

DISSERTATION

TOURISM, POVERTY, AND DEVELOPMENT: LOCAL PERCEPTIONS,
EMPOWERMENT, AND STRATEGIES FOR CHANGE IN PERU'S SACRED VALLEY

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ABSTRACT

TOURISM, POVERTY, AND DEVELOPMENT: LOCAL PERCEPTIONS, EMPOWERMENT, AND STRATEGIES FOR CHANGE IN PERU'S SACRED VALLEY

In the late 90s, growing emphasis on the eradication of global poverty led to a newfound focus on tourism as a tool for international development and poverty alleviation. During this time, Pro-Poor Tourism (PPT) emerged as an approach aimed at 'tilting the tourism cake' and unlocking opportunities for the poor. Since its inception, PPT has sought to find more effective ways to measure the effects of tourism on the poor, to better understand the link between structure, agency, and tourism-based poverty alleviation, and to highlight issues of power that may influence how poor people become involved in or benefit from tourism.

This dissertation addresses these trends in the PPT literature by seeking to understand and describe local perceptions of tourism-based poverty alleviation among four communities of Peru's *Valle Sagrado* (Sacred Valley). It focuses particularly on interactions between tourism associations in each community and Intrepid Travel, an international tour operator based in Melbourne, Australia. The research was conducted between June and December of 2013 and employed an ethnographic methodology known as Rapid Qualitative Inquiry (RQI) to gain insiders' perspectives on tourism-based poverty alleviation. Sources of data included semi-structured interviews ($N = 93$), field notes, participant observation, and documents and reports from the associations, Intrepid Travel, and various government institutions.

Study findings are presented in the form of three dissertation articles linking local perceptions of tourism and poverty to processes of empowerment, institutional change, and national discourses of development. Findings in the first article highlight expressions of power as

domination through tourism both *within* and *over* communities, alluding to interactions that contributed to the disempowerment of some local people. The article also notes processes of empowerment for tourism association members in terms of enhanced agency, collectivity, and self-awareness. In the second article, the interplay between structure and agency is explored by presenting strategies for institutional change among association members. Findings suggest that tourism-based poverty alleviation is an opportunity-dependent and opportunity-generating process, influenced by both the institutional context and the specific strategies of reflexive actors to improve individual or collective functioning. Finally, article three compares national-level discourses of development in Peru to local perceptions of poverty and tourism practice outside Cuzco. Findings suggest that a great deal of overlap exists between local perceptions and income first, needs first, and rights first approaches to development. This overlap is observed through specific references to poverty as a lack of money, work, education, or control over tourism in the Cuzco region.

The findings presented here reinforce previous appeals for both industry and government leaders to more effectively incorporate emic (local) perceptions and strategies into tourism policies effecting indigenous communities. Findings may hold broader practical and theoretical significance for Pro-Poor Tourism (PPT) practice and research, as well. In particular, linking local perceptions and strategies for change to the frameworks presented may support efforts to understand the complex process by which ‘opportunities’ are unlocked for local people – drawing attention to the agency and calculation of reflexive actors, to the selective influence of institutional configurations, and to the essentiality of indigenous voices and rights in pursuing tourism-based development at all levels of the socio-political spectrum.

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*Within these plantations of God, a decorum and sanctity reign, a perennial festival is dressed,
and the guest sees not how he should tire of them in a thousand years.*

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LIST OF ACRONYMS

Acronym	English	Spanish
AUD	Australian dollar	
BBC	British Broadcasting Corporation	
CAPA	Center for Asia Pacific Aviation	
CBT	Community-based Tourism	Turismo comunitario
CCC	Center for Collaborative Conservation	
CSU	Colorado State University	
DIRCETUR	Regional Department of Foreign Commerce and Tourism	Dirección Regional de Comercio Exterior y Turismo
GDP	Gross Domestic Product	
GII	Gender Inequality Index	
HDI	Human Development Index	
IMF	International Monetary Fund	
INEI	National Institute of Statistics and Informatics	Instituto Nacional de Estadística e Informática
IWGIA	International Work Group for Indigenous Affairs	
MDG	Millennium Development Goal	
MINCETUR	Ministry of Foreign Commerce and Tourism	Ministerio de Comercio Exterior y Turismo
MOU	Memorandum of Understanding	
MPI	Multidimensional Poverty Index	
NGO	Non-governmental Organization	
OECD	Organization for Economic Co-operation and Development	

Acronym	English	Spanish
PNTRC	National Rural/Community-Based Tourism Program	Programa Nacional de Turismo Rural/Comunitario
PPT	Pro-poor Tourism	
PRA	Participatory Rural Appraisal	
PROMPERU	Promotion Commission of Peru	Comisión de Promoción del Perú
PRSP	Poverty Reduction Strategy Papers	
RAP	Rapid Assessment Process	
RQI	Rapid Qualitative Inquiry	
RRA	Rapid Rural Appraisal	
SAP	Structural Adjustment Papers	
SDG	Sustainable Development Goal	
SNV	Netherlands Agency for International Development	
ST-EP	Sustainable Tourism Eliminating Poverty	
TRC	Rural/community-based tourism	Turismo rural/comunitario
TUI	Touristik Union International	
UN	United Nations	
UNDP	United Nations Development Program	
UNDESA	United Nations Department of Economic and Social Affairs	
UNGA	United Nations General Assembly	
UNPFII	United Nations Permanent Forum on Indigenous Issues	
UNWTO	United Nations World Tourism Organization	

Acronym	English	Spanish
USAID	United States Agency for International Development	
USD	United States dollar	
WCED	World Commission on Environment and Development	
WTO	World Trade Organization	
WTTC	World Travel and Tourism Council	

CHAPTER I

INTRODUCTION

PROJECT BACKGROUND

Tourism has received increased attention as a potential tool for poverty alleviation in recent decades (Holden, 2013; Mitchell & Ashley, 2010). To be sure, governments and development organizations around the world are adopting tourism-based approaches for pro-poor development with ever-increasing intentionality (Klytchnikova & Dorosh, 2013; Scheyvens, 2011).

My initial graduate coursework at Colorado State University (CSU) in 2011 made me aware of these trends in international development and tourism research. As my interest in the tourism-poverty nexus grew, I began to consider how I might procure funding to research the pro-poor impacts of tourism operations among local people in *coastal communities* such as those in Zanzibar or the Seychelles.

When my proposal to a lucrative international travel company – Intrepid Travel of Melbourne, Australia – was approved in the fall of 2011, it was decided relatively quickly that my research would not concern coastal communities at all. Instead, the research would involve the Quechua people visited by Intrepid groups in the Andean highlands of Peru's *Valle Sagrado* (Sacred Valley) between Cuzco and Machu Picchu. This seemed to be a better fit for Intrepid (due to the higher volume of visitors to the region), for me (due to my Spanish proficiency), and for the communities (due to the level of tourism-based development being pursued by the Peruvian state and by many rural communities in the Cuzco region).

Through ongoing Skype and e-mail conversations with Intrepid's Responsible Travel Manager, Jane (based in Melbourne), and with Intrepid's regional manager, Fernando (based in

Cuzco), project objectives were established. Two questions were to be addressed for Intrepid Travel:

- 1) In addition to economic benefits, what changes have occurred as a result of Intrepid trips in the selected communities?
- 2) How are Intrepid trips addressing/meeting community interests or concerns?

Before a Memorandum of Understanding (MOU) was finalized in early 2013, letters describing the potential project and gauging local interest were written and shared with the heads of four tourism associations working with Intrepid Travel in four Valle Sagrado communities: *Chichubamba, Amaru, Sacaca, and Qorqor*. In response to the letters, association members expressed their interest (consent?), and the project moved forward.

By agreeing to work in these communities, I was denied any hope of experiencing a tropical/temperate marine climate by the ocean, which I had initially desired. At 9,000' to 13,000' in elevation, the Valle Sagrado experiences heavy rains in the warmer months (i.e., December through March) and significant changes in daytime and nighttime temperatures throughout the year (40 degree drops in temperature are not uncommon in the colder, drier months of June and July). I would soon learn that the frigid temperatures, unique local foods (e.g., Guinea pig and corn beer), and rural lifestyles of the region – while pushing me to a personal brink of bare-bones survival – were naught but the norm for local people of Inca-Spanish descent whose company I would come to enjoy so much.

Before the start of the project, my personal goal in braving the elements for three to four weeks in each community between June and December of 2013 began to coalesce. Aligning with Freire's (1970) suggestion that emancipation must come from within, my own purpose would be to encourage concientization through dialogue in each of the four communities. In particular, I

hoped to collaborate with members of each tourism association as they 1) considered what tourism has meant for them, and 2) voiced specific interests or concerns regarding their interactions with Intrepid. In the end, if the project helped local people experience unlocked opportunities and increased benefits, based on their own perceptions and interests, I would deem my efforts both meaningful and, potentially, significant for those involved. This dissertation seeks to evaluate local perceptions of poverty alleviation through tourism in these four communities by focusing on local views, interests, strategies for institutional change, and the infiltration of development discourses into rural Cuzco.

INDIGENOUS PEOPLE AND POVERTY

With social, cultural, economic, and political systems “that are distinct from those of the dominant societies in which they live” (UNPFII, 2006a, p. 1), an estimated 250-350 million indigenous peoples currently comprise over 5,000 groups living in 70 different countries (Hall & Patrinos, 2012). Careful to avoid categorical definitions of what it means to be indigenous, the United Nation’s Permanent Forum on Indigenous Issues (UNPFII) does list several characteristics that indigenous people around the world may share. These characteristics include:

- Self- identification as indigenous peoples at the individual level and accepted by the community as their member
- Historical continuity with pre-colonial and/or pre-settler societies
- Strong link to territories and surrounding natural resources
- Distinct social, economic or political systems
- Distinct language, culture and beliefs
- Form non-dominant groups of society

- Resolve to maintain and reproduce their ancestral environments and systems as distinctive peoples and communities (UNPFII, 2006a, p. 1)

The literature on poverty and development suggests that, internationally, poverty is indeed more prevalent among indigenous than non-indigenous people. Most of these studies are based on Western views of what poverty may be (e.g., living on less than USD \$2 per day), although there is a growing recognition that measures of poverty must attend to both local and external epistemologies (UNDESA, 2009). The United Nations has defined absolute or extreme poverty as

...a condition characterized by severe deprivation of basic human needs, including food, safe drinking water, sanitation facilities, health, shelter, education and information. It depends not only on income but also on access to services.

(United Nations, 1995)

One approximation suggests that indigenous people comprise 15% of the world's poor (UNFPPII, 2006b), though they comprise only 5% of the world's total population (IWGIA, 2008). In Latin America – home to an indigenous population of approximately 29 million (Stephens, Nettleton, Porter, Willis, & Clark, 2005) – poverty rates also appear higher among indigenous people. Just before the United Nations declared that December 10, 1994 would mark the start of the International Decade of the World's Indigenous Peoples, a study by Psacharopoulos & Patrinos (1994) came out that systematically compared living standards between indigenous and non-indigenous people in four Latin American countries, including Peru. The study found “evidence that indigenous people suffered far worse socioeconomic conditions than the population as a whole” in terms of education, living conditions, health, income, and employment (Hall & Patrinos, 2006, p. 1).

Studies like these increasingly consider both economic and non-economic deprivations (e.g., limited access to health care or education) when evaluating poverty. Acknowledging the multidimensional nature of poverty in this fashion has led some to suggest that new approaches be taken for assessing the prevalence of or reasons for poverty among indigenous people. For example, Maru and Chewing (2011) recently proposed that conceptualizing poverty in terms of Sen's (2000) capability approach might allow for the consideration of contextual factors to more effectively guide development policies aimed at poverty alleviation in Australia. They write:

If one employs the capability approach that considers poverty not only as a low level of the means (e.g., income, assets) to achieve outcomes, but as a failure in basic freedom to be and do what one values, then many more indigenous people may be categorized as suffering persistent poverty, as many persistently depend on the welfare state. To be poor is to lack effective freedom of choice in how to live one's life. Such a broader account of basic freedom can also pick up inabilities as a result of alcohol and substance abuses as well as abuses against women and children. (p. 33)

Regardless of how poverty is defined or what approach is employed to assess its alleviation, it seems difficult to reconcile the ostensible fact that most studies on poverty (or on tourism-based poverty alleviation) among indigenous people are fueled by non-indigenous decision-makers. This begs the question: are studies of indigenous poverty representative of the oft-lamented historical/ongoing colonization of marginalized groups (e.g., indigenous people) by hegemonic forces (e.g., researchers, development organizations, travel companies, or government)? Or is it possible for evaluations of poverty to be driven by the interests and perceptions of indigenous people?

It is apparent that indigenous people working in tourism (such as those working with Intrepid Travel in the Valle Sagrado) may not possess the same interest in evaluating tourism-based development as, say, the Peruvian government or travel businesses. However, it could be assumed that indigenous people possess a strong interest in determining how tourism occurs, if at all, in their respective communities. By viewing poverty alleviation in terms of enhanced freedoms or unlocked opportunities based on local perceptions and interests, evaluations of tourism-based poverty alleviation may become less about addressing external goals and more about emphasizing indigenous interests and rights to self-determination (Smith, 1999). The rationale for this dissertation hinges on such a conceptualization of poverty in terms of enhanced freedoms or unlocked opportunities as described by local people (Sen, 2000).

Given the burgeoning interest in tourism in Peru among government leaders, development organizations, and indigenous people, understanding local views of tourism and tourism-based change represents a salient issue in need of further study. While the rural poor in the Andean highlands of southern Peru often choose to migrate to urban areas rather than wait for new opportunities to be unlocked through tourism (Zoomers, 2008), many have chosen to remain, pursuing alternative sources of income by forming tourism associations and receiving visitors within their communities. To understand the context influencing these decisions, an overview of tourism in Peru is now provided.

