permission, are shown on images participants take, participants will be briefed that they need to explain the purpose of taking the photos and ask for consent (NCRM, 2008). Participants will be asked to provide confirmation that they do so in the consent form *(see: Appendix 3).* Furthermore, through the use of computer software, photographs will be anonymised with the pixelation of any personal identifiers.

4. Describe the arrangements for obtaining participants' consent. This should include copies of the information that they will receive & written consent forms where appropriate. If children or young people are to be participants in the study details of the arrangements for obtaining consent from parents or those acting in *loco parentis* or as advocates should be provided.

The researcher will conduct the photo-elicitation project overtly by introducing herself as a researcher, explaining the research aim and objectives to participants, and asking for consent (Zikmund, 2009). Participants of the photo-elicitation will receive an information sheet *(see: Appendix 2)* and will be asked to sign a form that ensures that they give consent to participate in this study, to use the information provided and photographs taken, once anonymised , for research outputs *(see: Appendix 3)*. Real names will not be used to protect the identity of participants, and through the use of computer software, photographs will be anonymised with the pixelation of any personal identifiers. In case participants are illiterate, the documents (information sheet and consent form) will be read out to them.

While it is manageable to seek consent from all research participants, it is a more complex issue to receive consent of people, who are potentially shown on images (NCRM, 2008). The researcher will brief participants that, when people can be identified on photos, they need to explain the purpose of taking the photos and ask for consent (NCRM, 2008). Participants will be asked to provide confirmation in the consent form *(see: Appendix 3).*

5. **Describe how participants will be made aware of their right to withdraw from the research.** This should also include information about participants' right to withhold information and a reasonable time span for withdrawal should be specified.

The 'participant consent form' refers to the participant's right to withdraw from the research.

Participants are given sufficient time to read the information carefully and to decide whether they want to participate.

Furthermore, participants will have the researcher's contact details, so that they can get in touch anytime, if they want to withdraw from the research.

6. **If your project requires that you work with vulnerable participants describe how you will implement safeguarding procedures during data collection.**

The project does not require working with vulnerable participants directly.

However, a participant-generated image could capture a child. Asking for consent (in this case from a child's guardian/parent) and anonymising photos through pixelating any personal identifiers will be implemented as safeguarding procedures during data collection.

7. **If Disclosure and Barring Service (DBS) checks are required, please supply details**

n/a

8. **Describe the arrangements for debriefing the participants.** This should include copies of the information that participants will receive where appropriate.

Participants will receive an information sheet that contains the researcher's contact details, if they require further information.

9. **Describe the arrangements for ensuring participant confidentiality.** This should include details of:
    - how data will be stored to ensure compliance with data protection legislation
    - how results will be presented
    - exceptional circumstances where confidentiality may not be preserved
    - how and when confidential data will be disposed of

see: Data Management Plan (Appendix 5)

10. **Are there any conflicts of interest in you undertaking this research?** (E.g. are you undertaking research on work colleagues or in an organisation where you are a consultant?) Please supply details of how this will be addressed.

n/a

11. **What are the expected outcomes, impacts and benefits of the research?**

Applying the qualitative method of 'photo-elicitation' lends it itself well to achieve the aim of the study. It contributes, particularly, to balancing power differentials between the researcher and the research participant, to ensure that the knowledge about the study's topic 'multidimensional poverty, inequality, and power in a tourism context' is acquired from the perspectives of local people.

Applying a visual methodology – photo-elicitation – in tourism research also allows the researcher to contribute to methodological development in this field of study.

12. **Please give details of any plans for dissemination of the results of the research. This includes your plans for preserving and sharing your data. You may refer to your attached Data Management Plan.**

see: Data Management Plan (Appendix 5)

SECTION C

HEALTH AND SAFETY RISK ASSESSMENT FOR THE RESEARCHER

1. Will the proposed data collection take place on campus?

☐ Yes (Please answer questions 4, 6 and 7)
x No (Please complete all questions)

2. Where will the data collection take place?
(Tick as many as apply if data collection will take place in multiple venues)

	Location	**Please specify**
☐	Researcher's Residence	
☐	Participant's Residence	
☐	Education Establishment	
☐	Other e.g. business/voluntary organisation, public venue	
x	Outside UK	**Imbassai, Bahia, Northeast Brazil**

3. How will you travel to and from the data collection venue?

☐ On foot x By car ☐ Public Transport
x Other (Please specify) **Airplane**

Please outline how you will ensure your personal safety when travelling to and from the data collection venue

The travel involves separate parts

1) To airport (by bus)

2) Flight to Salvador (by airplane / TAP)

4) Salvador to Imbassai (by car / friend)

I undertook the travel several times, so that the travel is not a new experience for me. To further ensure personal safety, the following measures will be taken:

- I will take a phone with me, so that I can contact someone (e.g. my family, supervisors) at any time; I will take care that the phone is charged and has credit; so far, I did not have issues in terms of phone signal
- My family will be informed about every part of the travel (incl. times)
- I will be picked up from the airport in Salvador from a friend of my family

4. How will you ensure your own personal safety whilst at the research venue?

In the location, I will stay with a friend of my family. Therefore, I won't stay on my own. My family has my and the friend's contact details, so that they can always get in touch with me. I will always take a phone with me to ensure that I can contact somebody (if needed). My family and local contact have my DoS' phone number; so that they can inform the university should any incident occur.

I am aware of the SHU policy for 'Personal Safety and Lone Working'; in particular, appendices A and B. The suggested guidelines will be followed.

I will also periodically contact my DoS to confirm that the safety measures are effective.

5. If you are carrying out research off-campus, you must ensure that each time you go out to collect data you ensure that someone you trust knows where you are going (without breaching the confidentiality of your participants), how you are getting there (preferably including your travel route), when you expect to get back, and what to do should you not return at the specified time. (See Lone Working Guidelines). Please outline here the procedure you propose using to do this.

Semi-structured interviews will be conducted face-to-face with research participants during day-time - at their workplace. The workplace is located in the town centre; thus, easily accessible. I will inform my local contact about the venue and timing, and will give him a call after each interview.

During my stay in the research location (Imbassai), three half-day trips to Salvador (60km from Imbassai) are necessary to develop photos (as part of the methodology). I intend to go to Salvador with a friend, who is familiar with the surroundings.

6. Are there any potential risks to your health and wellbeing associated with either (a) the venue where the research will take place and/or (b) the research topic itself?

☐ None that I am aware of

x Yes (Please outline below including steps taken to minimise risk)

Crime and violence (see: Foreign Travel Advice Brazil, https://www.gov.uk/foreign-travel-advice/brazil) Crime and violence are high in major cities (Rio de Janeiro, São Paulo, Salvador) during the festive season and Carnival periods	Imbassaí (the research location) has a low crime rate. Having travelled there six times, I did never experience any crime and violence. I will avoid carrying valuables and avoid leaving my belongings unattended in public.
Protests (see: Foreign Travel Advice Brazil, https://www.gov.uk/foreign-travel-advice/brazil) Protests take place regularly, often without warning, in a number of Brazilian cities, including Rio de Janeiro, São Paulo, Recife, Brasilia and Belo Horizonte. There is a particularly high risk of demonstrations due to the current political situation.	However, it is very unlikely that protests will take place in the research location
ZIKA-Virus (see: Foreign Travel Advice Brazil, https://www.gov.uk/foreign-travel-advice/brazil) Brazil is considered to have current active ZIKV transmission. Increasing or widespread transmission has been reported. Most people infected with ZIKV have no symptoms. When symptoms do occur they are usually mild and short-lived.	Based on a growing body of research, there is now scientific consensus that Zika virus is a cause of microcephaly and other congenital anomalies. Pregnant women are advised to postpone non-essential travel until after pregnancy. There is no vaccination or medication to prevent ZIKV infection; steps will be taken to avoid being bitten by mosquitoes
Dengue fever (see: Foreign Travel Advice Brazil, https://www.gov.uk/foreign-travel-advice/brazil) The number of dengue fever cases in Brazil as a whole has increased considerably in 2015, especially in the south-east and central-west.	There is no vaccination or medication to prevent dengue; however, since research will be carried out in the Northeast, it does not pose a major risk. Nonetheless, steps will be taken to avoid being bitten by mosquitoes

7. **Does this research project require a health and safety risk analysis for the procedures to be used?**

x Yes - was completed and signed off by Graham Jarman
☐ No

(If **YES** the completed Health and Safety Project Safety Plan for Procedures should be attached)

Adherence to SHU policy and procedures

Personal statement	
I confirm that: • this research will conform to the principles outlined in the Sheffield Hallam University Research Ethics policy • this application is accurate to the best of my knowledge	
Principal Investigator	
Signature	Theres Winter
Date	13/06/17
Supervisor (if applicable)	
Signature	Seonyoung Kim
Date	14/6/17
Other signature	
Signature	
Date	

Please ensure the following are included with this form if applicable, tick box to indicate:

	Yes	**No**	**N/A**
Research proposal if prepared previously	☐	x	☐
Any recruitment materials (e.g. posters, letters, etc.)	☐	☐	x
Participant information sheet *(part 2)*	x	☐	☐
Participant consent form *(part 2)*	x	☐	☐
Details of measures to be used *(part 2 - interview guideline)*	x	☐	☐
Outline interview schedule / focus group schedule	☐	x	☐
Debriefing materials	☐	☐	x
Health and Safety Project Safety Plan for Procedures *(part 2)*	x	☐	☐
Data Management Plan*	x	☐	☐

If you have not already done so, please send a copy of your Data management Plan to rdm@shu.ac.uk
It will be used to tailor support and make sure enough data storage will be available for your data.

Appendix 6: Information Sheet - Part 1

Sheffield Hallam University

English Version

PARTICIPANT INFORMATION SHEET

TITLE OF RESEARCH:

Impacts of Tourism on a Local Economy in Brazil's Northeast

My name is Theres Winter and I am Doctoral Researcher at Sheffield Hallam University (UK). I would like to invite you to take part in my research about the impacts of tourism on a local economy using Imbassaí as a case study. Please take time to read the following information carefully and please ask if anything you read is not clear or would like more information.

What is the purpose of this research?

The purpose of this research is to examine how much money tourists spend in the destination and how money flows across different tourism service providers (e.g. accommodation, food and drinks, activities, shopping) and tourism suppliers. To do so, standard questionnaires that have been developed and used by development organisations will be carried out.

Why have you asked me to take part?

You have been asked to take part because your contribution in this research is essential in order to draw a 'comprehensive picture' of the situation in Imbassaí. Your knowledge and expertise about tourism in Imbassaí will provide great insight for the study.

Do I have to take part?

It is entirely up to you. If you take part, I will ask you to sign a consent form. However, you are free to withdraw at any time, without giving a reason.

If I take part, what am I required to do?

The research will be carried out within four weeks (from mid-February to mid-March) in the destination. You will be asked to participate in a face-to-face interview that will be carried out at your workplace and will last up to 60 minutes. As mentioned before, the interview will be based on a standard questionnaire. The following topics will be covered:

- Business information (e.g. rooms, facilities, rates, number of employees)
- Customer information (e.g. type of traveller, origin)
- Costs and revenue

How will the information be handled and stored?

During fieldwork, the questionnaire data will be entered into an electronic file (pre-defined Microsoft-Excel-based framework) on an encrypted Lap-top. The electronic file will be uploaded to the university's secure storage system. The data can only be accessed by authorised persons i.e. the researcher, the Director of Studies and the first supervisor. For the long-term, a final coded version of the electronic file will be available on the university's data archive.

Will anyone be able to connect me?

All information will be kept strictly confidential during and after the research. A coding system will be applied to protect the identity of participants.

All information that could relate to participants and businesses will be deleted from the final version.

How will results be used?

I will use the results for my doctoral thesis and potential further presentations or publications (e.g. journal articles).

How can I contact you?

My contact details are:
Theres Winter, theres.winter@shu.ac.uk
Sheffield Hallam University, Science Park, Unit 5, Sheffield, S1 1WB

Appendix 7: Consent Form - Part 1

Sheffield Hallam University

English Version

PARTICIPANT CONSENT FORM

TITLE OF RESEARCH:

Impacts of tourism on a local economy in Brazil's Northeast

Please answer the following questions by ticking the response that applies

		YES	NO
1.	I have read the Information Sheet for this study and have had details of the study explained to me.	☐	☐
2.	My questions about the study have been answered to my satisfaction and I understand that I may ask further questions at any point.	☐	☐
3.	I understand that I am free to withdraw from the study within the time limits outlined in the Information Sheet, without giving a reason for my withdrawal or to decline to answer any particular questions in the study without any consequences to my future treatment by the researcher.	☐	☐
4.	I agree to provide information to the researchers under the conditions of confidentiality set out in the Information Sheet.	☐	☐
5.	I wish to participate in the study under the conditions set out in the Information Sheet.	☐	☐
6.	I consent to the information collected for the purposes of this research study, once anonymised (so that I cannot be identified), to be used for any other research purposes.	☐	☐

Participant's Name (Printed): ______________________

Participant's Signature: ______________________ **Date:** ____________

Contact details: ____

____

Researcher's Name (Printed): Theres Winter

Researcher's Signature: ____

Researcher's contact details: Theres Winter, theres.winter@shu.ac.uk

Sheffield Hallam University, Science Park, Unit 5, Sheffield, S1 1WB

Please keep your copy of the consent form and the information sheet together.

Appendix 8: DMP - Part 1

DATA MANAGEMENT PLAN
PhD Research Part 1: Pro-Poor Value Chain Analysis (VCA)

Data Collection			What data will you collect or create?				How will the data be collected or created?		
	Method	Tool	Document	Type	Format	Volume [paper-based/ Byte]	Organising	Naming	Versioning
Pro-Poor VCA	Initial VCA-Mapping	Workshop	Photographs	Images	JPEG	10/ ?	Research_Part_1 1_Data 1_Database 2_Images 3_Text 2_Documentation 1_DocuSheet 2_ConsentForm 3_InformationSheet 4_Methodology	VCA-Map_Workshop_Image_No_YYYYMMDD_vx.x	v1.0 - original doc v1.1 - minor revisions v2.0 - substantive changes
			Database - List of service provider & supplier	Quantitative data	Excel	?		VCA-Map_Database_YYYYMMDD_vx.x	
	Tourism Value Chain Survey	Standard questionnaire	Filled questionnaires	Quantitative data	Hardcopies	150		TVCS_Questionnaire_Surname_No_YYYYMMDD	
			Database - TVC Survey data	Quantitative data	Excel	?		TVCS_Database_YYYYMMDD_vx.x	
	Tourist Survey	Standard questionnaire	Filled questionnaires	Quantitative data	Hardcopies	50		TS_Questionnaire_Surname_No_YYYYMMDD	
			Database - Tourist Survey data	Quantitative data	Excel	?		TS_Database_YYYYMMDD_vx.x	

DATA MANAGEMENT PLAN
PhD Research Part 1: Pro-Poor Value Chain Analysis (VCA)

Documentation and Metadata			What documentation and metadata will accompany the data?				
	Method	Tool	Document	Format	Volume [paper-based/ Byte]	Organising	Naming
Pro-Poor VCA	Initial VCA-Mapping	Workshop	Documentation Sheet (incl. study-level and data-level documentation)	Word Doc	1/ ?	Research_Part_1 1_Data 1_Database 2_Images 3_Text 2_Documentation	
			Consent Forms	Word Doc	10/ ?		
			Participant Information Sheet	Word Doc	1/ ?		
	Tourism Value Chain	Standard	Documentation Sheet (incl. study-level and data-level documentation)	Word Doc	1/ ?		
			Consent Forms	Word Doc	50/ ?		TVCS_ConsentForm_Surname_No_YYYYMMDD

DATA MANAGEMENT PLAN
PhD Research Part 1: Pro-Poor Value Chain Analysis (VCA)

Documentation and Metadata		What documentation and metadata will accompany the data?				
Method	**Tool**	**Document**	**Format**	**Volume [paper-based/ Byte]**	**Organising**	**Naming**
Survey	questionnaires	Participant Information Sheet	Word Doc	1/ ?	1_DocuSheet 2_ConsentForm 3_InformationSheet 4_Methodology	
		Questionnaires (original)	Word Doc	5/ ?		
Tourist Survey	Standard questionnaire	Documentation Sheet (incl. study-level and data-level documentation)	Word Doc	1/ ?		
		Questionnaire (original)	Word Doc	1/ ?		