TOURISM IN PERU

On a global scale, the tourism industry rivals or exceeds that of oil exports, automobiles, or food products, generating USD \$1.3 trillion in export earnings in 2012 and seeing 1.1 billion international tourist arrivals in 2013 (UNWTO, 2014). The sheer size of the industry and its

potential for supporting economic growth has led many countries to pursue tourism-based strategies to alleviate poverty within their borders. In Latin America, where tourist arrivals rose by about 50% between 1995 and 2007 (Fayissa, Nsiah, & Tadesse, 2011), studies suggest that active promotion of the tourism sector may be positively correlated with poverty alleviation in terms of economic growth and human development (i.e., longevity, knowledge, and standard of living; Croes, 2012; Jiang, DeLacy, Mkiramweni, & Harrison, 2011; Klytchnikova & Dorosh, 2013).

In Peru, tourism has become explicitly incorporated into the national strategy for growth and development. In the rewriting of its constitution in 1993, the Peruvian government created the Commission of Promotion of Peru (PROMPERU) to publicize, both domestically and abroad, the nation's image as a global tourism destination. With improved political and economic stability since the early 1990s, including three successful presidential transitions in 2001, 2006, and 2011 (USAID, 2012), the nation saw a 380% increase in international tourist arrivals between 1995 and 2010 (UNWTO, 2012). Foreign tourism in Peru currently generates an estimated USD \$3.8 billion (WTTC, 2013), with nearly 3.2 million international tourists visiting the nation in 2013 (Peru This Week, 2014).

With indigenous people making up as much as 50% of Peru's population of 27 million (European Commission, 2007), Peru's Ministry of Foreign Commerce and Tourism (or MINCETUR) began a rural and community-based tourism campaign in 2007 to support national development efforts. The objective of the so-called National Rural/Community-Based Tourism Program (*Programa Nacional de Turismo Rural/Comunitario*, or PNTRC) has been "to contribute, from rural areas, to the development of sustainable tourism as a tool for socio-economic development in Peru" (MINCETUR, 2014, para. 4). As part of this program, the

Peruvian government has financed and overseen an annual rural/community-based tourism conference every year since 2007, providing free training in tourism management and entrepreneurship for indigenous people throughout the country.

Government support of tourism development in rural Peruvian communities has appeared to unlock opportunities for indigenous people through an increased command over economic resources. Between 2007 and 2014, the PNTRC has purportedly contributed to:

- Support for the creation and development of 72 community-based tourism associations/businesses across 16 regions of the country (including Cuzco)
- A 12% increase in tourism employment in rural areas (predominantly for women in business management)
- The generation of an average of 53 nuevo soles (USD \$20) per family in supplementary tourism income
- An 18% annual increase in visitor numbers to rural areas and a 13% annual increase in economic growth
- The generation of 7 million nuevo soles (USD \$2.59 million) for rural areas (MINCETUR, 2014).

These numbers suggest that many indigenous families have benefitted, at least economically, by the PNTRC. However, the numbers tell but a small part of the diverse socio-political arrangements and local realities influencing indigenous people's involvement in tourism or their perceptions of tourism impacts. More holistic analyses based on local interests and perceptions may support efforts to better understand whether tourism is in fact supporting the kinds of changes local people actually desire. Such analyses may be especially valuable for guiding tourism business and development policies in Peru's Valle Sagrado, where the

construction of a new international airport outside Cuzco is sure to increase the already burgeoning number of international visitors to the region. With significant changes and opportunities on the horizon for indigenous people living in the Valle Sagrado, a number of issues appear increasingly salient for evaluating regional, tourism-based development efforts. The specific issues that this dissertation seeks to address are now presented.

STATEMENT OF THE PROBLEM

As growing swaths of the international hospitality and tourism industry seek to align their business practices with the ideals of sustainable development (e.g., social justice, economic growth, environmental conservation, and so on.), and as governments continue welcoming tourism-based strategies for economic growth, attempts to measure the contribution of the industry to poverty alleviation efforts are becoming increasingly salient in both public and private spheres. At the same time, given the diverse conceptualizations of what poverty actually is and how it can be measured, “the relation between tourism and poverty alleviation has been, and will be, constantly debated, especially in international development cooperation (Van de Mosselaer & Van der Duim, 2013, p. 51).

In the context of indigenous tourism, assessing tourism’s contribution to the alleviation of poverty may be especially problematic. Indigenous tourism has been described as existing when “indigenous people are directly involved either through control and/or by having their culture serve as the essence of the attraction” (Butler & Hinch, 2007, p. 5). In addition to specific concerns about defining or measuring poverty, questions arise about the legitimacy or overarching purpose of studies on tourism-based poverty alleviation among indigenous people. As Holden (2013) asks, “Is the poverty reduction project simply one of humanitarianism, with an

ethical imperative to do the ‘right’ thing as a consequence of an empathy of universal suffering, or is it more representative of ideological, political and economic interests?” (p. x).

Studies have acknowledged the potential for tourism to generate benefits and to alleviate poverty among indigenous people (Donohoe & Blangy, 2013; Koutra & Edwards, 2012; Spenceley & Meyer, 2012). However, local voices are rarely emphasized in studies of poverty alleviation through tourism, let alone tourism studies in general (Stronza, 2008). As such, many claims for tourism’s potential to alleviate poverty are disproportionately based on outsider views of poverty and the need for external, institutional transformation rather than on the expressed rights and interests of local people (Scheyvens, 2011). Because indigenous people in the Valle Sagrado rarely see themselves as ‘poor’ – considering lonely travelers to be worse off than they are, in many cases (Zoomers, 2008) – it is argued here that poverty alleviation may be more effectively conceptualized in a relative sense (i.e., in terms of local views of tourism-based change).

Pursuing institutional reform to maximize positive changes for the poor through tourism has been a primary focus of an area known as pro-poor tourism (PPT). PPT has been described as “an overall approach specifically focusing on unlocking opportunities for the poor through tourism” (Van de Mosselaer & Van der Duim, 2013, p. 44). While a laudable notion, PPT has received much criticism for not adequately addressing structures of power in tourism (Chok, Macbeth, & Warren, 2007; Mowforth & Munt, 2009), for overlooking the “most poor” in communities (Saarinen & Rogerson, 2014, p. 26; Goodwin, 2008), and for dubbing any venture pro-poor that generates net benefits for the have-nots, even if it generates *greater* benefits for local elites or foreign entities (Hall, 2007; Harrison, 2008).

Given current trends and issues regarding pro-poor and indigenous tourism, the problem being addressed in this dissertation is multifaceted. While an increasing number of studies consider the tourism-poverty nexus as it relates to indigenous people (cf., Whyte, 2010; Ypeij, 2012; Zoomers, 2008), there is a dearth of studies emphasizing local voices, perceptions, and interests related to indigenous people's involvement in tourism processes. In addition to the importance of emic (i.e., locally meaningful) factors, there also remains a need for pro-poor tourism scholars to clarify definitions and measures of poverty in deciding who the poor may be (Schilcher, 2007) or how poverty itself is conceived. Finally, while many pro-poor tourism studies allude to unlocked opportunities for the poor based on Sen's (2000) capabilities approach to development, there are few studies, if any, that attempt to link qualitative measures of tourism-based poverty alleviation to Sen's work more explicitly.

RESEARCH QUESTIONS AND PURPOSE

Based on the issues presented above, this dissertation aims to address several questions of relevance not only for pro-poor and indigenous tourism research, but also for Intrepid Travel and the four communities involved in this project. The questions are as follows:

1. Are community-Intrepid interactions linked to processes of empowerment for local people, and what factors are influencing those processes?
2. How might local strategies for institutional change (influencing tourism associations and their interactions with Intrepid) contribute to tourism-based poverty alleviation in communities?
3. How do development discourses in Peru compare with local views of poverty and tourism practice among rural communities outside of Cuzco?

4. Based on local views and project outcomes and findings, have community-Intrepid interactions contributed to poverty alleviation for local people?

Specifically, the purpose of this dissertation research is to understand and describe local perceptions of tourism-based poverty alleviation among the four communities visited by Intrepid groups, located outside the ancient Inca capital of Cuzco, Peru. At this stage in the research, tourism-based poverty alleviation will be generally viewed as a relative and site-specific concept encompassing any process by which individual or collective functioning is enhanced through the direct or indirect influences of tourism.

OBJECTIVES OF THE STUDY

This dissertation builds on previous contributions from diverse fields (namely, tourism, anthropology, and sociology) in an attempt to offer practical and theoretical insights concerning indigenous tourism development and research. An explicit focus on the tourism-poverty nexus seeks to build on current approaches to evaluating whether and how indigenous people may experience unlocked opportunities and freedom enhancement through their involvement in tourism.

Identifying *whether* the involvement of indigenous people in tourism has alleviated poverty depends on several factors. First, it depends on whose definition of poverty is being used (Goodwin, 2007). It may also require comparing local views of positive and negative change stemming from tourism. In other words, as suggested by pro-poor tourism practitioners and proponents, it is important to consider whether tourism generates “net benefits” for the poor (Bennett, Roe, & Ashley, 1999, p. 6).

Evaluating *how* indigenous people may experience unlocked opportunities through tourism requires additional considerations. While external institutional dynamics affect the opportunities available for the poor to work in and benefit from tourism, poor people themselves are not without influence in determining the ways they may become involved in tourism or the extent of positive or negative change they may experience – individually or collectively – as a result of such involvement. Stronza and Durham (2008) suggest that “the debate is currently not *whether* local communities should be involved in the development of tourism to their area, but *how* they should be involved” (p. 4). As such, studies on how tourism-based poverty alleviation occurs should consider the opportunities available for local people to shape a given tourism arrangement, and how resulting changes may increase benefits to those involved.

The objectives of this dissertation relate to these considerations. Specifically, this research seeks:

1. To incorporate local interests and views of tourism in evaluating whether and how Intrepid visits have alleviated poverty in the Valle Sagrado communities of Chichubamba, Amaru, Sacaca, and Qorqor.
2. To analyze expressions of power and related processes of empowerment linked to Intrepid visits and Peru’s community-based tourism program in each of these communities.
3. To explore the link between structure and agency in processes of poverty alleviation through institutional change in an indigenous tourism context.
4. To compare and contrast discourses of development in Peru with local perceptions of poverty and tourism practice in the Cuzco region.

5. To reflect on participatory methodologies for more effectively incorporating local views and interests into PPT research involving indigenous communities.
6. To provide Intrepid Travel and respective tourism associations summaries of study findings, including recommendations for Intrepid and associations based on local, tourism-related perceptions and interests.

RESEARCH CONTEXT

Peru possesses a tremendous array of natural, cultural, and archaeological resources, making it an ever more popular site for so-called ecotourism, adventure tourism, and heritage or indigenous tourism (Mitchell & Reid, 2001). It has been described as having the most diverse population of bird species (more than 1,600) and the third most diverse population of mammals in the world (Blackstone, 1995). Its mountains, rivers, and rainforests have led to the development of countless trekking, climbing, rafting, and other adventure tourism-type excursions. Sites of significance such as Machu Picchu have lured increasing numbers of tourists to Peru, and a burgeoning interest in the indigenous heritage of the region has led to appropriation and commodification of traditional textilism (Lyon, 2012), spirituality (Gomez-Barris, 2012), archeology (Herrera, 2013), and other aspects of Quechua culture.

Most of Peru's indigenous tourism development has occurred in and around the Valle Sagrado, located between the city of Cuzco and the ruins of Machu Picchu in the south central highlands (Figure 1.1). This area represents what was once the heart of the Inca Empire – an expansive kingdom that extended from Colombia to Chile between the 12th and 16th centuries. The empire was once connected by over 22,500 kilometers of Inca highways, but the so-called

Inca Trail between Cuzco and Machu Picchu has become the focal point for modern-day trekkers – attracting nearly 50,000 visitors annually (Maxwell, 2012).



Figure 1.1.
Peru, Cuzco, and Machu Picchu (Ascend Adventure Travel, 2012).

The ‘discovery’ of Machu Picchu by Hiram Bingham of Yale University in 1911 – quickly followed by an expansive report on the site by National Geographic in its April, 1913 issue – stirred the ‘geographical imaginations’ of people everywhere and began attracting tourists to the region as early as the 1920s (Massey, 2006; Gomez-Barris, 2012). By the 1950s – after the Peruvian government had built up some much-needed infrastructure in the area – visitors began to arrive “en masse, transforming the nation’s heritage into raw material for tourist consumption” (Gomez-Barris, 2012, p. 4).

The number of visitors to Machu Picchu topped one million for the first time in 2012 (Peruvian Times, 2014). Most of these visitors pass through the city of Cuzco (population of 413,000 in 2013; INEI, n.d.), where approximately 1,200 travel and tourism companies are presently registered and serving visitors (DIRCETUR, 2013). In view of upward trends in tourist arrivals to the region, the construction of a new international airport has begun just 30 minutes outside Cuzco in the town of Chinchero. This development will afford visitors easier access to indigenous communities located between Cuzco and Machu Picchu, generating drastic changes in the area's political/geographical landscape, economy, and culture.

Whether these changes enhance or inhibit freedoms for local people will depend heavily on the policies implemented by the public and private sectors. Assessing whether the actions and interactions of communities within specific tourism arrangements lead to unlocked opportunities for local people will become increasingly salient for travel companies and local governments pursuing a pro-poor agenda. Intrepid Travel is one company that has sought to assess the pro-poor impacts of its tours in the area while pursuing ways to better incorporate the rights and interests of local people into its business practices.