DATA MANAGEMENT PLAN
PhD Research Part 1: Pro-Poor Value Chain Analysis (VCA)

<table>
<tr><th colspan="2">Ethics</th><th>How will you manage any ethical issues?</th><th>How will you manage copyright and Intellectual Property Rights (IPR) issues?</th></tr>
<tr><td colspan="2">Method</td><td>Overt Research & Consent Form</td><td></td></tr>
<tr><td rowspan="3">Pro-Poor VCA</td><td>Initial VCA-Mapping</td><td rowspan="3">Ethical issues may arise at different stages of the research process (Saunders et al., 2012).

The first part of this doctoral study utilises a standard methodology of pro-poor VCA that has been tested and recommended by well-known practitioners in the field (Ashley, Mitchell and Spenceley, 2009). Therefore, the design of the methodology underwent rigorous scrutiny without ethical problems and dilemmas being identified (ibid.). Using standard questionnaires and guidelines limit the researcher in exercising control which could impact on the participants' privacy (Sekaran, 2003).

The fieldwork will be carried out in Imbassaí - a coastal tourist destination in the Northeast of Brazil. The researcher has an established network in the destination which facilitates access to the destination.

The researcher will conduct the research overtly i.e. will introduce herself as a researcher share research aim and objectives with research participants, and ask for consent (Zikmund, 2000).

Whilst in the tourist survey, agreeing to complete the standard questionnaire is taken as consent by respondents, the researcher will obtain a signed consent form from participants of the workshop and the 'tourism value chain survey'.</td><td rowspan="3">For research students, the copyright in the thesis submitted for examination remains with the candidate, but all other Intellectual Property rights lie with the University and/or the funder of the research project - including those over the research data produced for the thesis.

See the Regulations for the Awards of the University's degrees of Master of Philosophy and Doctor of Philosophy (pdf), the Student Intellectual Property Regulations, and the Student Terms and conditions.</td></tr>
<tr><td>Tourism Value Chain Survey</td></tr>
<tr><td>Tourist Survey</td></tr>
</table>

DATA MANAGEMENT PLAN
PhD Research Part 1: Pro-Poor Value Chain Analysis (VCA)

Responsibilities & Resources		Who will be responsible for data management?	What resources will you require to deliver your plan?
Method		Responsibilities	Resources
Pro-Poor VCA	Initial VCA-Mapping Tourism Value Chain Survey Tourist Survey	The University's Research Data Management Policy says that the responsibility for research data management "lies with the principal investigator or in the case of a PhD project, the director of studies. It is their duty to ensure that all members of the research team with access to the research data adhere to good research data management practice." The responsibility for data management lies with my Director of Studies in order to ensure that I, as a Doctoral Researcher, comply with policies and regulations. The Data Management Plan has been developed by the Doctoral Researcher, discussed and adapted with Library Support Staff and approved by my Director of Studies.	- support with requesting access to Q:\Research Drive & SHURDA - support with depositing in a research data repository (Q:\Research Drive & SHURDA)

DATA MANAGEMENT PLAN
PhD Research Part 1: Pro-Poor Value Chain Analysis (VCA)

Storage and Back up		How will the data storaged and backed up during the research?	How will you manage access and security?
Method		Storage and Back up	Data Security
Pro-Poor VCA	Initial VCA-Mapping	During the fieldwork, a SHU encrypted Laptop will be used. The data (from hardcopies) will be entered into pre-defined Microsoft-Excel-based frameworks (see: DMP: Data Collection, Databases) and regularly updated version of the file will be uploaded to SHU's Research Store (Q:\Research Drive). The hardcopies will be digitalised and uploaded to SHU's Research Store. Afterwards, all hardcopies will be destroyed. A photograph of consent forms - hardcopies will be taken and uploaded to SHU's Research Store (Q:\Research Drive). All hardcopies will be destroyed. In case, data cannot be uploaded, an encrypted USB stick, that has been provided from SHU, will be used.	Using SHU's Research Store is beneficial in a way that files are stored at a secure location. Furthermore, backup copies are created every night and stored at a remote location which increases security.
	Tourism Value Chain Survey		
	Tourist Survey		

DATA MANAGEMENT PLAN
PhD Research Part 1: Pro-Poor Value Chain Analysis (VCA)

Data Sharing & Restrictions			What data will you collect or create?			How will you manage ethical issues?	Which data are of long-term value and should be retained, shared, and/or preserved?			How will you share the data?	Restrictions on data sharing?
Method		Tool	Document	Type	Format	Confidentiality	Anonymisation	Long-term value	Preservation	Sharing	Restrictions
Pro-Poor VCA	Initial VCA-Mapping	Workshop	Photographs	Images	JPEG	- Photographs will be uploaded to Q:\Research Drive - Thereupon, they will be deleted from the camera	cannot be anonymised	✘	✘	not shared	n/a
			Database - List of service provider & supplier	Quantitative data	Excel	- Database will be regularly updated and uploaded to Q:\Research Drive	cannot be anonymised	✘	✘	not shared	n/a
			Documentation Sheet (incl. study-level and data-level documentation)	Qualitative data	Word Doc	n/a	n/a	✘	✘	not shared	n/a
			Consent Forms	Qualitative data	PDF	- hardcopies will be digitalised and uploaded to Q:\Research Drive - thereupon, hardcopies will be destroyed	cannot be anonymised	✘	✘	not shared	n/a
			Participant Information Sheet	Qualitative data	Word Doc	n/a	n/a	✘	✘	not shared	n/a
	Tourism Value Chain Survey	Standard questionnaire	Filled questionnaires	Quantitative data	PDF	- hardcopies will be digitalised and uploaded to Q:\Research Drive - thereupon, hardcopies will be destroyed	cannot be anonymised	✘	✘	not shared	n/a
			Database - TVC Survey data	Quantitative data	Excel	- Database will be regularly updated and uploaded to Q:\Research Drive	need to be anonymised	✓	✓	uploaded to SHURDA	embargo of app. 2 years
			Documentation Sheet (incl. study-level and data-level documentation)	Qualitative data	Word Doc	n/a	n/a	✓	✓	uploaded to SHURDA	no restrictions
			Consent Form	Qualitative data	PDF	- hardcopies will be digitalised and uploaded to Q:\Research Drive - thereupon, hardcopies will be destroyed	cannot be anonymised	✘	✘	not shared	n/a
			Participant Information Sheet	Qualitative data	Word Doc	n/a	n/a	✘	✘	not shared	n/a
			Questionnaires (original)	Qualitative data	Word Doc	n/a	n/a	✓	✓	uploaded to SHURDA	no restrictions
	Tourist Survey	Standard questionnaire	Filled questionnaires	Quantitative data	PDF	- hardcopies will be digitalised and uploaded to Q:\Research Drive - thereupon, hardcopies will be destroyed	n/a	n/a	n/a	not shared	n/a
			Database - Tourist Survey data	Quantitative data	Excel	- Database will be regularly updated and uploaded to Q:\Research Drive	anonymised	✓	✓	uploaded to SHURDA	embargo of app. 2 years
			Documentation Sheet (incl. study-level and data-level documentation)	Qualitative data	Word Doc	n/a	n/a	✓	✓	uploaded to SHURDA	no restrictions
			Questionnaire (original)	Qualitative data	Word Doc	n/a	n/a	✓	✓	uploaded to SHURDA	no restrictions

Appendix 9: Information Sheet - Part 2

Sheffield Hallam University

PARTICIPANT INFORMATION SHEET

TITLE OF RESEARCH:

The influence of tourism on local people's lives in Brazil's Northeast

My name is Theres Winter and I would like to invite you to take part in my research on how tourism influences local people's lives in Imbassaí. Please take some time to read the following information carefully and please ask if there is anything unclear and/ or you would like more information.

What is the purpose of this research?

The purpose of this research is to explore how tourism influences local people's lives in Brazil's Northeast. The research seeks to answer the following questions:

- How is income from tourism used?
- What other opportunities does tourism provide?
- What are the challenges/ consequences of tourism development?
- How might tourism impact differently e.g. on different households?
- Who is involved in tourism? How are people involved/ how do they influence tourism development?

If I take part, what am I required to do?

The research involves two tasks for you: to take photos and to participate in an interview. In more detail:

- You will be tasked to take photos of how tourism influences your life. To do this, you will be given a disposable camera. After taking all photos you would like to take, I will develop them and return them to you – without looking at them. You can choose the photos you would like to discuss in the interview.
- The interview will be carried out when it is convenient for you. In the interview, you can tell me about the photos you took (and didn't take, although you wanted to) and we will discuss some further exploratory questions on how tourism influences your life. The interview will be audiotaped to accurately record the information you provide. The recordings will be used for transcription purposes only.

Do I have to take part?

It is entirely up to you! If you do take part, you will be asked to sign a consent form to confirm your participation in this research and to enable the use of interview information and the reproduction of photographs, once they are all anonymised, for research outputs including the PhD thesis, publications, presentations and exhibitions (in electronic and print form).

Can anyone connect me?

All information (audio-recording, transcription and photos) will be securely stored and will be treated confidentially. To protect your identity, your name will not be used in any publications or presentations. Your photos will be anonymised by pixelating any personal identifiers.

How can I contact you?

My contact details are: Theres Winter, t.winter@shu.ac.uk
Sheffield Hallam University, Science Park, Unit 5, Sheffield, S1 1WB

Appendix 10: **Consent Form - Part 2**

Sheffield Hallam University

PARTICIPANT CONSENT FORM

TITLE OF RESEARCH:

The influence of tourism on local people's lives in Brazil's Northeast

Please answer the following questions by ticking the response that applies

		YES	NO
1.	I read the Information Sheet for this study and/ or I had details of the study explained to me. My questions about the study are answered to my satisfaction and I understand that I may ask further questions at any point.	☐	☐
2.	By participating in this research project, I understand that I am agreeing to take photographs and to participate in an interview to reflect on the task, to discuss the photographs and potential further questions.	☐	☐
3.	I understand that it is my responsibility not to put myself at any additional risk in undertaking the photography task. I agree that I will ask permission of any individual that I wish to photograph.	☐	☐
4.	I wish to participate in this study under the conditions of confidentiality outlined in the Information Sheet.	☐	☐
5.	I understand that I am free to withdraw from the study, without giving a reason for my withdrawal or to decline to answer any questions in the study.	☐	☐
6.	I consent to the information collected for the purpose of this research study, once anonymised (so that I cannot be identified) to be used for research outputs including the PhD thesis, publications, presentations and exhibitions (in electronic and print form).	☐	☐
7.	I consent to my photographs, once anonymised through pixelation of any personal identifiers, to be reproduced for research outputs including the PhD thesis, publications, presentations and exhibitions (in electronic and print form).	☐	☐

Participant's Name: ____________________

Participant's Signature: ____________________ **Date:** __________

Contact details: ____________________

____

Researcher's Name (Printed): **Theres Winter**

Researcher's Signature: ____________________

Researcher's contact details: Theres Winter, t.winter@shu.ac.uk

Sheffield Hallam University, Science Park, Unit 5, Sheffield, S1 1WB

Please keep your copy of the consent form and the information sheet together.

Appendix 11: Interview Guideline - Part 2

Interview guideline

Draft: 12/06/2017

Photo-elicitation project by Theres Winter (June – August 2017)

Intro

- How was 'taking the photos' for you?
- How did you do it? Did you plan which ones you want to take? Or did you take them spontaneously?
- How many did you select? Which ones would you like to talk about?
- Can you choose five photos (from your selection) that are most important?

Part 1: Discussing each photo

- What does the photo show?
- When did you take it? Can you tell me something about the situation?
- Why did you take it? Can you explain/ clarify how this [=what is shown on the photo] links to how tourism influences your life?

Part 2: Discussing other 'images'

- Did you want to take other photos, but couldn't do so?
- Why couldn't you take it?
- Why would you have liked to take it? Why is this important of how tourism influences your everyday life?

Part 3: Discussing further 'topics' (if not covered in part 1 & 2)

- What is your job role in tourism? Have you always done the same job?
- Since when do you work in tourism?
- Has your life changed since you work in tourism?
- How is it different? Can you describe a day before and after?
- How do you value this change?
- Does employment in tourism help you to do anything you couldn't do before? Does it provide opportunities? Or is it the other way i.e. tourism prevents you from doing something?
- Do you think tourism impacts on all local people in the same way? Or are there differences? If yes, why do you think there are differences? What are the differences? And for whom? [distribution of tourism impacts]
- Who is involved in tourism? Who is influential? Why (e.g. economic, historical, political)? Do all these actors are equally influential? Who is more, who is less?
- Do these actors influence you? How do you engage with them?
- Does anything need to change? If yes, what needs to change? Do you think this change is possible?

Closing

- How was ‘the interview’ for you?
- Do you have any questions?

Appendix 12: DMP - Part 2

DATA MANAGEMENT PLAN
PhD Research Part 2: Photo-elicitation

<table>
<tr><th colspan="4">What data will you collect or create?</th><th colspan="3">How will the data be collected or created?</th></tr>
<tr><th>Document</th><th>Type</th><th>Format</th><th>Volume [paper-based/ Byte]</th><th>Organising</th><th>Naming</th><th>Versioning</th></tr>
<tr><td>Photographs</td><td>Images</td><td>JPEG</td><td>max. 780 pictures/ ?</td><td rowspan="4">Research_Part_2

1_Data
1_Photos
2_Interview recordings
3_Interview transcripts
4_ Research notes

2_Documentation
1_ConsentForm
2_InformationSheet</td><td>Interview_xx_photo_xx_YYMMDD</td><td rowspan="4">v1.0 - original doc
v1.1 - minor revisions
v2.0 - substantive changes</td></tr>
<tr><td>Interview recordings</td><td>Qualitative data</td><td>WMA</td><td>?</td><td>Interview_XX_YYMMDD</td></tr>
<tr><td>Interview transcripts</td><td>Qualitative data</td><td>Word</td><td>?</td><td>Interview_XX_YYMMDD</td></tr>
<tr><td>Research notes</td><td>Qualitative data</td><td>Word</td><td>?</td><td>Interview_XX_Research notes_YYMMDD</td></tr>
</table>

What documentation and metadata will accompany the data?

Document	Type	Format	Volume [paper-based/ Byte]	Organising	Naming
Consent Forms	Qualitative data	Word Doc	20/ ?	Research_Part_2 1_Data 1_Photos 2_Interview recordings 3_Interview transcripts 4_ Research notes 2_Documentation 1_ConsentForm 2_InformationSheet	
Participant Information Sheet	Qualitative data	Word Doc	20/ ?		