Intrepid Travel, headquartered in Melbourne, Australia, is one of the many companies operating in the Cuzco region. After a 2011 merger with Touristik Union International (TUI) of Germany, the company is now part of the PEAK Adventure Group – said to generate annual revenues of circa AUD \$400 million while providing tours for an estimated 350,000 passengers across all seven continents (Travel Pulse, 2011). Intrepid alone has set up local partnerships or joint ventures in 22 nations – employing close to 1,000 people globally and emphasizing small-group, grassroots, responsible travel throughout its operations (Intrepid, n.d.). Table 1.1 outlines Intrepid's guiding principles for interactions with remote communities.

Traveling from Cuzco to Machu Picchu, Intrepid groups are limited to 16 passengers and are led by a local (Peruvian) guide. At the time of this study, Intrepid had working agreements with four rural, Quechua communities situated in the region. These communities were *Chichubamba, Amaru, Sacaca, and Qorqor*, each located within a 1.5 hour drive from Cuzco and

Table 1.1.

Intrepid Travel's principles for operating trips to remote village communities (select items)¹

Principle	Description
<i>Shared decision-making and ownership</i>	Working with community members and consulting local representative organizations for the shared development, operation, and ownership of all programs involving Intrepid groups
<i>Key partnerships</i>	Identifying community members who can be directly involved in the organization and leadership of Intrepid activities within their community by working with Intrepid guides/staff
<i>Cultural sensitivity</i>	Encouraging community members to present their community in their own way for visiting Intrepid travelers; this could be through talks, village walks, cultural demonstrations or traditional craft markets
<i>Equal opportunity for involvement</i>	Giving all local people an opportunity to be involved in at least some of the activities completed by Intrepid groups in the communities; ensuring that men and women have an equal chance to be actively involved in all activities
<i>Meaningful interaction</i>	Providing local people and Intrepid travelers opportunities to engage in activities that encourage meaningful interaction and culture sharing
<i>Individual and collective benefits</i>	Contributing to both household- and community-level benefits (economic and otherwise) with each Intrepid visit
<i>Infrastructure development</i>	Using existing community facilities as much as possible (for accommodations, bathrooms, washing, etc.); however, Intrepid Travel or a local operator will pay for the development of such infrastructure if existing facilities are not able to cope
<i>Small-group tours</i>	Limiting the size of Intrepid groups to 16 travelers, or breaking up larger groups into smaller ones when visiting a remote community

1. (Crouch, J., personal communication, March 25, 2013)

ranging in size from 50 to 220 families (Figure 1.2). Traditional livelihoods in these communities include agriculture (potato, barley, fava beans, and quinoa are commonly grown), animal husbandry (cattle, sheep, and Guinea pig are commonly raised, traded, and sold), floriculture, textiles, and ceramics. Other livelihoods include transportation, public works, merchandising, and tourism.



Figure 1.2. Location of the four communities working with Intrepid in Peru's Valle Sagrado (adapted from *Trekking Peru, 2014*).

Each of these communities has at least one tourism association comprised of individuals who have become (and remained) involved in tourism. Intrepid Travel works with only one tourism association in each community such that, upon arrival, Intrepid passengers interact with only those individuals who are part of the association with which Intrepid has established a working agreement. During their visit, passengers eat a locally prepared lunch, learn about and

potentially participate in the indigenous people's way of life (e.g., tilling soil, feeding the Guinea pigs, etc.), and have the opportunity to purchase textiles, crafts, or other goods from members of the tourism association with which Intrepid works. Visits to these communities by Intrepid groups never entail overnight stays; they occur between one and four times per week (depending on the community), take place around lunch, and last for two to three hours at a time.

STRUCTURE OF THE DISSERTATION

This dissertation is divided into six chapters. Chapter II continues with a review of the literature related to tourism, development, and poverty. Put simplistically, the subsequent three chapters are presented as three articles analyzing tourism-based poverty alleviation at the individual level (Chapter III), the local institutional level (Chapter IV), and the regional level (Chapter V). Finally, a conclusion is presented in Chapter VI to provide closing thoughts on limitations of this research, its practical and theoretical significance, and potential future studies.

Table 1.2 links each research question to the dissertation objectives and to the conceptual and/or theoretical focus of each of the chapters.

Table 1.2.

Linking research questions and objectives to dissertation theories applied in respective articles/appendices.

Research Question	Objectives	Conceptual/Theoretical Focus	Article
1. Are community-Intrepid interactions linked to processes of empowerment for local people, and what factors are influencing those processes?	1, 2, 5	Community-based tourism, power/empowerment, local perceptions, Sen's (2000) capability approach	Article 1 (Chapter III)
2. How might local strategies for institutional change (influencing tourism associations and their interactions with Intrepid) be linked to tourism-based poverty alleviation?	3, 5	Local perceptions, Jessop's (2001, 2008) strategic-relational approach to institutional analysis, Sen's (2000) capability approach	Article 2 (Chapter IV)
3. How do development discourses in Peru compare with local views of poverty and tourism practice among rural communities outside of Cuzco?	4, 5	Local perceptions, development, Copestake's (2008, 2011) development discourse typology in Peru	Article 3 (Chapter V)
4. Based on local views and project outcomes and findings, have community-Intrepid interactions contributed to poverty alleviation for local people?	1 – 6	Indigenous tourism; local perceptions; Jessop's (2001, 2008) strategic-relational approach to institutional analysis; Sen's (2000) capability approach; Copestake's (2008, 2011) development discourse typology in Peru	Articles 1-3 (Chapters III, IV, and V); Appendices

CONCLUSION

Since the arrival of the Spanish in Peru in 1528, it is possible that change has been the only constant for the descendants of the Quechua-speaking people of the Andean highlands. Such instability appears to be much at odds with the nature of indigenous Peruvians. As the historian Prescott (1877) explains, under Inca rule, “those passions which most agitate the minds

of men found no place in the bosom of the Peruvian. The very condition of his being seemed to be at war with change” (p. 64).

Still, significant changes are likely to continue for indigenous and mestizo communities situated outside the ancient Inca capital of Cuzco as a result of the burgeoning influx of international visitors and the array of socio-political processes influencing development and tourism practice in the region. Specific policies encouraging an increased presence of foreign companies – promulgated through what seems a natural course of events, and legitimized through an effective operationalization of neoliberal discourse (e.g., privatization, deregulation, etc.) – may continue generating resistance from local people against tourism and the Peruvian state. At the same time, an increased emphasis on associational life in Peru may provide many indigenous communities with enhanced individual and collective opportunities, leading to an improved quality of life and well-being as more and more people become involved in tourism.

Being able to evaluate local perceptions of these changes, stemming either from interactions between Intrepid Travel and communities or from broader tourism practices, may contribute to better understanding tourism’s poverty alleviating potential in the Valle Sagrado. This dissertation thus aims to understand and describe local perceptions of poverty alleviation through tourism, addressing current conceptual, theoretical, and practical issues prevalent in PPT studies while supporting the interests and rights of those living in Chichubamba, Amaru, Sacaca, and Qorqor.

CHAPTER II

REVIEW OF THE LITERATURE

INTRODUCTION

As a massive global industry, tourism has become increasingly promoted as a viable, alternative livelihood for people living in rural, poor, peripheral, indigenous or developing communities around the world (Holden, 2013; Scheyvens, 2011). Internationally, billions of dollars have been set aside to support development efforts that incorporate tourism-based projects aimed at reducing poverty (UNWTO, 2007; European Commission, 2003; Saarinen & Lenao, 2014; World Bank, 2006).

Despite the size of the industry and diverse efforts to tackle global poverty through tourism, attempts to measure the effects of such efforts among indigenous people, in particular, are wrought with theoretical and conceptual challenges. Many concerned with the tourism-poverty nexus continue to wrestle with definitions of poverty (Goodwin, 2007), with effectively comparing positive and negative changes resulting from pro-poor tourism (PPT) initiatives (Saarinen & Rogers, 2014), with how institutional configurations may be transformed to generate greater benefits for the poor (Ashley, Goodwin, & Roe, 2001; Erskine & Meyer, 2012), and with uncovering issues of power in discourses of development (Bebbington, Mitlin, Mogaladi, Scurrah, & Bielich, 2010; Mowforth & Munt, 2009). The prevalence of these challenges among practitioners and academicians, however, has not negated the ostensible lure of tourism as a favorable livelihood option for the poor themselves. Scheyvens (2011) writes:

...the promise of tourism as a tool for poverty alleviation is clearly compelling and the potential benefits extend well beyond the economic sphere...As such it would be negligent to cynically dismiss tourism's potential here, and this may also do a disservice

to the millions of poorer people around the world who, in struggling to enhance their well-being, are looking to tourism as an area of promise. (p. 3)

The lure of tourism appears significant for indigenous communities in the rural highlands of Peru (e.g., outside of Cuzco), where poverty rates are significantly higher than elsewhere in the country (Escobal & Ponce, 2011). While the rural poor in the Andean highlands often choose to migrate to urban areas rather than wait for new opportunities to be unlocked through tourism (Zoomers, 2008), many have chosen to remain, pursuing alternative sources of income by forming tourism associations and receiving visitors within their communities. In spite of such collective action, the extent to which the burgeoning influx of visitors to the region has led to significant benefits for rural villages remains questionable (cf. Piazza, 2014).

At the very least, the mounting presence of tourism in Peru's *Valle Sagrado* (Sacred Valley) is generating significant change in the region. To help evaluate these changes, this chapter attempts to provide a review of the salient literature related to the complex interplay between development, tourism, and poverty. The review is divided into three major sections. The first provides an overview of the apparent linkages between development and tourism, beginning with a history of development practice, continuing with a brief summary of discourses of development, and closing with a discussion of PPT as a development tool. The second and third sections highlight respective emic and etic approaches and theories related to measuring and analyzing aspects of tourism-based poverty alleviation among indigenous people. More specifically, the second section focuses on emic considerations by providing an overview of indigenous tourism practice and research, local perceptions of tourism and poverty, and a description of Beebe's (2009; 2014) Rapid Qualitative Inquiry. The third section focuses on etic considerations by describing two theories linked to PPT studies: Jessop's (2008) strategic-

relational approach to institutional analysis, and Sen's (2000) capability approach to development.

DEVELOPMENT AND TOURISM

Overview of Development

Explicit and increased attention on development in the post-World War II era can be traced to historical processes related to attempts at measuring and eradicating poverty. A study conducted by Rowntree of York, published in 1901, was one of the first to create a standard for measuring poverty for individual families (Maxwell, 1999). Foucault (1978) alludes to national-level measures of poverty by highlighting governments' interests in characterizing and categorizing people in terms of demographics, consumption, and health to drive state agendas for economic growth, welfare legislation, and other matters of 'national' importance. Over time, nation-states have used population characteristics such as these to establish "a form of surveillance and control as attentive as that of the head of a family over his household and his goods" (Foucault, 1978, p. 92).

After World War II, supranational organizations like the World Bank, the International Monetary Fund (IMF), and the World Trade Organization have been influential in producing and overseeing measures of poverty at the international level. Predominant post-war approaches treated development as a linear process and inevitable outcome of economic growth (Cremin & Nakabugo, 2012). Such views culminated with the rise of neoliberalism in the 80s, initially embodied by the Washington Consensus and subsequently criticized as "a transnational political project aiming to remake the nexus of market, state, and citizenship from above" (Wacquant, 2010, p. 213). The ensuing influence of neoliberalism on development was exemplified by the

use of Structural Adjustment Programs (SAPs) by which ‘underdeveloped’ nations agreed to stabilize their economies to receive ongoing financial support from the World Bank and IMF and to attract foreign inward investment (Holden, 2013).

Around the same time, alternative approaches to development began to emerge that emphasized participatory methodologies and greater local-level ownership over development processes. Rapid Rural Appraisal (RRA), for example, was an approach implemented in the late 70s as a way for urban-based politicians to quickly evaluate rural tourism development based on community perceptions (de Negri, Thomas, Ilinigumugabo, Muvandi, & Lewis, 1998). This primarily information-extractive process gave way to Participatory Rural Appraisal (PRA) in the early 80s as non-governmental organizations (NGOs) began to appreciate “local people’s *capabilities* to plan and implement their own projects” (de Negri et al., 1998, p. 13; Chambers, 1992). Over time, elements of PRA have both influenced and been influenced by a variety of development and research methodologies, including community driven development (Casey, Glennerster, & Miguel, 2011; Scarlato, 2013), asset-based approaches (Kretzmann & McKnight, 1993), community-led visioning processes (Bopp & Bopp, 2006), and local ownership over team-based data collection and analysis (Beebe, 2014).

By the late 90s, broad emphasis on greater local control within alternative and sustainable development paradigms seemed to sway policies espoused by supranational institutions such as the United Nations (UN) and IMF (Pelenc, Lompo, Ballet, & Dubois, 2013; WCED, 1987). As SAPs appeared to enhance rather than alleviate poverty, they were replaced in the late 90s by Poverty Reduction Strategy Papers (PRSPs) (Willis, 2005). With the implementation of the Millennium Development Goals (MDGs) by the UN in 2000, a ‘New Poverty Agenda’ emerged

that placed poor people at the center of development and devolved development strategizing to national-level institutions (IMF, 2014).