How will you manage any ethical issues?	How will you manage copyright and Intellectual Property Rights (IPR) issues?
Overt Research & Consent Form	
see: SHUREC2a	**For research students, the copyright in the thesis submitted for examination remains with the candidate, but all other Intellectual Property rights lie with the University and/or the funder of the research project - including those over the research data produced for the thesis.** **It is important to note that participants are the owners of photos they took. The researcher produced a 'photo reproduction rights form' to confirm participants' content for reusing the images in publications and presentations.** ***See: Regulations for the Awards of the University's degrees of Master of Philosophy and Doctor of Philosophy (pdf), the Student Intellectual Property Regulations, and the Student Terms and conditions.***

How will the data be storaged and backed up during the research?	How will you manage access and security?
Storage and Back up	Data Security
During the fieldwork, a SHU encrypted laptop will be used. A copy of participants' chosen photos will be taken (either scan or 'photo of photo' with my phone). The copies, interview recordings and transcripts, as well as research notes will be saved on the laptop. If possible, they will be uploaded to SHU's Research Store (Q:\Research Drive) - however, the internet connection is very weak, so it might not be possible to do so. In case, data cannot be uploaded, an encrypted USB stick, that has been provided from SHU, will be used. Once, data is saved and backed-up, it will be deleted from my phone (photos) and audio-recorders (interview recordings). A photo of metadata (consent forms) will be taken, saved on the laptop and uploaded to SHU's Research Store (Q:\Research Drive) [if possible] or saved on an encrypted USB stick, that has been provided from SHU. Hardcopies of metadata will not be destroyed, but taken back to the UK.	Using SHU's Research Store is beneficial in a way that files are stored at a secure location. Furthermore, backup copies are created every night and stored at a remote location which increases security.

What data will you collect or create?				Which data are of long-term value and should be retained, shared, and/or preserved?					
Document	Type	Format	Volume [paper-based/ Byte]	Anonymisation	Long-term value	Preservation	Sharing		Restrictions
Photographs	Images	JPEG	max. 780 pictures/ ?	need to be anonymised through pixelation	✓	✓	shared - once anonymised	uploaded to SHUDRA	embargo of app. 1 year
Interview recordings	Qualitative data	WMA	?	cannot be anonymised	✓	✓	not shared	n/a	n/a
Interview transcripts	Qualitative data	Word	?	need to be anonymised through coding	✓	✓	shared - once anonymised	uploaded to SHUDRA	embargo of app. 1 year
Research notes	Qualitative data	Word	?	not to be anonymised	✓	✓	not shared	n/a	n/a

Who will be responsible for data management?	What resources will you require to deliver your plan?
Responsibilities	**Resources**
The University's Research Data Management Policy says that the responsibility for research data management "lies with the principal investigator or in the case of a PhD project, the director of studies. It is their duty to ensure that all members of the research team with access to the research data adhere to good research data management practice." The responsibility for data management lies with my Director of Studies in order to ensure that I, as a Doctoral Researcher, comply with policies and regulations. The Data Management Plan has been developed by the Doctoral Researcher, will sent for approval to Library Support.	n/a

Appendix 13: Interview Transcript

R	Thank you very much for participating and also for taking the pictures.
I	You are welcome, you are welcome.
R	I saw in your pictures that you are very proud of your business. [PHOTO 1-8]
I	Yes, yes.
R	And I think that your guests feel it. I think it makes a difference. From the pictures, what I would say is that you are happy to do this work and to make the guests happy…
I	Yeah! For me, it's very important, I mean, we are a business that…. *[break]* Our business it was people work for the rest of the year and then they come and they wanna spend their holidays. And they want good holidays, because obviously they work for their holidays. And we are in a foreign country for their holidays and so maybe they don't know where they are coming. And I know that my experiences of holidays, it was thanks to people I have met, things I have seen, sports I have done, memories that are with my family, but also with the people that were around me at that time. So, yes, I think, it is very important for me, to give them more than the amount they give me as money. It's just like souvenirs and things you cannot buy as such. So, yes, experiences of sports that they would have never done or animals they would have never seen. Things like that. And if you don't care and you are just a hotel and you are just like "yeah, see for yourself", people don't see these things. They don't see the beauty of the place. Then they go back with just they have paid for, which is the hotel. So, for me it is important.
R	I think it makes a difference to the guest. And I think you see the success now. How long do you have the pousada?
I	The pousada is opened for three years now. *[break]* At the beginning, it wasn't clients that knew us or appreciated us, because we are quite different from the rest of this coast. So, we give something different. And at the beginning, we had a very nice grade on booking.com. And so people would just book, because we had a very nice grade on booking. And they didn't see what the pousada was like. And obviously at the beginning, we didn't think it was very important to say that we didn't have air-conditioning, to say that we are eco-friendly, to say that we don't have television. For us it was just no problem. But as such it was very bad, because people would come here and HATE the pousada. Because it wasn't clearly written on booking or whatever that we were eco-friendly, so no air-con, no this, no that.

	Now that it is completely written in big, and it is very visible, people come because we don't have air-con, because we don't have TV. So, now the clients are happy, because they know what they are gonna get.
R	They have the information beforehand and now what to expect...
I	Exactly.
R	Do you still have most of Brazilian customers? Or internationals?
I	We still have more Brazilians, but they are people that travel just one day on Saturday. So, during the year we have more Saturdays than big holidays. So, yes, we still have more Brazilians of 1:1. But in holiday… or in money-wise, we are nearly 50:50 between Brazilians that stay just one day and foreigners that come for five, six, seven days. We are nearly 50:50. And the 50 foreigners are a lot better for us as such, because we are more their type.
R	In the three years, what was the most challenging time for you in opening or operating the pousada?
I	Understanding that the pousada was eco-friendly and no TV. No cars. In the middle of nature. And being accepted by Brazilians. Not wanting money straight away. And say we will still be on booking the same way as we were, because we had a lot of clients, we had a great grade at the time. So, that was the challenge…I mean, if we stayed aiming for the Brazilians to have the pousada full every weekend, we would have gone down, because we are NOT this type of clients. These clients do not like us. So, that was the challenge. It was… We will stop to aim the Brazilians and we will try and aim for more foreigners and Brazilians that have travelled. And try... Instead of proposing to everyone, let's aim this. And try and have money only with this small range. So, that was the challenge, because for a year, it was quite hard, because we had neither the Brazilians nor the foreigners, because we still were a bit like… So, that was the problem. The hardest.
R	You said for the Brazilians that have travelled and the other Brazilians? What is the difference between them?
I	When anybody in the world, that travels, knows the richness he is leaving from his country and the richness there is in other countries. I am saying that Brazilians that haven't travelled are not our clientele, but, in reality, people who have not travelled are not our client. Because, unfortunately, when you don't travel, you get a bit closed-minded… you get a bit closed-in. You only know what you know and not what is happening outside. So, people, Brazilians, that have the luck to be able to travel, suddenly they realise that a big city like New York has no animals, has no nature, has a little park, big park, but just one. Actually, they might realise that the nature in Brazil is

	a big benefit. But you don't realise that until you go and see the other parts of the world that do not have a park or nature. That is the big thing. When you talk to people that know other countries, they realise the beauty of their own country.
R	Revalue.
I	Yes, revalue. But, not only Brazilians, I mean. You talk with European people. When they travel, you realise that they see their country in a different way; they see how rich it is. I mean, we have got social security, we do have. We do have work. We do have jobs. We have this. We have that. When you go to America. Puh! Social security none. Help none. So, you realise that every country has its problems, but every country has its big benefits.
R	After your holidays in America, are you happy to be back?
I	Yeah!
R	Yeah? You revalue this place again!?
I	Yes. Like every time. Like every time, obviously. *[break]* *[parts taken out]* But, yeah, when you come back, and you realise that there are things that are not that bad. Like everywhere, I mean. We are happy to come back. We are happy to have stayed in other hotels and see the service and what is expected and what we expect in a hotel. And when we come back, we realise that sometimes we are lost and we need information. So, if our client asks us twenty times, where is the restaurant in Imbassai, you just need to help, because you could be in the same situation. So, it helps to put things into perspective. When you are lost, you are very happy to have someone who helps you.
R	*[parts taken out]*
I	*[parts taken out]*
R	*[parts taken out]*
I	*[parts taken out]*
R	*[parts taken out]*
I	*[parts taken out]*
R	*[parts taken out]*