An important component of this agenda has been the use of the Human Development Index (HDI) to conduct more robust analyses of global poverty in terms of health, education, income, gender issues, and living standards. Coupled with other indices like the Multidimensional Poverty Index (MPI) and the Gender Inequality Index (GII), the HDI has been used by the United Nations Development Program (UNDP) since 1990, with 187 countries being assessed in 2014 (UNGA, 2000; World Bank, 2005; UNDP, 2014). This approach represents a break from traditional measures of national progress such as GDP, highlighting the increased contextualization of development within multidimensional and subjective characteristics of poverty. As the United Nations (UN) plans to usher in its Sustainable Development Goals in 2015, Costanza et al. (2014) suggest that measures of development should move beyond measures of poverty, considering “how ecology, economics, psychology and sociology collectively contribute to establishing and measuring sustainable well-being” (p. 285). Here, emphasis would be placed not only on universal human rights and views of poverty and well-being that may be generalizable on an international scale, but also on culturally relevant and context-specific views emphasizing local control and participation in development.

While PRSPs and the ‘New Poverty Agenda’ have called for greater local ownership over and involvement in decision-making processes related to poverty reduction (e.g., through more broad participation from civil society), approaches to development espoused by the so-called ‘Post-Washington Consensus’ have been criticized for being mere extensions of neoliberal ideology rather than alternatives to it (Scheyvens, 2007; Mowforth & Munt, 2009; Power, 2004). Craig and Porter (2002), for example, suggest that the PSRPs themselves are “a professedly

comprehensive, ‘country-driven’ approach to poverty, combining powerful econometric and ethnographic method with a battery of participatory techniques and a sharp neoliberal economism” (p. 53). These critiques have, in many ways, sought to uncover issues of power by analyzing ways in which discourses of development have been propagated and employed from global- to local-levels. An overview of these analyses is now provided, with particular emphasis placed on discourses influencing development practice in Peru.

Discourses of Development

Discourses have been described as processes influencing the construction of meaning that people share about issues or things in the world (Wanner, 2015). Dryzek (2005) suggests that discourses “construct meanings and relationships, helping to define common sense and legitimate knowledge...Discourses are bound up with political power” (p. 9). Both internationally and in Peru, development discourses may consist of a combination of other socially constructed concepts, including discourses on ‘poverty’ or ‘sustainability’, collectively employed to legitimize and reinforce political actions or institutions. Mowforth & Munt (2009) describe the apparent effects of international politics on global thinking:

...it appears that the product of global politics is the emergence of a euphemistically entitled international community, something of a globalized consciousness, a seemingly popularized and benevolent global collective or ombudsman that acts in the best global interests intervening to solve a myriad of problems from civil war, international crime cartels and terrorism to the killing of whales and the destruction of rainforests. (p. 29)

Alluding to the ostensible influence of international politics and processes of globalization on ‘underdeveloped’ countries, many critiques have highlighted ‘Development’ as

a Foucauldian discourse “by which the industrialized ‘West’ has continued to exercise control over processes of global change in a postcolonial world” (Yarrow & Venkatesan 2012, p. 3; Escobar, 1995). Critiques of development or post-development paradigms have thus appeared particularly concerned with “all that Development conceals – especially strategies of power” – and ways in which development discourses may influence what comes to be considered common sense or natural behavior (Curtis & Spencer, 2012; Mosse, 2013, p. 229).

Comparing development discourses to local views of poverty and tourism can draw attention to such strategies of power. Western representations of poverty as a kind of ‘pauperism’ – consisting of the dissolution of communal solidarity, limited income-earning potential, and beggarly aspirations to live like the wealthy – appear to be “external impositions with limited local relevance, illegitimately foisted on communities in the global South” (Shaffer, 2012, p. 1769). In the case of Peru, this leads to questions about how national-level paradigms and approaches to development may complement or contradict ways in which indigenous people seek to improve their lives through involvement in tourism.

Studies on Peru have explored the juxtaposition of such discourses of development against the interests and views of indigenous people (Degregori, 2000; Copestake, 2008, 2011). Based on a review of national policy literature related to poverty, well-being, and inequality (Altamirano, Copestake, Figueiroa, & Wright-Revollo, 2004), Copestake (2008) suggests that development discourses in Peru might be placed into three categories: *income first*, *needs first*, and *rights first*. More recently, these approaches have been re-presented as mental models or global designs of development (Copestake, 2011), with a *local first* category being added to the original three.

According to Copestake, the income first discourse alludes to the adoption of predominantly neoliberal policies by the Peruvian government since the early 90s, initiated under Fujimori's presidency and emphasizing market-led growth primarily through (capitalistic) private enterprise. The needs first discourse was influenced by the United Nations Development Program (UNDP) and includes attempts by the Peruvian state to alleviate poverty by addressing specific deprivations in areas such as schooling, health, welfare, and sanitation. It represents a kind of managed capitalism, where the state or other organizations must intervene to address needs either stemming from or ignored by the market. A rights first discourse has characterized development practices by civil society, some non-governmental organizations (NGOs), and the health sector, arising in response to issues of racialized inequality and clientelism that have contributed to the marginalization of certain populations in Peru (such as people illiterate in Spanish, who were not allowed to vote until 1979; Herrera, 2013). This approach represents a kind of society-led development based on popular struggles for justice and equal opportunities. Finally, a local first discourse views the other three as representative of a process of development that "constantly reaffirms the West's view of itself as the center of legitimate knowledge, the arbiter of what counts as knowledge and the source of 'civilized' knowledge" (Smith, 1999, p. 63). Copestake (2011) suggests that the local first approach has close ties to the idea of *lo Andino*, which "refers to a social and cultural identity rooted in the uniqueness of the Andean environment and history that limits the possibility of fully translating into any other language indigenous concepts, such as *sumaq kasway*" (p. 98). While the local first model may itself be considered a global design, it emphasizes community-led approaches to development by focusing on solidarity, self-determination, and local views and interests.

These four discourses of development represent a potential framework for comparing development discourses with local perceptions of poverty and tourism practice in rural communities outside of Cuzco. Given the emphasis on tourism as a principal component of strategies for poverty alleviation currently pursued by government, industry, and the voluntary sector (e.g., NGOs) in Peru, a discussion of the history and appropriation of tourism as a development tool is now provided.

Development, Tourism and Poverty

The United Nation's Millennium Development Goals (MDGs) represent an international effort to address the multifaceted nature of poverty on economic, social, and environmental levels. As the UN prepares to adopt the Sustainable Development Goals (SDGs) in September of 2015, the influence of development discourses on Peruvian tourism policies and practice may lead to significant ramifications for tourism associations in areas like Cuzco and the surrounding *Valle Sagrado* (Sacred Valley). Like their predecessors, the SDGs will seek to address issues such as poverty, hunger, inequality, and environmental degradation while placing an increased focus on good governance as a 'fourth pillar' of sustainability (Burford et al., 2013).

Although it is far from a panacea, tourism has been widely touted as a tool for supporting international development and poverty alleviation efforts since the late 90s (Bricker, Black, & Cottrell, 2013). Three organizations have contributed significantly to these discussions: the 'Sustainable Tourism-Eliminating Poverty Program' (ST-EP) of the United Nations World Tourism Organization (UNWTO); 'Pro-Poor Tourism' (PPT) policies of the United Kingdom's Department for International Development; and the efforts of the Netherlands Agency for International Development (SNV) (Holden, 2013). In the subsequent section, an overview of

PPT will be provided, highlighting the need for emic and etic considerations and methodologies for evaluating the tourism-poverty nexus among indigenous people.

Pro-Poor Tourism

Poverty has become an *idée fixe* in the West and its eradication represents a growing international concern. The tourism industry has not been exempt from the influence of these trends. As the actions and institutions of Earth's 7.2 billion people become increasingly linked within a \$90 trillion global economy (Sachs, 2014), tourism has received mounting attention as part and parcel of pro-poor growth and sustainable development (Mowforth & Munt, 2009; Holden, 2013).

Among recent approaches stressing the link between tourism and poverty is a relatively new field known as pro-poor tourism (PPT). Developed in the late 90s, PPT explicitly seeks to unlock opportunities for the poor through purposeful institutional change across multiple scales of government, industry, and the voluntary sector (Ashley, Boyd, and Goodwin, 2000; Ashley & Roe, 2002; Goodwin, 2008; Scheyvens, 2011; Scheyvens & Russell, 2012; Van de Mosselaer & Van der Duim, 2013). PPT is not opposed to working with the mainstream tourism industry and, although the idea of "pro-poor" evinces allusions of socialism, it is not primarily concerned with bringing down existing neoliberal or capitalistic structures (Goodwin, 2008), which some critiques have addressed (Chok, Macbeth, & Warren, 2007; Harrison, 2008).

Proponents of PPT suggest that 'unlocked opportunities' may result from specific adjustments in government policies and tourism practices, leading to a 'tilting of the cake' and increased involvement of the poor in tourism chains (Bennett, Roe, & Ashley, 1999; Goodwin, 2008; Mitchell, 2012; Roe & Urquhart, 2001). Critics of the PPT agenda argue that, if tourism is

to benefit the poor at all, mere adjustments are not enough. Instead, arrangements must be overhauled and then redirected to “address the structural reasons for the north-south divide, as well as internal divides within developing countries” (Hall, 2007, p. 4).

Such changes within spaces of government and industry may be necessary for tourism-based poverty alleviation to occur, but the poor themselves appear to play an equally important role as “active agents of change” – taking part in transforming the relations or processes that affect them (Scheyvens, 2011, p. 23). Assessing whether such transformations lead to greater benefits for the poor will require ongoing analysis of the interplay between macro-scale institutional dynamics and micro-scale action by individuals and community-level associations (Bramwell, 2011). Considering the relationship between structure and agency in this fashion may contribute to a more holistic understanding of the potential for tourism to alleviate poverty (Erskine & Meyer, 2012).

In considering approaches for measuring tourism-based poverty alleviation among indigenous people, an inescapable critique of PPT is that such approaches appear principally driven by external interests and non-indigenous decision-makers (Truong, Hall, & Garry, 2014). Local voices are rarely emphasized in studies of poverty alleviation through tourism, let alone tourism studies in general (Stronza, 2008). As such, many claims for tourism’s potential to alleviate poverty are disproportionately based on outsider views of poverty and the need for external, institutional transformation rather than on the expressed rights and interests of local people. Because indigenous people in the Valle Sagrado may not see themselves as ‘poor’ – considering lonely travelers to be worse off than they are, for example (Zoomers, 2008) – it is argued here that poverty alleviation may be more effectively conceptualized in a relative sense based on local views.

When seeking to adapt or adopt development policies that emphasize tourism as a tool for poverty alleviation, the simultaneous consideration of both mainstream and indigenous interests and perceptions – and of potential commonalities between them – may be valuable (Taylor, 2008). In other words, emphasizing local views and interests alone may lead to an oversimplification of the fluctuating milieu characterizing indigenous people’s involvement in tourism. As such, Stronza and Gordillo (2008) suggest that, when exploring tourism-based change and the resulting implications for indigenous peoples, both emic and etic factors should be considered. Emic factors emphasize locally relevant issues and ways of knowing, focusing on human dignity and the right to self-determination possessed by local people (Nussbaum, 2011; Smith, 1999). Etic factors, on the other hand, relate to outsider interests and perceptions, highlighting the potential influence of externally-created goals and socio-political arrangements on the opportunities unlocked through tourism.

The remainder of this literature review addresses the need for PPT studies involving indigenous people to more effectively incorporate methodologies linked to both emic and etic considerations. With respect to emic considerations, the following section provides an overview of indigenous tourism and local perceptions of the tourism-poverty nexus. It also provides an overview of Beebe’s (2014) Rapid Qualitative Inquiry as an ethnographic methodology for evaluating emic perceptions of tourism and poverty among indigenous people.

EMIC CONSIDERATIONS

Indigenous Tourism

With growing numbers of travelers seeking cultural experiences among indigenous peoples in remote and natural settings, assessing how indigenous tourism might address

international development and poverty reduction goals has become an increasingly salient topic (Donohoe & Blangy, 2013; Goodwin, 2007; Saarinen, Rogerson, & Manwa, 2013). Butler & Hinch (2007) define indigenous tourism as "...tourism activity in which indigenous people are directly involved either through control and/or by having their culture serve as the essence of the attraction" (p. 5). With its focus on cultural exchange and nature-based experiences, indigenous tourism may also be considered a subset of a variety of fields including cultural tourism (Blundell, 1995), ethnic tourism (Pitchford, 2006), and alternative tourism or ecotourism (Sinclair, 2003; Blamey, 2001).

Researchers with a sensitivity toward anthropological and sociological theory, methods, or praxis have made rich contributions to indigenous tourism discourse, analyzing an array of topics including structures of power in destination areas, the distribution of wealth among host communities, community empowerment through tourism, the commodification and 'staged authenticity' of indigenous cultures, the 'tourist gaze,' and the conservation of nature for tourism, to name a few (Cohen, 1988; Harrison, 2008; Honey, 2008; MacCannell, 1973; Mowforth & Munt, 2009; Nash, 1996; Scheyvens, 1999; Urry, 1990). Given these and the variety of other socio-cultural, political, economic, and environmental topics it explores, the study of tourism has been particularly attractive to anthropologists over the years. As Stronza (2001) states: "Indeed, many of the major questions that concern cultural anthropologists appear in the study of tourism" (p. 261). Interestingly, Butler & Hinch (2007) suggest that the field of indigenous tourism itself became recognized as a more legitimate academic discipline when, in 1977, anthropologist Valene Smith published *Hosts and Guests: The Anthropology of Tourism*.

Although social scientists have conducted numerous studies on myriad facets of tourism, there is a dearth of studies that emphasize indigenous peoples' voices, perceptions, and interests

with respect to tourism development in their communities (Stronza & Gordillo, 2008). Assessing if and how tourism may alleviate poverty necessitates a greater incidence of these local voices and perspectives. In an indigenous tourism context, the extent to which a particular study may be deemed “legitimate” or “empowering” is indelibly tied to local perceptions and participation. Although historically they have been objectified and dehumanized in the name of science, indigenous peoples are becoming increasingly involved in research, not merely as the subjects or even the participants of a study, but as the researchers themselves (Borman, 2008; Smith, 1999; Whyte, 2010). This kind of research embodies what could be called a self-mobilizing form of participation (Pretty, 1995), and more of its kind could strengthen the legitimacy of PPT discourse and claims that tourism can help alleviate poverty among indigenous people.

Indigenous Tourism and Local Perceptions

In evaluating tourism-based poverty alleviation among indigenous peoples, there are persistent concerns with what counts as ‘poor’ and with how local perceptions and interests might become the drivers rather than the mere topics of research (Donohoe & Blangy, 2013; Nielson & Wilson, 2012; Whyte, 2010). Since the 1970s, tourism researchers have emphasized the importance of understanding residents’ perceptions of tourism benefits or impacts and their attitudes about tourism development in general (Vargas-Sanchez, Porrás-Bueno, Plaza-Mejía, 2011). Being able to assess local views regarding positive as well as negative tourism-related change may thus support efforts to increase indigenous involvement in tourism planning, ostensibly leading to increased benefits for local people, travel companies, and visitors (Higgins-Desbiolles, Trevorrow, & Sparrow, 2014; Truong, Hall, & Garry, 2014).

With respect to positive change, indigenous tourism has been shown to benefit communities in non-economic terms such as “renewed interest in cultural traditions, community cohesion, and a revaluing of indigenous assets” (Donohoe & Blangy, 2013, p. 65; Zorn & Farthing, 2007). Economic benefits relate to enhanced financial capital such as increased employment opportunities or income (Victoria University, 2002). Donohoe and Blangy (2013) assert that, for communities that experience these changes, tourism may become, “valued as an alternative to government aid dependence, a focal point for self-determination, and an important tool for addressing the multidimensionality of poverty” (p. 65). In other cases, the perceived impacts of indigenous tourism on host communities have been less positive. These impacts may include increased social conflict (Cousins & Kepe, 2004), habitat loss through resource depletion (Ferraro, 2001; Taylor, Yunez-Naude, & Ardila, 2003), commodification of indigenous spirituality (Gómez-Barris, 2012), and a weakening of communal institutions (Quispe, Huatta, & Machaca, 2005).

Because indigenous peoples can view poverty differently from the way Westerners do, deciding whether it may be alleviated through tourism depends largely on the perceptions of those impacted (Ravnborg, 1998). Zoomers (2008), working in the Andean highlands of Peru and Bolivia, suggests that Quechua-speaking people often associate being poor (or *waqcha*) with having no community or family, and the idea of wealth (or *qhapac*) with having possessions that can be shared with others. Zoomers also describes how many rural, indigenous communities of Peru and Bolivia were not aware of the concept of poverty (e.g., that they were ‘poor’) until non-governmental organizations (NGOs) began to map out its prevalence in the region in the 1990s. Similarly, in a study of local views of ecotourism by Stronza and Gordillo (2008), indigenous people in Bolivia, Ecuador, and Peru were asked if ecotourism in their community

led them to feel “richer” in any way. Although many said yes, being “rich” was often described more holistically (e.g., having “trees, rivers, fish;” having “more friends or contacts;” being able “to help one’s family and others”) rather than solely in terms of financial or material wealth (p. 456).

Efforts to understand whether indigenous tourism helps more than it hurts – and whether it has the potential to unlock opportunities for the poor – thus appear to depend on local views and interests as well as on perceived changes related to tourism. By exploring local perceptions in this way, researchers may be able to reinforce indigenous rights to self-determination while contributing to broader theoretical and development goals (Coria & Calfucura, 2012; Nielson & Wilson, 2012). Without overlooking issues of power, “the anthropologist should be satisfied that he or she has given both [participants] and science their due” (Nash, 1996, p. 12). Given the potential conflicts arising from differences between local interests and national-level tourism policies or international development pressure, being able to give ‘participants and science their due’ may require an evaluation of local perceptions and motivations related to poverty and tourism practice. An overview of one methodology for making such an evaluation is now provided.

Rapid Qualitative Inquiry

Rapid Qualitative Inquiry (RQI) is a form of participatory research that explores emic perspectives of a situation or phenomenon by employing ethnographic methods over a one to six week period to encourage communication with participants using their “vocabulary and rhythm” (Beebe, 2009, p. 1). In addition to the shorter time frame in which it occurs (one to six weeks), RQI differs from traditional ethnography by taking a team-based approach to both data

collection and analysis, with the research team consisting of at least one member of the local community who is involved in planning, data collection, data analysis, and preparation of the final report.

In addition to emphasizing team-based research, RQI encourages data collection through various qualitative methods. Rather than focus on ‘triangulation’ which implies there is a truth to ascertain, RQI simply emphasizes collecting and analyzing data through multiple methods with a team (Beebe, 2014; Decrop, 1999). These methods often incorporate a range of qualitative data collection techniques such as the use of field notes, participant observation, interviews, or reports of various kinds (e.g., from community associations, government records, etc.).

Field notes and participant observation often entail writing down detailed observations and direct quotations of community members, but also include reflections, inferences, or other notes the researchers wish to record. In RQI, careful attempts are made to keep observations about respondents separate from researchers’ personal notes or thoughts. Notes should include detailed information about each interview (e.g., setting, who is present, physical description of the respondent, and non-verbal communications during the interview); about the situation or phenomenon under consideration (e.g., setting, physical descriptions of those present, activities or transactions that occur, verbal and non-verbal communications, etc.); and about research processes and outcomes (e.g., setting, who is present, who is participating, recommendations offered, conclusions reached, next steps, etc.). Other items to record include detailed descriptions of community members’ ways of life, environmental characteristics, personal interactions with local people or with outsiders, underrepresented or marginalized groups (e.g., women or youth) within each community, and any other items that would contribute to a richer understanding of the context in which the research team is operating.

RQI takes a three-step approach for analyzing the data, carried out by the research team: coding the data, data analysis, and drawing conclusions (Beebe, 2009; 2014). To code the data, research team members are provided with ‘logs’ consisting of copies of transcripts from interviews and field notes. Logs are read, discussed, and divided by the research team into thought units. A thought unit might consist of an individual word, a sentence, a paragraph, or several paragraphs. The research team assigns labels or codes to groups of thought units that appear to share similar themes or characteristics. For data analysis, the research team seeks to synthesize meaningful, overarching conclusions based on the data. This should be an iterative, ongoing process, and will involve checking in with study participants to verify the validity of the results.

After consulting with communities and finalizing conclusions, the research team may compile reports, providing communities or funding institutions with summaries of research processes and outcomes, potentially leading to actionable findings for interested parties. A checklist of accomplishments may also be provided in the form of a “RAP Sheet” – containing information about research team members; hours of data collection; hours of team interaction discussing data; types of information collected through field notes, association/government reports, or semi-structured interviews; number of individuals interviewed; how respondents for semi-structured interviews were selected; interview locations; and information about respondent diversity.

In summary, RQI may be described as intensive, team-based, qualitative inquiry that is based on a case study approach, that uses multiple techniques for data collection, and that applies iterative data analysis and additional data collection to quickly develop a preliminary understanding of a situation from the insider’s perspective (Beebe, 2014). However, because too

much emphasis on local participation can lead to increased burden on communities while causing outsiders to relinquish responsibility, the explicit purpose of this approach is to produce results for outside entities and decision makers (e.g., local government representatives in the Cuzco region, Intrepid guides and staff in Peru, or Intrepid staff headquartered in Melbourne).

The need to link emic considerations to outside entities in this fashion has been highlighted in tourism studies involving indigenous people. Coria and Calfucura (2012) write:

What seems clear... is that — at least in the short run — indigenous ecotourism does not survive spontaneously without the full involvement of the indigenous community, and the support from external agents in the design, implementation, and diffusion of ecotourism ventures. (p. 54)

While RQI seeks to understand a situation based on local vocabulary and rhythm, attempts to involve external agents in tourism ventures involving indigenous people may require references to etic concepts, methodologies, and theories. Stronza and Gordillo (2008) suggest that “etic accounts will cover meanings that register more clearly with outsiders, including conservationists, development NGOs, tour operators, and researchers” (p. 462). As such, the following section focuses on etic considerations, providing an overview of two theories that appear especially salient for addressing the interplay between agency and structure in PPT studies. The first is Jessop’s (2008) strategic-relational approach which is linked to so-called ‘new-institutionalist’ perspectives in the structure-agency debate. The second is Sen’s (2000) capability approach, which conceptualizes poverty in terms of capability deprivation – an increasingly recognizable feature in PPT and development studies.

ETIC CONSIDERATIONS

Institutions and the Strategic-Relational Approach

Institutions have been described as social constructs produced and reproduced through human interaction and comprised “of written rules as well as typically unwritten codes of conduct that underlie and supplement formal rules” (North, 1990, p. 4; Berger & Luckmann, 1967). They are often seen as structural features (either formal or informal) comprised of groups of individuals who engage in patterned, predictable behaviors that are dependent on specified relationships (Peters, 2012, p. 19)

A long history of institutional analysis in the social sciences has placed particular emphasis on the struggle for power in the emergence, constitution, and influence of the nation-state as a governing structure charged with deciding who gets what, when, and how (Lasswell, 1936; Foucault, 1978; Jessop, 2008). Other studies have focused on institutional dynamics and related action influencing the evolution of smaller-scale social enterprise or supranational organizations like the United Nations (Scarlatto, 2013; Spires, 2011; Stone, 2011). Moving beyond predominantly structural analyses (e.g., Weber’s ‘iron cage’ of bureaucracy), studies have shifted toward a so-called ‘new institutionalism’ since the late 70s to highlight the complex interplay between individual and collective action, broader socio-political pressures, and institutional change (Meyer & Rowan, 1977; Peters, 2012; Weber, 1905).

Pastras & Bramwell (2013) incorporate new institutionalism in their analysis of the state’s involvement in tourism marketing in Athens, Greece. They describe six considerations that have characterized this approach in the literature. These include the relational character of institutions; the recursive nature of institutions as relatively stable social practices influencing and influenced by actors; visible organizational structures and less visible conventions and

values influencing power dynamics; the duality of agency and structure; the spatial scale of influence of government institutions; and historical trends which “structure relational opportunities and constraints” (p. 394), where institutional path dependence and path shaping are influenced by ongoing social relations.

Many of these elements – and the concepts of path dependence and path shaping, in particular – represent key features of Jessop’s (1985; 1989; 1990; 1996; 2001; 2008) strategic-relational approach to institutional analysis. Aligning with Giddens’s (1984) structuration theory, the strategic-relational approach seeks to bring structure into agency and agency into structure rather than provide separate and often deterministic analyses of these phenomena. Jessop builds on structuration theory by emphasizing the dynamic and strategic processes behind institutional change, where decisions are both ‘calculated’ by reflexive agents and ‘selected’ (in an evolutionary sense) by the institutional context. Jessop (2001) writes:

One way to go beyond the duality of structuration theory is to examine structure in relation to action and action in relation to structure, rather than bracketing one of them. Structures are thereby treated analytically as strategic in their form, content, and operation; and actions are thereby treated analytically as structured, more or less context sensitive, and structuring. (p. 1223)

Here, the process of institutionalization becomes co-constituted by acting structures and structuring actors such that certain strategies and institutional arrangements appear privileged over others, contingent upon specific spatio-temporal contexts and socio-political factors.

This favoring of certain actions and arrangements is highlighted in the strategic-relational approach by the concepts of ‘strategic calculation’ and ‘strategic selectivity’ (Jessop, 1996; 2008). Strategic calculation refers to actors’ tendency to mobilize their (limited) understanding

of the myriad factors constituting a given institutional context to reflexively evaluate, pursue, solidify, or alter particular structural dynamics within that context. Actors may weigh a variety of possibilities before making decisions leading to institutional change, “so that in these processes there are dialectical relations between the ideational and the material” (Pastras & Bramwell, 2013). The perceptions, interests, and values of each actor – coupled with an incomplete knowledge of other actors and the institutional context – hold notable sway in the strategic calculation of potential and eventual courses of action.

At the same time, Jessop suggests that these actions may be influenced by the environment or institutional context itself. The concept of strategic selectivity highlights “the tendency for specific structures and structural configurations to reinforce selectively specific forms of action, tactics, or strategies and to discourage others” (Jessop, 2001, p. 1224). The strategically selective context doesn’t determine which strategies are employed, but does favor the realization of some actions over others. A ‘structural moment’ (i.e., *constraint*) consists of those elements of an institutional context that cannot be altered by agents pursuing a given strategy under certain spatio-temporal conditions. Conversely, a ‘conjunctural moment’ (i.e., *opportunity*) consists of those elements of an institutional context that can be changed (Jessop, 1996).

While the strategic-relational approach represents one way for analyzing dynamic actions and structures within state-level governance and tourism policy (Pastras & Bramwell, 2013), the approach has also been applied to evaluate core-periphery relationships and the co-evolution of smaller-scale institutions (Chaperon & Bramwell, 2013). This dissertation builds on the latter approach by assessing the strategically selective configurations of small-scale (e.g., community-level) institutions alongside the strategies of calculating and reflexive actors wishing to address

specific institutional concerns. Consideration is given to the potential for these processes of institutional change to alleviate a kind of *institutional deprivation* through unlocked opportunities.