I	*[parts taken out]*
R	*[parts taken out]*
I	*[parts taken out]*
R	*[parts taken out]*
I	*[parts taken out]*
R	*[parts taken out]*
I	*[parts taken out]* There are only some owners that can just work without taking any money, because they know that the land is theirs. But, as such, I mean… I am sure you can ask *[name]* and *[name],* and every owner here. We don't earn money, we have the place. We don't earn money, because you can't.
R	Yes, I was thinking how it works with an occupancy of 30, 40 percent of most of the pousadas.
I	You can't. *[shakes her head]* I don't think so. For our case, it is not. Not at our standards. What we have is what we had before. That made us buy the place. And this is our richness. But the pousada does not make enough money. All the money that goes in, goes back out into the pousada, because the pillows have to be changed, because the painting has to be done, because of this, because of that, because the salaries, because the wages are going higher, because you want to make someone happy, it's his birthday, so you give them a little plus. I am sure, I mean, *[name]* and all the others… I think what they have is their assets, house and land. That is their richness. I am not sure if they have a lot of money in their bank-account. I am not sure… I am not! Their richness is what they own, what they have, because a hotel in Imbassaí, or around here, doesn't bring you millions.
R	What do you think are the three good things tourism brought to Imbassai?
I	Work. Work. Modernity, because we have a very high quality internet in Imbassai. We are having roads. We are having parties. And, unfortunately, parties and roads and all that and tourism bring also drugs and violence and all that.

R	That would have been my next question: what are the three bad things tourism brought?
I	Well, it goes together. It goes together. Unfortunately, it goes together. Parties are nice, they make people meet and make people communicate. Internet makes them to have communication with the world. The beach is nice, everything is clean. Tourism in Imbassaí is an ecological kind of tourism that is due to the nature of foreign tourists. It is a new kind of tourism that is brought by international tourists. So, tourism makes the place cleaner. When we arrived, I remember, there was just a lot of rubbish in front of the pousada, just left there. And now, this is not the case anymore. The idea is: tourists are coming, so we need to have a nice city. That is what tourism brought. It also brought work, jobs, and a bit of order and nice kind of atmosphere in Imbassai.
R	And the negatives, the three negatives…
I	Drugs. That's for sure. Violence. That kind of violence. And what? Another one? *[thinks]* A third one, that tourism… *[thinks]* As such, you could say… *[thinks]* The building that are being built over there…
R	The condominios?
I	Yes. The Yukitiba... something like that! You could say: oh, they DESTROYED our nature. But, no, I think, if you have laws and if you try and keep the nature and build houses, I think it brings something good. I mean, in order to grow, you need to destroy a bit of things. So, I don’t think it is a bad thing. I mean, what I hope now, that this place will be lively, will have kids and people, and families. I hope. And if they did this and destroyed the nature, and nobody is buying the places, that is bad, that is awful, that is rubbish. But if there are families, and if there are people, and if there is business, …
R	...creates life in Imbassai...
I	Yeah, yeah!

R	The issues of drugs and violence, do you think they will change in the next years? Or do you think it will get worse?
I	I don't think it will change. In Europe, I feel that we don't see it a lot, but I went to America, like a week ago, and I went to Philadelphia, and drugs are everywhere. Drugs are EVERYWHERE. I, honestly, saw, because obviously it is a season, where there are not a lot of locals in Philadelphia or New York, because everybody leaves for holidays. So, there are only the poor people that stay there or the tourists. I think I have met more crazy people under crack than normal people. It was amazing! Philadelphia was just… I LOVED the city. The city was amazing. But: OH GOD, I don't think I talked to a normal person. They are all, ALL OUT of it. You can see them with their shopping trolley…and they have got their houses in there and they are talking to themselves. And they are black, they are white, they are yellow, they are blue… whatever colour. I mean, the colour doesn't matter. It is not a question of colour. And New York is the same thing. New York was even harder, because New York at six o'clock in the morning, when we had a nice evening out and we go back home and it is six o'clock in the morning, and we see a lot of people, white, especially white, with a working blouse - so, they were cashiers at Walmart or they were security of a bank and so, and they were sleeping on the road. They had a salary, but the salary couldn’t pay a house anymore. A house! So, they would sleep on the road. And that I have seen that. I have seen that in India, in Mumbai. But Mumbai is not New York. I think in that six-o'clock-walk we had half an hour in the best areas of New York, which are the… fifth avenue, central park, times square. I mean, honestly, as tourists, that's what we do. We had half an hour walk. And there were at least 50 people, probably 10 blacks and all the rest white, which is not a problem, but it is just a shock because it is not the way I would see it before. So, yeah. 10 Blacks. 40 Whites. With working blouses. Just sitting there. Waiting. You know they have slept there. You know they have slept on the road. And, eh, that was quite, eh, quite sad. And, eh, quite disturbing. To see them. They are clean. They are… people you could talk to. They are not homeless. They are now, but they are not homeless for years and just don't give a fuck of everything. So, that was very hard. So, no, I don't think drugs will change here. Because if they are over there…
R	It is not about Brazil; it's everywhere in the world. Do you think the poor people without education, who are maybe also not employed in tourism, are more affected by drugs? Or is it everyone here?
I	No, not everyone here. I don't think so. I hope not. They think "drugs" is easy money. *[break]*

	They think it is easy money and when you see all those tourists that have IPhones and things and that, and you don't, and you will never have, and you realise, and you know that just selling…just that little, little thing of power, you have a hundred or two hundred Reais, I don't even know how much it is, but: just selling that little thing, you say: OH JACKPOT! That's THE WAY to do it. And you don't, you don't see obviously what's gonna happen after. Because obviously, there is… there is the fight of the land and the fight of the dealers. And you are getting your family in danger, and you are getting yourself in danger. You have got all that, but…
R	But by now they should have realised it here, shouldn't they? After a few people were killed…
I	It always happens… EVERYTHING always happens to the other. NOT, NOT ME. No, never.
R	Ah, this is their thinking!?
I	I will be more intelligent. But everybody thinks like that. I mean.
R	I wouldn’t do this mistake again. Yes, that's true.
I	Yeah. I mean people smoke and there is cancer everywhere. And people drink and there is this. And people… I mean! Because it never happens to me, it always happens to others. Yeah, I know a family that had this. I know the son that got killed by drugs. BUT ME??? That's the feeling of everyone. Everybody thinks that.
R	Yes, that's true.
I	So, just deal for a year and get my money and finish. No, never finish.
R	It doesent work.
I	It doesn't work that way. But I will be more intelligent. I will be more… I leave. I have enough money to leave. It happens, but to a very few. VERY few.
R	How do you think people working in tourism value tourism? Do you think they all see it the same? You said the benefits of tourism are for example, money, development here. Do you think everybody who is in Imbassai sees it the same?
I	NO!! I don't think so. I think a lot of people think that the big hotels destroy the nature here. I don't like the large hotel complex in Imbassaí. I don't LIKE it. But, I was in Europe and I opened a book and I saw "hotel complex Imbassaí". I was so proud. Imbassaí is