The dynamic interplay between institutional constraints and opportunities and individual or collective action relates to Sen's (2000) capability approach to evaluating poverty and its alleviation. While studies on pro-poor tourism (PPT) make frequent (though often implicit) references to Sen's capability approach in describing tourism's potential to "unlock opportunities" or "enhance freedoms" for the poor, few studies have explicitly considered the complex ways in which evolving institutional arrangements may influence and be influenced by actors to alleviate poverty in terms of enhanced freedoms. These factors and the roles of structure and agency, in particular, are now considered as they relate to Sen's capability approach to development.

The Capability Approach

In contrast to traditional views linking development to poverty alleviation via economic growth, Friedmann (1992) describes development in terms of social, psychological, and political empowerment with a focus on ensuring marginalized people have access to society's myriad resources (Yosef, 1994). Empowerment has been emphasized in the context of tourism to stress the importance of institutional change leading to increased local control over resources and decision-making processes (Ramos & Prideaux, 2014; Scheyvens, 2002; Timothy, 2007).

Such an emphasis on empowerment is related to Sen's conceptualization of poverty alleviation as freedom enhancement. The capability approach draws attention beyond the mere means to achieve (e.g., money) and emphasizes people's opportunities (i.e., *capabilities*) to live

lives they have reason to value (Sen, 1985a; 2000). According to Croes (2012), “capabilities refer to the ability of an individual to function, to seize opportunities, to make choices, and to take actions” (p. 543). The realization of a particular capability is referred to as a *functioning*, and people’s functionings may be used as “the evaluative focus” to discursively assess levels of individual deprivation (Sen, 2000, p. 75; Nussbaum, 2011). In this way, poverty alleviation may be described in a relative sense in terms of unlocked opportunities or enhanced freedoms by identifying improvements in various functionings such as improved living conditions, increased levels of education, empowerment (e.g., local control over tourism development), greater happiness, or decreased conflict.

The Multidimensional Poverty Index (MPI), referenced earlier as a supplementary measure to the HDI, is an example of one measure of poverty based on an application of the capability approach. It adds to income-based measures of acute poverty by considering whether people have realized a set of core needs, rights, or functionings (Alkire & Santos, 2014; Sen, 2000). As Alkire & Santos (2014) point out, part of the rationale for the use of the MPI is the way that poor people themselves describe poverty. Far more than a lack of income or basic rights, poverty has been generally described by the poor as lacking physical, human, social, or environmental assets; lacking basic resources such as housing or food; an absence of infrastructure like health clinics or roads; and lacking power or voice to varying degrees (Scheyvens, 2011, adapted from Narayan et al., 2000).

Such restrictions in functioning depend on various personal qualities and sociopolitical or environmental arrangements. The capability approach thus highlights the interplay between agency and structure by placing “explicit focus on personal and socio-environmental conversion factors of commodities into functionings, and on the whole social and institutional context that

affects the conversion factors and also the capability set directly” (Robeyns, 2005, p. 99). The implication here is that, if certain factors either limit or enhance people’s capabilities or freedoms, then any adjustment to them necessarily influences people’s ability to function in meaningful ways and, by extension, their well-being (Figure 2.1). When adjustments to enhance individual or collective freedoms can be made but are not, poverty may become what Ballard (2012) calls “hegemonically redundant” (p. 564), where capability deprivation is cyclically reproduced over time. On the other hand, when such adjustments are made through changes in institutional configurations – and augmented by concomitant individual or collective action – poverty alleviation may be observed to the extent that people are more free to pursue the kind of life they have reason to value.

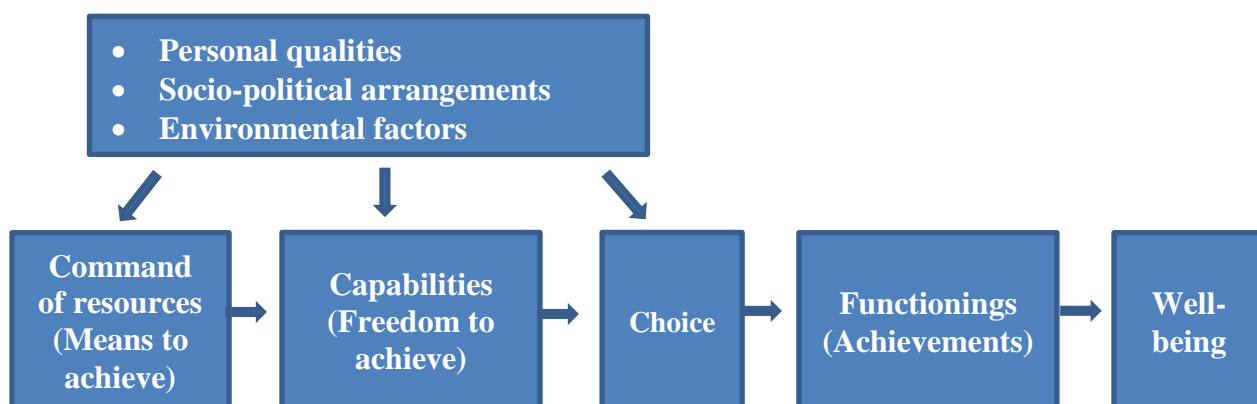


Figure 2.1.
The Capability Approach (adapted from Robeyns, 2005 and Croes, 2012)

While Sen (2002) acknowledges the “socially dependent” nature of individual capabilities (p. 85), others have criticized the capabilities approach for being overly focused on individual agency and freedom (Dean, 2009; Evans, 2002; Ibrahim, 2006; Pelenc, Lompo, Pallet, & Dubois, 2013). Ibrahim (2006) addresses this concern, explicitly distinguishing

...between individual capabilities, resulting from the individual's freedom to choose the life he/she has reason to value, and collective capabilities generated through the individual's engagement in a collective action. The expansion of collective capabilities not only requires the use of agency freedom (i.e., individuals pursuing goals other than their own), but also involves participation in a collectivity. (p. 404)

Participation in collectivities (e.g., indigenous tourism associations in the Valle Sagrado) may be especially important for poorer individuals who often appear to shift their preferences (i.e., interests) according to external influences and their struggle to survive (Sen, 2000). However, to foment positive change and to minimize preference shaping among those most vulnerable, issues of power must be addressed. Evans (2002) suggests that the "promotion of a vibrant associational life...enables the less privileged to develop their own distinctive preferences and priorities based on their shared economic positions and life circumstances, and to develop shared strategies for pursuing those preferences" (p. 59). Collective capabilities unlocked through the formation and evolution of tourism associations within broader socio-political contexts may thus lead to desirable functionings for the poor that may not be otherwise feasible through individual action.

A surging emphasis on collective capabilities and associational life among rural, indigenous communities in the Valle Sagrado highlights the evolving (macro-)institutional context of tourism governance and state-wide focus on poverty alleviation in Peru. However, as several studies suggest, national emphasis on a more vibrant associational life has not translated into widespread, pro-poor gains for rural, indigenous communities like those of the Valle Sagrado (Escobal & Ponce, 2011; Munoz, Paredes, & Thorp, 2007). Munoz et al. (2007) point out that "a certain degree of coherence in the institutional framework" (p. 1930) is vital for

unlocking capabilities and achieving successful collective action, especially among the relatively poor who assume greater costs when seeking to participate in fragile institutional systems. Similarly, Estache (2004) suggests that local-level institutional weakness must be addressed if the poor are to benefit from improved infrastructure and related development efforts. A better understanding of the myriad strategies considered and employed by local people to alter institutional configurations (both visible structures and less visible norms and “rules of the game”) may thus support efforts to evaluate poverty alleviation through enhanced individual and collective (i.e., associational) opportunities in the Valle Sagrado.

Although it represents but one way to view and evaluate poverty, Sen’s capability approach can allow for the incorporation of poverty indicators recognized by non-indigenous groups while emphasizing the interests and perceptions of indigenous communities to enhance opportunities available for local people (Maru & Chewing, 2011). Taking into account both the multidimensional and subjective (i.e., site-specific) nature of poverty, the capability approach has been broadly applied in the context of international development. At the same time, while diverse methodologies may be proposed for qualitative comparisons of local views of indigenous tourism, the capability approach has been increasingly referenced as a valuable tool for conceptualizing and measuring pro-poor tourism (PPT) impacts such as those presented in this dissertation (Croes, 2012; Scheyvens, 2011; Van de Mosselaer & Van der Duim, 2013).

CONCLUSION

Global development trends are ineluctably influencing the complex interaction between local and external interests pertaining to tourism in Peru’s Valle Sagrado. With mounting socio-political and ethical pressure to understand whether tourism helps communities in the region

more than it hurts, a review of the literature offers several practical and theoretical insights into how evaluations of the tourism-poverty nexus among indigenous people may be carried out more effectively.

First, there is a need for PPT studies to more purposefully incorporate indigenous voices describing processes of empowerment related to tourism practice and arrangements. Second, while many PPT studies linking tourism and development implicitly refer to Sen's capability approach, a more explicit application of Sen's work may support efforts to evaluate tourism's potential to alleviate poverty based on local perceptions. Third, while there is an increased recognition of the influence of institutional configurations (e.g., policies, norms, etc.) on cyclical poverty, more studies are needed that consider ways in which specific strategies for institutional change may enhance freedoms for local people. Lastly, from a practical standpoint, a comparison of development discourses and local accounts of poverty and tourism practice may encourage a more localist stance in policy creation, contributing to greater justice and equity in the ways indigenous people become involved in tourism and are impacted by it.

CHAPTER III
LOCAL PERCEPTIONS OF EMPOWERMENT THROUGH TOURISM IN
PERU'S SACRED VALLEY

OVERVIEW

Influenced by an array of personal, socio-political, and environmental factors, empowerment through community-based tourism (CBT) has become a questionable phenomenon characterizing many indigenous/mestizo communities in Peru's *Valle Sagrado* (Sacred Valley). Based on ethnographic field work from June-December of 2013, this study builds on Rowlands' (1997) power framework to evaluate empowerment processes as enhanced domination, agency, collectivity, or self-awareness in four of these communities. Triangulated analysis of semi-structured interviews ($N = 93$), participant observation, and government/community reports suggests that tourism association members have experienced enhanced domination ('power over') as both recipients and purveyors, contributing to non-generative forms of empowerment at multiple scales. Generative forms of empowerment as enhanced agency, collectivity, and self-awareness were also seen, especially for women association members working in CBT. These findings present a theoretical and practical need for tourism studies and policies to pursue generative rather than merely sustainable tourism development in the region, requiring more than zero-sum processes of empowerment in pursuing poverty alleviation through tourism.

INTRODUCTION

A veces, otros te reclaman o te insultan para que limpies o cocines mejor. Mucha gente no puede aguantar los insultos de los demás, así que se retiran de trabajar en el turismo. Pero yo he aprendido apreciar lo que dicen los demás, porque es por mí bien.

Sometimes, others complain to you or insult you so that you clean or cook better. Many people can't take the insults of others, and so they quit working in tourism. But I've learned to appreciate what others say, because it's for my own good. (QT-2)

My research assistant and I listened intently as Renalda¹ described her experiences working in *turismo rural comunitario* (TRC, or rural/community-based tourism) outside the ancient Inca capital and present-day World Heritage Site of Cuzco, Peru. We had gathered in the kitchen of Renalda's mud-brick, thatch-roofed home in the town of Qorqor, located about forty minutes by car from the city and just up the road from the site selected for the construction of Cuzco's new international airport (to be completed in 2020). One of her daughters had joined us and was jumping playfully around on the dirt floor, stirring up a cloud of earth that further complicated my efforts to breathe at 13,000 feet. Renalda continued to describe a particular experience from 2012 in which she and other *socias* (associates) from her community's tourism association were being trained to prepare food for visitors:

I feel very satisfied when I learn, but at first it wasn't like that. Last year, a trainer came from the travel company Chaski Tours to teach us how to cook better. The man screamed at me and insulted me so strongly – telling me things about how to improve my food preparation – that I cried twice, because I couldn't cook. Not even my husband would say

those things to me or talk to me like that. But I learned from it and now I know how to use a blender to make aji and mayonnaise. (QT-2)

For the increasing number of individuals choosing to work in TRC in the region, such accounts of perseverance, of learning, of struggling to *superar* (overcome) or *salir adelante* (get ahead) are not uncommon. However, by the end of my nearly six month stay conducting ethnographic field work on local perceptions of tourism-based poverty alleviation and development outside Cuzco in 2013, I was aware that these references to personal commitment, responsibility, will-power, and investment were telling but half the story. As Renalda's commentary suggests, undercurrents of power – deep and intertwined – seemed to be at play in the way tourism association members and rural communities outside of Cuzco were becoming involved in, being effected by, and influencing the processes and outcomes related to TRC at the local-level.

TRC is a form of community-based tourism being currently promoted in Peru through a nationwide program (the *Programa Nacional de Turismo Rural Comunitario*) to empower rural communities and to promote sustainable development through tourism. Many studies have linked community-based tourism (CBT) to processes of power and development (Blackstock, 2005; Manyara, 2006; Ramos & Prideaux, 2014; Sofield, 2003). Salaazar (2012) suggests that the “main strength of CBT...lies in its potential to empower rural communities and to make a substantial contribution to development and the eradication of poverty” (p. 11). At the same time, the potential for CBT to empower local people has been a topic of ongoing debate, suggesting that contextual analyses of power are necessary in evaluating CBT's poverty alleviating potential. Ruiz-Ballesteros and Hernández-Ramírez (2010) speculate:

From this perspective, and as the result of a concern that is both academic and political, it is worth questioning whether [TRC] – as an accentuated form of community-based tourism – really does strengthen and empower communities, thereby fulfilling at least part of its sustainable development goals. (p. 203)

In view of these ‘on-the-ground’ concerns and related trends characterizing analyses of power and poverty alleviation in the context of community-based tourism (Coria & Calfucura, 2012; Erskine & Meyer, 2012; Han, Wu, Huang, & Yang, 2014; Ramos & Prideaux, 2014; Ruiz-Ballesteros & Hernández-Ramírez, 2010; Weaver, 2010), the purpose of this paper is to evaluate processes of empowerment pertaining to TRC and factors influencing those processes in four rural communities outside Cuzco: *Chichubamba*, *Amaru*, *Sacaca*, and *Qorqor*. This evaluation involves two-steps. First, Rowlands’ (1997) four-part framework of power is applied to conceptualize processes of empowerment among local people, based primarily on local perceptions of TRC and specific interactions with Intrepid Travel – a Melbourne-based international tour operator working with the four communities at the time of the study. Second, consideration is given to potential personal, socio-political, and environmental *conversion factors* (Robeyns, 2005) that appear essential to understanding ways in which TRC may encourage or inhibit the empowerment of local people and contribute to poverty alleviation.

The paper is structured as follows. The next section provides an overview of power and Rowlands’ (1997) four-part framework, focusing specifically on processes of empowerment in the context of CBT. The third section describes the study context and methods. The fourth section delineates results by considering examples of non-generative and generative forms of empowerment characterizing the cases under consideration (the communities working with Intrepid Travel), highlighting potential conversion factors either encouraging or inhibiting

processes of empowerment in these communities. Finally, a concluding section summarizes theoretical and practical implications of the study while stressing the need for future research.

PROCESSES OF EMPOWERMENT IN TOURISM

Although a fuzzy and contested concept, power is often linked to the idea of agency, which Sen (1985a) describes as “what a person is free to do and achieve in pursuit of whatever goals or values he or she regards as important” (p. 206). Hindess (1996), for example, describes power in its most simple form as possessing a basic capacity to act. Related to this view, many have described power in a chiefly relational sense in which one’s actions, interests, or decisions prevail over the distinct and often times opposing preferences of others (Bachrach & Baratz, 1962; Dahl, 1968; Wrong, 1979). Lukes (1974; 2005) describes a kind of covert yet coercive power that prevents others, in a Gramscian sense, from developing opposing preferences at all. Lukes (2005) poses the question:

“Is it not the supreme and most insidious exercise of power to prevent people, to whatever degree, from having grievances by shaping their perceptions, cognitions and preferences in such a way that they accept their role in the existing order of things, either because they see it as natural and interchangeable, or because they value it as divinely ordained and beneficial?” (p. 28)

Such analyses of power and their relationship to agency and processes of empowerment have led to the creation and operationalization of various frameworks, many of them applied to evaluate gender inequalities or tourism in the context of human development and poverty reduction (Alkire, 2009; Ibrahim & Alikire, 2007; Scheyvens, 2011). Two frameworks that have become increasingly visible in tourism studies since the late 90s include Sen’s (1985b, 2000)

view of development as freedom enhancement, and Friedmann's (1992) view of development as psychological, social, and political empowerment. Tourism studies incorporating Sen's capability approach have analyzed multidimensional poverty alleviation (Croes, 2012), evaluated the expansion of capabilities related to tourism development in mountain territories (Dissart, 2012), and referenced Sen's view of poverty alleviation in terms of unlocked opportunities or enhanced freedoms (Van de Mosselaer & Van der Duim, 2013). Tourism studies building on Friedmann's (1992) approach are similarly ubiquitous, analyzing processes of empowerment in terms of economic, psychological, social, political, or environmental factors (Boley & McGehee, 2014; Ramos & Prideaux, 2014; Scheyvens, 1999).

While many studies on tourism-based poverty alleviation appear at least implicitly couched in one of these two alternative development frameworks (capabilities or empowerment), it is clear that Sen's and Friedmann's conceptualizations are not mutually exclusive (Briedenhann, 2011). Highlighting the overlap between these views in analyses of development, agency, and power, Trommlerova, Klasen, and Lebmann (2015) suggest that empowerment itself may be directly linked to Sen's concept of freedom enhancement, defining it "as an increase in agency which enables individuals to pursue valuable and important goals" (p. 1). Again, Zhao and Ritchie's (2007) 'anti-poverty tourism' framework highlights empowerment as an essential component of poverty alleviation, with its overarching goal to help people "develop their *capabilities*, have a sense of control over their wellbeing and lead dignified lives" (italics added; Scheyvens & Russell, 2012, p. 422).

Taken together, the emphasis on capabilities and empowerment in tourism studies highlights the interplay between agency and structure in processes of poverty alleviation (Erskine & Meyer, 2012). This interplay suggests that the empowerment (i.e., increased agency) of local

people through CBT may depend on a number of *conversion factors*, including personal characteristics (e.g., personal histories, intellectual attributes) and socio-political and environmental contexts influencing individual or collective decisions to act (Croes, 2012; Robeyns, 2005). Robeyns (2005) suggests that Sen’s capability approach “insists...that we need to scrutinize the context in which economic production and social interactions take place, and whether the circumstances in which people *choose* from their opportunity sets are enabling and just” (p. 99). Given the ways in which local-level contexts are imbued with imbalances of power – both within communities and between residents and other actors making tourism development decisions (Church & Coles, 2007; Moscardo, 2011; Nunkoo & Ramkissoon, 2012; Timothy, 2007) – evaluations of poverty alleviation within CBT studies should seek to identify particular expressions of power as well as the factors that may be inhibiting or encouraging empowerment processes for local people.

Evaluating Expressions of Power

In an effort to simplify inherently complex and decidedly contested views of power, attempts have been made to distill its myriad expressions into typologies. Acosta and Pettit (2013), for example, combine previous conceptualizations into a ‘political economy and power analysis’ framework to evaluate characteristics influencing “relations between key development actors” (p. 6). These characteristics include a range of visible, hidden, and invisible elements related to the roles of individuals and institutions, sanctions and enforcement, drivers of change, and other considerations. In a separate approach, Trommlerova et al. (2015) build on the work of Ibrahim and Alikire (2007) and Rowlands (1997) to build a framework for analyzing empowerment, based on Sen’s view of poverty alleviation as enhanced agency or freedom. This

framework incorporates four expressions of power: ‘power over’, ‘power to’, ‘power with’, and ‘power within’. Due to its relevance for analyzing expressions of power in the context of CBT (including processes of disempowerment; Hall, 2013), this framework undergirds the analysis adopted in the present study.

‘Power over’ is distinguishable as a negative expression of power that involves the overt or covert *domination* or coercion of others. The practice of this kind of power rests on the idea that power is finite and non-generative, such that the empowerment of one individual through domination concomitantly results in the disempowerment of another. Rowlands (1997) refers to such a process as a ‘zero-sum game’. She suggests that one expression of this kind of power may be when marginalized people (e.g., women, the elderly, the poor) are *given* positions of political or economic decision-making authority, perhaps in the name of participation or collaboration. While empowerment of this kind appears commendable, Rowlands warns that the “difficulty with this interpretation is that if power can be bestowed, it can just as easily be withdrawn; empowerment as a gift does not involve a structural change in power relations” (p. 12). In CBT, this suggests that the interests and goals of local people should *drive* decision-making processes in an ongoing fashion rather than tokenistically serve short-term and predominantly external interests (Scheyvens, 2011).

The remaining three kinds of power emphasize generative and productive processes such that the empowerment of one does not necessitate the disempowerment of others. Enhanced ‘power to’ may be observed through increased individual (but socially dependent²) *agency* stemming from or leading to the unlocking of opportunities without domination. In CBT, these opportunities might include the ability for women to work and earn an income, the ability to make decisions in determining what tourists do when visiting a particular community, or, more

simply, the ability to receive quality medical care. Kelly (1992) suggests that perhaps “it is ‘power to’ that the term ‘empowerment’ refers to, and it is achieved by increasing one’s ability to resist and challenge ‘power over’” (quoted in Rowlands, 1997, p. 12). The focus of ‘power with’ is on the collective power of a group (e.g., a tourism association) to realize group interests or to address the needs of others (either members of the group or non-members). In CBT, this process might be realized through collective action directed either internally or externally (e.g., for members of a tourism association or for community members in general) – fomented by a collective recognition of existing needs and concerted efforts to address those needs. Finally, ‘power within’ is very much related to Freire’s (1970) concept of empowerment through conscientization, which has influenced participatory approaches to development since the late 70s (de Negri, Thomas, Ilinigumugabo, Muvandi, & Lewis, 1998). It entails processes of

Table 3.1.
Descriptions of four types of power and empowerment processes¹.

Type of Power	Primary Focus	Description of Empowerment Process ²
<i>Power over</i>	Domination	Increased ability to control others (e.g., through overt or covert coercion); may incite compliance, resistance, or manipulation from others; non-generative ³
<i>Power to</i>	Agency	Increased individual ability to exist or to act; related to poverty alleviation through freedom enhancement at individual level (Sen, 2000); creates or unlocks opportunities without domination; socially-dependent and generative
<i>Power with</i>	Collectivity	Increased ability to collectively address individual or group needs or interests; suggests that the whole is greater than the sum of the individuals who comprise it; generative
<i>Power within</i>	Self-awareness	Increased conscientization, self-determination, respect, etc.; similar to Friedmann’s (1992) psychological empowerment; generative

1. Adapted from Ibrahim & Alkire (2007); Lukes (1974, 2005); Rowlands (1997); Trommlerova, Klasen, & Lebmman, (2015)
2. These processes are influenced by personal conversion factors (metabolism, personal histories, health, reading ability, etc.), socio-political conversion factors (social norms, tourism policies, political hierarchies, etc.), and environmental conversion factors (geography, climate, etc.; Robeyns, 2005)
3. Non-generative empowerment may be described as a ‘zero-sum game’ (i.e., empowerment of one involves disempowerment of another)

empowerment “that lead people to perceive themselves as able and entitled to make decisions” (Rowlands, 1997, p. 14), indicating an increased awareness of rights, self, or ways for combating internalized oppression and other forms of domination.

While studies tend to categorize these four types of power separately for explanatory purposes, it is important to note that they are interrelated and may build on or detract from each other through mutually or cyclically empowering/disempowering processes. Table 3.1 describes the four types of power and related processes of empowerment that will guide the analysis presented here.

STUDY CONTEXT

The ‘rediscovery’ of Machu Picchu by Hiram Bingham of Yale University in 1911 – quickly followed by an expansive report on the site by National Geographic in its April, 1913 issue – stirred the ‘geographical imaginations’ of people everywhere and began attracting tourists to the region as early as the 1920s (Gomez-Barris, 2012; Massey, 2006). By the 1950s – after the Peruvian government had built up some much-needed infrastructure in the area – visitors began to arrive “en masse, transforming the nation’s heritage into raw material for tourist consumption” (Gomez-Barris, 2012, p. 4).

International tourist arrivals in Peru saw a 380% increase between 1995 and 2010 (UNWTO, 2012), and the number of annual visitors to Machu Picchu topped one million for the first time in 2012 (Peruvian Times, 2014). On their way to Machu Picchu, most visitors pass through the city of Cuzco (population of 413,000 in 2013; INEI, n.d.), where approximately 1,200 travel and tourism companies are presently registered and serving visitors (DIRCETUR, 2013). In view of upward trends in tourist arrivals to the region, plans are in place to construct a

new international airport just 30 minutes outside Cuzco in the town of Chinchero (BBC, 2012; CAPA, 2014). This development will afford visitors easier access to rural communities located between Cuzco and Machu Picchu, generating continued change in the area's political/geographical landscape, economy, and culture.

Around Cuzco, community-based tourism has been promoted as a means for eradicating poverty through the empowerment of people living in rural areas (Casas-Jurado, Domingo, & Pastor, 2012). Since 2006, these efforts have been undergirded by a national-level focus on TRC and its related forms (e.g., agricultural tourism, ecotourism, homestay tourism, indigenous tourism, cultural tourism) in order to generate economic, environmental, social, and cultural benefits for indigenous and mestizo communities, which tend to be characterized by higher degrees of poverty than urban centers (Casas-Jurado et al., 2012; MINCETUR, 2006).

Intrepid Travel, headquartered in Melbourne, Australia, is one of the many tourism companies promoting TRC in the Cuzco region. After a 2011 merger with Touristik Union International (TUI) of Germany, Intrepid is now part of the PEAK Adventure Group – said to generate annual revenues of circa 400 million AUD while providing tours for an estimated 350,000 passengers across all seven continents (Hawkes, 2011). Intrepid alone has set up local partnerships or joint ventures in 22 nations – employing close to 1,000 people globally and emphasizing small-group, grassroots, responsible travel throughout its operations (Intrepid, n.d.).

Traveling from Cuzco to Machu Picchu, Intrepid groups are limited to 16 passengers and are led by a local (Peruvian) guide. Intrepid has working agreements with four rural, Quechua³ communities situated in or near the so-called *Valle Sagrado* (Sacred Valley). These communities include *Chichubamba*, *Amaru*, *Sacaca*, and *Qorqor*, each located about an hour from Cuzco by

car and ranging in size from 50 to 220 families (Figure 3.1). Traditional livelihoods in these communities include agriculture (potato, barley, fava beans, and quinoa are commonly grown), animal husbandry (chickens, cattle, sheep, and Guinea pig are commonly raised, traded, sold, and consumed), floriculture, textiles, and ceramics. Other livelihoods include transportation, public works, merchandising, and tourism.

Intrepid Travel works with only one tourism association in each community such that, upon arrival, Intrepid passengers interact with only those individuals who are part of that association. During their visit, passengers eat a locally prepared lunch, learn about and



Figure 3.1. Location of the four communities working with Intrepid outside of Cuzco (adapted from *Trekking Peru, 2014*).

potentially participate in the indigenous people's way of life (e.g., tilling soil, feeding the Guinea pigs, etc.), and have the opportunity to purchase crafts or textiles from members of the tourism association with which Intrepid works. Visits to these communities by Intrepid groups never entail overnight stays; they occur between one and five times per week, take place around lunch, and last for two to three hours at a time.