	on the map because of this hotel complex. I mean: Where would you have an Imbassai article if it wasn't for the hotel complex? I mean. It is not me, or Pousada X or Pousada Y that is gonna have an article. It's the hotel complex. *[laughs]* So, I mean, I just… it grows… I mean. That's the way it is, I mean. What we need is laws to be able to build without destroying or without destroying too much. That is what we need. I mean, we need a system of EMBASA to recycle water. Bigger and BEFORE Brazil sells land to pousadas. It is not MY problem that I cannot recycle the water. Brazil sold me the land. Brazil takes my taxes to have a hotel here. Brazil is very happy that I have a hotel here, BUT they didn't think that I need water to be recycled. But that's not my problem, I mean. So, THAT is the BAD thing of tourism. But it is not because of tourism. It's not because of people buying land or wanting to build. I mean it should go together, it should grow together.
R	Are you referring to the organisation of the prefeitura?
I	Yeah! *[thinks]* Prefeitura, corruption, money goes where it doesn't need to go.
R	Do you think that the prefeitura should do more in terms of organisation, planning, so that tourism will be sustainable in a way?
I	It is not THE prefeitura. It is Brazil. Any country should try and see, if I sell this land, to have a hotel, I NEED to be able to give them the service to not destroy the nature, to not destroy the lakes. To, I mean… It is not JUST the prefeitura. It is the government… I don't know who it is… I don't know them exactly. I don't know how it works. But before selling one piece of land, you need to be able to know that the nature and everything won't be destroyed. You cannot ask money one way and just let it go the other way. So, it is not just the prefeitura; it is the whole system. I mean, we cannot have, we cannot have parties, we cannot have tourists, we cannot have big houses here in Imbassai, without police. I mean, it doesn't work together. It doesn't work without one or the other. So, before opening those big condominios, before making big parties, try and have the police on set. That's how it works.
R	Is it lack of knowledge then? Or they don't know or they don't want?
I	THEY WANT MONEY.

R	So, it's all about money!?
I	Yeah. They want money. I think. I don't know. I think. They are happy to have our money, and that's it! Instead of having a bit of money and spending at least half of it to get security, and to get the water, and to get EMBASA… to get… Now, I mean, yesterday, a new tax came on for the pousadas. To turn off fire. Oh, so, if I had a fire a week ago, you wouldn't come with the "bombeiros". So, now I have to pay a tax because there is a "servicio de bombeiro" *[shakes her head]* You know, that THIS tax is rubbish… You know it. It is just…
R	Will you do something about it?
I	NO! I don't think so. I am not a big protester. But I know that people are. For example, *[name]* goes to meetings and *[name*] does to represent Imbassai. So, I am very happy for them. I mean, as such, I am just really making them work for me. That's good. I am guilty myself. I don't spend the time and time that they do. I think the solution is to have groups and fight. I am not like that. I am not that character. So, I don't like it. And I am not that character. I spent a few hours with them in reunions and meetings and stuff like that. And just TALK and talk and talk…
R	Do you see success after all the talk, and talk, and talk?
I	*[thinks]* I imagine, because now we have streets that are "in hard". And it's not only a "barro". Ten years ago, it was "barro" (=clay). I imagine, because we have a bit of "esgoto" (=sewage system). So, I don't have it… STILL. But I imagine some here have. I imagine maybe it helps a bit.
R	And if they wouldn't be there, would you just pay the tax? Because you are not the type of protester?
I	Well, we are just paying taxes… already.
R	So, the new one as well? You will do it?
I	Yeah [sighs] Us, yes. Us, yes. Because…We are not, we are not the ones that yell. And we are not the ones that protest. And, so, we just pay. And we hope, I mean, obviously, if I know someone from the prefeitura, I hope to have my little thing dealt with. And I speak to *[name]*. And: uh, I need your help with this. If it works, it works. If it doesn't, well, it doesn't.

	I know that is not good from my part. I know. But, that's how it is.
R	What is the role of these networks? Do you think most of the things in Brazil work because of networks? Because I know somebody here and there!?
I	YEAH!! *[emphasis]* Otherwise you wouldn't get what you want.
R	I know from a friend who bought a house and he wanted electricity at the house. But he said I know it won't come in the next two years, if I don't ask this rasta guy to give it to me and I give him 150 Reais extra.
I	That is what I am doing. You need to give people extra money, otherwise you can wait, wait and wait… and you do not get things done. It is what I am doing, unfortunately. For example, for electricity, I have asked, I have asked, I have asked. *[parts taken out]*
R	Have you given up?
I	WELL, YEAH… I have given up. I still don't have my name on it. *[parts taken out]* Brazil, they don't know how to do that. So, you need to have all the contracts on the date. But: every kind of other office takes so much time that the first one you have is out of date when you have collected all of them.
R	How do you think Imbassai would look like without tourism?
I	*[thinks]* Unfortunately, dirty, left with houses half-built, not built. No shops. No jobs. I mean, you go a big further up at the coast. Not very nice. Not very clean. It is not very nice. The houses are ugly. So, there are drugs ALSO. Because there it is more calm. There is no police. There it is more calm. They do their business there. And just come here and sell it and go back over there. So, weirdoes, you see them over there. Yeah, that's the way it would be, I think.
R	Would you say tourism has not contributed to regional development in the Northeast of Brazil?
I	*[thinks]*
R	Or would you say it has brought wider benefits?
I	*[thinks]*

	In Guatemala, for example, we had a very nice place.
R	You have been in Guatemala. Me too!
I	Yes, really nice. Really nice. There was a very nice place, where you had a man who had a land and had a very, very nice waterfall. And he had arranged everything. Very, very small budget. But he had put little benches with wood. And he had a little coffee there. And he was very happy to welcome you. And you would very gladly give him 5 or 3 quetzal. In Brazil, I don't feel there is this thing of making a place nice and attractive to people. Eh, for example, Europeans come here, they want to do walks and want to go to Sapiranga. As such, there is not a real guide, there is not someone, where you could go and have a nice walk in the forest and have this trip. Eh, everywhere else I have been, not everywhere, but quite a bit, you have a little thing that organises stuff and I know that, for example, in Subauma, you have a very nice natural beach. So, not Subauma, Macarando do Pior, you have a very nice beach. There is nothing. It's nudist. It is completely nothing. But, as such, I mean, if it was a little bit more organised. Maybe, because they don't want it. It's nudist, natureza, it is like clean and natural. So, maybe, they want it that way. And even before this, there are waterfalls. There are little things, but nothing is organised for people to be happy to go there and visit it. So, that's why it doesn't grow. I don't know, but does the prefeitura help to tell people? Look, there is a very nice little city around. So, I think that is the problem that it didn't grow, because, I mean, you go out of here, nobody will help you or show you or tell you what to do.
R	Somebody else said to me that the Brazilian government does have no interest in tourism. It is something they have, but it is just they have, they don't invest in it. They don't see it as an industry that brings benefits. So, they think here is tourism, but he said: actually, no, they don't have tourism, because they don't use it in a way - like you explained. He said, it is not tourism from his perspective. It is just a few people coming to the beach and drinking beer. What do you think about this?
I	Yes, yes. It's true. It's true, I mean. I think… I mean, you could do a lot more. Yeah, a lot more. Just trying to promote, to talk about the location, to organise parties. But, it's difficult, because it means work. It means long hours. It means… little money, especially at the beginning. Work for what you need and spend the money you have. And everything else, we will see tomorrow. And that is quite a big mentality here. Don't work more than you have to, because what will you do with the money when you are dead?
R	In terms of tourism, the mentality is "either you, you tourist, like it or you don't".
I	Yeah, yeah, yeah. You like it, or you don't. I mean, yeah. It is just… ah…

	Do you know, I mean, you have been around a lot, do you know what's happening? The events in Imbassai? Do you know about it?
R	I heard about one event the day before, but I only I knew, because I know some people here that tell me. But I know other people here, locals, they don't know that these events are coming up.
I	Once, I have asked *[name]* from the restaurant why he didn't tell me about the party he organised. It was big party. It was at the beginning. I said: why didn't you tell me? *[He said]*: because… we weren't friends yet. Now we are friends. But I am not sure, he would tell me now. But, at the beginning, we weren't at all friends. I asked: why didn't you tell me? I could have sent you clients. Or even I would have gone. *[He said]:* I was scared that you would tell and that, for example, someone else would do a party on the same night. And… or you would do a party. You know like a "counter-party". So, I would take his customers out. So, that is not a good mentality. That is not the way… No, no, no, no.
R	How would you describe this mentality?
I	Well, there are two things, I mean. *[parts taken out]*
R	Do you think tourism in Imbassai is more for the "creme-de-la-creme" as you said?
I	NO.
R	No? Is it for everyone?
I	Yeah, yeah, yeah. Yeah, yeah, yeah. I would like it to be for the "creme-de-la-creme". I would like to have a hotel in a posh, little thing, but no, no. I think you can have very nice holidays, with very nice cute rooms. Our pousada has higher prices, but there are other pousadas around that are more simple. And you can eat well. You can have a nice pizza that is a bit of money, I mean, it's not cheap. I think you can even with a little money you can appreciate a lot of things. We had clients here that were very tight on money. And they LOVED a specific restaurant. I don't like it; I don't like it at all. But they loved it, because they had a lot of food for small money. *[break]* So, where was I? Big parties?
R	Creme de la creme?

I	Crème de la crema, yeah. And no. These for women wanted to spend 60 Reais and they were very happy to spend 60 Reais in the restaurant and have a LOOOT of bad food. I would have spent 60 Reais in one pizza and have a delicious pizza. Yeah, you can have very nice holidays in Imbassai with quality. Instead of other places, where it is lot less expensive, but the quality is not there. And for me: no quality is awful holidays. You can have a nice holiday in Imbassai. You can have nice food. You can have nice little pousadas. Small, I mean, you don't have to be at the beach. You can have a little one over there. Just clean.
R	It is affordable for everyone. Not just for the rich from the South, but for every Brazilian?
I	Yeah, if you don't want quantity. If you want quantity, no. I mean, honestly, apart from the restaurant mentioned earlier, all the restaurants here are expensive. But, for me, they are good quality, so, it doesn't matter. I mean, you can have less. If you have a lot of children and you need a big place and you want to eat a lot, no, that's too expensive. Imbassai is too expensive.
R	So, not in terms of tourism, but in terms of people living here? Brazil is a country of rich & poor, do you see this division here in Imbassai? Or would you say the division is not that big?
I	*[thinks]* I think there are two groups. There are the locals. And the foreigners, the pousada owners. Most of them are foreigners. Even someone from São Paulo is a foreigner for me, because he is not from here. So, you have got those that are not that rich and you have got the locals. I do not see big owners of houses that don't have a business here and that are very rich and live here. I don't see that kind of rich. So, I think there are two groups. There are the locals. And the foreigner pousadas owners. And it's true, when I speak to the REAL locals, I can feel a "that's strange". For me personally, I don't feel being "in one group" and I don't feel like being "in the other". For me, physically, I am an owner, a white owner of a pousada. But, I do not go to parties with them. I do not speak to them. I am not close to them. If at a party, for example, I see *[name]* and *[name]*, and I can see my employees or friends of my employees, I go to stay with them, because I feel closer to and less judged by them than by the other owners. But physically obviously I am more in their group. So, when I go and speak to the locals, they are a bit: uh, you are coming to speak to us!? Which is quite strange. But as such, I would never go close to the owners"
R	Do you think when they say "uh" they see a bigger difference, a bigger division, that they wouldn't expect you to talk to them because you are the owner and not the employee?

I	I think in Imbassaí everybody knows that we will say THANK YOU - even if it is a homeless person. I will say PLEASE, I will talk to them, I say Good morning - which at the beginning was a real shock for people. They would say: why would you say please? Why would you say thank you? I mean, it's human. I wouldn't give orders to people. For example, we had to cut grass here, and my neighbour [=another white business owner] said you need to "fiscalizar". Fiscalizar. Fiscalizar is not to tell people off, but fiscalizar is what the Prefeitura does. Fiscalizar is like to forbid. He said: you need to "fiscalizar" your employees, when they cut the grass. I said: Fiscalizar? No, I just need to look what they are doing. I DON'T need to. You know, it was really a superior kind of word. That's the way people talk to them. And NO, that has never been my way. So, now, everybody knows that. Everybody knows that I am more easy-going. But everybody knows also that I don't spend parties with the WHITE FOREIGNER people. And everybody knows that I don't REALLY spend parties with the locals, because I am not. I am not a real local. They see the difference.
R	Where do you think Imbassai will be, or how will it look like in five years?
I	*[thinks]* I hope it will be even cleaner. I hope there will even more shops. I don't expect and I don't want it to be like Praia do Forte, because Praia do Forte is not the reference for me. But I would like three more shops like Casa Amarela. Quality stuff. Maybe one more restaurant. Not more. It's enough restaurants. We have got enough. Maybe a nice salon to cut your hair. And maybe have nice nails. People that are there. Not a little thing that you open there and every now and again she is not there to cut your nails or to do whatever. Something more straight, more real. Like you have times on the door and the times are respected. The real times. You can go to the shop and the shop is open, when it's written that it's open. And not,… So, yeah. I hope to have more families with all those condominios. It would be nice to have more families. To have more people, maybe more parties on Saturday. And nice parties. Simple. I am not asking big thing. But it would be nice to have a quality group singing in the centre. Not a poor rotten cat - just MIAUMIAUMIAU *[makes the noises]* *[laughs]* Yeah, I HOPE in five years, it will be like that.
R	It sounds like a vision. How realistic is it? How possible?
I	*[thinks]* I have no idea.
R	And who will need to work on this vision?
I	*[name]* and *[name]*.... and…

R	The association?
I	Yeah. Just FIGHT, FIGHT, FIGHT. Still have this FIGHT going on. Unfortunately, I don’t think they are thinking the GOOD way, because…. Twice I have been to those reunions and twice the subject was these squads. They want to buy squads for the police. They bought only one, because they only had money for one. But the policemen need two, because they don’t patrol alone. But they bought one and instead of thinking "Well, we have got the money for two motorbikes. So, why don’t we, instead of one squad, why don't we buy two motorbikes?" Well, no, they bought one squad - thinking "Bom. We have got it". So, they bought one and now they are waiting for the money for the other one. But the other one, the first squad that has been bought will be rotten and all full of …rrrr…sea-salt, whatever. Ridiculous! And for me, so, when I said: ok, ok, ok, you are buying that. Ok, perfect. Who is gonna pay for the maintenance of the squads? Because obviously, one is gonna have a tyre broken and other things. Who is gonna…? "Eh…eh…We will see, we will see." AH! Who is gonna buy for the petrol? "Eh…eh…eh…eh…eh…eh…eh…eh." OK, BOM! And who is gonna have the employees? Is it the police that's coming? "Yeah, yeah, we need to pay a "sub"," You know, the policeman does his eight hours and twenty and gets his salary, and we will pay cash to the policeman to be four hours here out of his service as policemen. I said: that does not work like that.
R	Who is gonna pay?
I	Apparently, they had the idea of US paying a 100 Reais per month. So, the forty pousadas altogether, we would have… I don't know… 4,000 Reais… or how much to pay them. So, one: it's gonna spend six months, when everybody has money in the summer. And then in the winter: "Ah. I can't pay this month. Can I pay next month?" It's gonna start like that. I am sure. That's for sure. And second, for me: I am not the one that has to pay cash to the police. I am not gonna pay cash to the police. It's not the way to do it. I pay already my taxes. I pay everything in Brazil to HAVE security. So, the police can give me a policeman. I mean, the city is worth having a policeman around 24 hours, but NO. Ah, apparently NO. It doesn't work for me. They don't THINK. They don't. It's short-term, in the "moment thinking", not very long-term… It's for sure everybody's gonna pay for six month. The ones that want to be part of this…I mean, *[name]* looked at me very badly when I said I am not gonna pay for the squads. I understand that they are not happy with me not participating, because they try to do something and one of their most…. RICH… I mean, I am a pousada-owner, who has influence in Imbassaí, *[parts taken out]*

R	*[parts taken out]*
I	*[parts taken out]*

Note: parts have been redacted to adhere to confidentiality agreements and to ensure interviewee anonymity