Methods

Data for this study were collected using rapid qualitative inquiry (RQI) from June through December, 2013. RQI has been described as intensive, team-based, qualitative inquiry based on a case study approach using multiple techniques for data collection and iterative data analysis and additional data collection to quickly develop a preliminary understanding of a situation from the insider's perspective (Beebe, 2014). Because too much emphasis on local participation can lead to increased burden on communities while causing outsiders to relinquish responsibility, the explicit purpose of this approach is to produce results for outside entities and decision makers like local government representatives in the Cuzco region, Intrepid guides and staff in Peru, or Intrepid staff headquartered in Melbourne.

Purposeful sampling was used to conduct a total of 93 semi-structured interviews of community households involved in tourism ($n = 47$), households not involved in tourism ($n = 29$), Intrepid guides ($n = 12$), and government representatives ($n = 5$) (Coyne, 1997). For selecting individuals to interview in each community, maximum variation was stressed in terms of geographical location and gender, and phenomenon variation was based on respondents' involvement (or not) in tourism (Sandelowski, 1995). Questions explored local perceptions of tourism-related change, the processes leading to tourism association formation in each

Table 3.2.

Overview of tourism associations and data collection methods by community.

Characteristic	Community			
	Chichubamba	Amaru	Sacaca	Qorqor
Approx. population	684	1,010	655	200
Approx. elevation	2,870m	3,800m	3,450m	3,900m
Name of tourism association ¹ working with Intrepid (year formed)	<i>Asociación de Agroturismo</i> (2005)	<i>Comité de Mujeres, Amaru</i> (2008)	<i>Asociación Sumaq Warmi</i> (2012)	<i>Asociación Munay Ttica</i> (2013)
Year association began receiving Intrepid groups	2008	2010	2010	2013
# of members (2013)	14	12	12	24
Percent female members	79%	83%	75%	92%
Estimated number of Intrepid visitors (2013)	800	350	227	515
Tourism season	Year round	April – December	April – December	Year round
Source of equally-distributed income	none	Lunch	Lunch	Lunch
Source of individual income	Lunch and workshop revenues	Hand-woven textiles	Hand-woven textiles	Hand-woven textiles
Price of lunch for visitors ²	15 soles (6 USD)	15 soles (6 USD)	15 soles (6 USD)	25 soles (9 USD)
Average monthly tourism income per associate	190 <i>soles</i> (70 USD)	54 <i>soles</i> (20 USD)	63 <i>soles</i> (23 USD)	40 <i>soles</i> (15 USD)
Weeks spent in community	4	3	3	4
# of semi-structured interviews	27	24	23	19
# of Intrepid visits observed	8	2	1	5

1. Chichubamba and Sacaca had only one tourism association operating in their respective communities as of 2013, while Amaru had a total of four and Qorqor had a total of two.
2. Exchange rate of 1 USD = 2.7 nuevo soles; all lunch prices cost 5 soles extra (~1.85 USD) if visitors wished to eat *cuy* (Guinea Pig); the association in Qorqor charged more than other communities, preparing an Andean Buffet that offered an array of local foods rather than just soup and a main dish.

community, factors inhibiting or encouraging local people's involvement in tourism, views of poverty and well-being, and concerns and suggestions related to TRC in each community.

Interviews lasted anywhere from fifteen minutes to one hour and were transcribed from Quechua or Spanish into English. Responses were triangulated with other data sources which included field notes, participant observation, and tourism documents from Intrepid, local government, and community associations (Decrop, 1999).

Content analysis of the interviews, triangulated with other data sources, allowed for the identification of processes of empowerment (e.g., an increased ability to pay for children's education or to network with tour companies) and factors encouraging or inhibiting those processes in each community. This analysis involved the coding of transcribed interviews into thought units and associated themes based on categorical distinctions (Krippendorff, 2013, p. 106), which were subsequently linked to Rowlands' (1997) power typology. Focus was placed on ways in which tourism association members, in particular, were either influenced by or responsible for processes of empowerment (or disempowerment) in each community. Table 3.2 provides a brief description of the four communities, the four tourism associations partnering with Intrepid, and the research methods employed.

RESULTS

Non-Generative Empowerment – Enhanced Domination

Varied expressions of power as domination were linked to tourism association members in each community. These expressions represented the use of 'power over' and were observed through interactions that ostensibly led to the empowerment of some and the disempowerment of others. In particular, three themes that emerged as expressions of 'power over' in the four

communities related to the scheduling of visits by Intrepid, the role of tour guides in shaping TRC markets, and decision-making processes benefiting local elites (Mowforth & Munt, 2009).

The scheduling of visits occurred through a decision-making process led by an Intrepid staff member in Cuzco named Rita who appeared to possess and exert a tremendous degree of ‘power over’ – determining both when Intrepid groups would visit communities and which communities would be visited. Tourism association members in each community depended on Rita to provide them with a monthly visitation schedule, making trips from their communities into the city of Cuzco to meet with her and retrieve the document. Unfortunately, communication with Rita was often difficult, causing many association members to waste their time and money traveling to Cuzco only to find that the schedule was not ready or that Rita was unavailable to meet with them. Rita’s ability to dominate the scheduling process was exemplified by her decision to ‘punish’ the tourism association in Sacaca, sending them no Intrepid visitors for the entire month of October because Intrepid guides had been finding it difficult to reach the association president by cell phone. The ostensible disempowerment of association members in all four communities through Rita’s actions may be summed up by a comment made by an association member from Chichubamba:

Rita from Intrepid treats the Association like a dog and certain associates like dirt beneath her feet; there should be more conversation and communication and mutual respect. (CI-7)

Intrepid guides also appeared to possess and exert ‘power over’ in determining the way TRC occurred in each community. The role of tour guides as brokers of power has been explored elsewhere (Cheong & Miller, 2004; Cohen, 1985). Ypeij (2012) suggests that English-speaking tour guides working outside of Cuzco control the interactions between tourists and indigenous

people, attempting to “give tourists a special experience in hopes of earning money” (p. 27).

Intrepid guides exerted a kind of power as domination by controlling many aspects of TRC markets (e.g., number and type of interactions between tourist buyers and local sellers) in each community. While Rita decided which communities would be visited by Intrepid groups, the guides had the power to decide an array of other aspects of group visits, including:

1. whether groups would actually reach communities at all (e.g., if one passenger was sick, guides often chose to forego community visits entirely),
2. whether stops would be made at other markets before reaching communities,
3. which homes in the communities might be visited (as in the case of Chichubamba, where lunches and workshops were held in association member homes rather than in a common meeting place), and
4. what information would be shared with the visitors when purchasing products (e.g., that a blanket selling for USD \$110 had taken 30 days to weave by hand).

One Intrepid guide stated, “*There are [Intrepid] guides who look for any possible excuse to avoid visiting a community*” (IS-4). Decisions to not visit communities appeared to disempower tourism association members in a variety of ways. An associate in Amaru pleaded, “...*may [the guides] not fail us, because it makes us sad – being all ready to cook, but no one showing up. It demotivates us*” (AI-3). Controlling interactions between associations and visitors, then, represented a kind of ‘power over’ materialized in guides’ influence over TRC market interactions.

Tourism association members were not merely the recipients of power as domination; they were also its purveyors. This was especially clear in the case of Amaru, where four tourism associations dominated decisions made during the community’s monthly assemblies.

Expressions of ‘power over’ were materialized in three decisions that ostensibly supported the realization of association interests over those of non-tourism association members, including:

1. promoting the enforcement of an agreement from 2005 that all homes in Amaru be ‘improved’ for tourism (e.g., adorning home exteriors with Inca/indigenous designs, cleaning up cooking and dining areas, expanding homes with additional rooms for potential overnight visitors, placing decorative plants about the home, etc.)
2. requiring dogs to be kept inside (promoting Amaru as a safe, dog-free zone⁴ for tourists),
3. demanding that one bag be filled with trash and brought to Amaru’s monthly gathering in order to participate in the assembly, keeping the community clean for tourism.

Such expressions of power as domination by tourism association members was visible in different ways in other communities, leading to conflict within associations themselves (as in the case of Chichubamba) or to conflict between tourism associations (as in the case of Qorqor).

Without going into more specific detail here, it is important to note that those working in TRC in each community were both recipients and purveyors of ‘power over’.

Generative Empowerment – Enhanced Agency, Collectivity, and Self-Awareness

While various expressions of power in communities were representative of non-generative processes of empowerment, local accounts of TRC and certain interactions with Intrepid Travel or local government were also suggestive of generative processes. These processes were most visible among tourism association members working with Intrepid Travel and did not generally characterize communities as a whole. Analyses of interviews and other data sources revealed several themes related to enhanced agency, collectivity, and self-awareness among tourism association members.

With respect to enhanced agency ('power to'), empowerment stemmed primarily from an increased command over economic resources, which generated opportunities of various kinds for tourism association members. An increased capacity to improve their quality of life and to educate their kids represented the most commonly referenced aspects of empowerment through TRC for association members. During an association gathering in Chichubamba, for example, one associate said, "*Before [Intrepid visits], we had enough money to survive. Now, we have enough money to improve*" (CI-1). An associate in Amaru referred to the way in which tourism had enhanced her ability to purchase food (as opposed to trading for it): "*...with the income from tourism I can buy basic necessities like sugar and rice. Before, it was very sad; we would exchange products in the market and we only did trueque*⁵ (AI-5). In Sacaca, an associate linked TRC to increased income and agency:

Rural, home-stay tourism is a complementary job. Here, we don't produce our crops to sell or to export. We don't have luxuries, but we have food to eat. You can earn 15 soles (6 USD) per day working for someone in the fields, but with tourism you can earn more. With tourism we receive an income – economic support – and we can improve our quality of life. (SI-8)

In Qorqor, an associate alluded to the commonly expressed interest in using tourism income for educating children, stating, "*I am nothing, from nothing. I'm just a farmer. But I want my kids to become something more, to learn how to be technologists in agricultural science, or administrators. That's why we want to educate our kids, and tourism will help us do that*" (QI-8). In general, local perceptions suggested that involvement in TRC and specific interactions with Intrepid Travel had made the realization of personal goals more effectively possible.

With respect to enhanced collectivity ('power with'), generative empowerment was observed as an increased ability for tourism association members to realize collective interests to support association members or even non-members in need. This enhanced collectivity was realized when a tourism association member's home burned down in Chichubamba, and other association members pooled TRC funds and came together to support him in its reconstruction. Also in Chichubamba, one tourism association member who had been crippled by a bout with polio earlier in life was unable to cook lunch for visitors on his own. Other members of his association consistently helped him cook lunch when he requested their assistance, recognizing and addressing another's interests beside their own. In Sacaca, the association president alluded to a collective goal "*to escape crisis*" (SI-2) through TRC, saying that the tourism association was working in tourism to provide jobs for others in the community while helping "*to feed and to educate our kids, to improve our homes, and much more*" (SI-2). One older woman in Qorqor, who had not been working in tourism and whose husband had recently died, was encouraged by women from the tourism association to join them (even though it could mean less income for themselves), since TRC would not be as physically strenuous as farming or taking care of her sheep. In each of these cases and others, expressions of 'power with' highlighted a kind of generative empowerment in which tourism associations acted collectively and cohesively to empower others, meet recognizable needs, and create positive change in their communities.

Finally, with respect to enhanced self-awareness ('power within'), TRC appeared to contribute to processes of empowerment for association members in the form of increased conscientization, confidence, and happiness and respect felt by women. This kind of empowerment among marginalized peoples often requires that they "not only critically *reflect* upon their existence but critically *act* upon it" (italics added; Freire, 1970, p. 109). A tourism

association member in Amaru alluded to this process by describing a particular concern related to his association's interaction with Intrepid: "*We are waking up with tourism and we are walking forward...What is lacking is reflection; we need to think about our rights and our responsibilities*" (AI-1). 'Waking up' through work in TRC seemed to contribute to increased confidence for many association members. During a meeting with several Intrepid guides in Cuzco, one of them stated, "*The women in Chichubamba used to be very timid, and they could barely interact with visitors. But many of them have become more confident and they have learned to speak out*" (IS-5).

As this quote suggests, enhanced 'power within' seemed to be an especially significant theme among female association members. The husband of an association member in Qorqor stated:

Before, the women didn't have any income from their animals, from agriculture, or from their crafts. But now they have a business and they earn something. My wife used to remain by herself and didn't work much with the other women. Now, she feels better because she works with the others. She is more involved now in the community, working with the association. (QI-10)

Female association members also reported being happier ("*Now, with tourism, we have changed. When we are alone at home, we feel sad. But when we are all together – sitting down – we laugh, we play, we talk*"; QI-1) and experiencing more respect from their husbands ("*Before, our husbands would come home drunk and say to us, 'What have you done today? You haven't worked.' But now we can say to our husbands that we have our own income*"; AI-4). Some women suggested that they participated in TRC not because it brought more money than other jobs (e.g., working in agriculture), but quite simply because it was more fun for them. In general,

the increased confidence, happiness, and respect for women represented forms of psychological empowerment (Friedmann, 1992; Ramos & Prideaux, 2014; Scheyvens, 1999) for association members that might not have occurred as readily in the absence of opportunities to work in TRC or to interact with Intrepid Travel.

Conversion Factors Influencing Empowerment

While assessing particular expressions of power may be important for CBT studies on a theoretical level, evaluating contextual elements that hinder or promote the empowerment of local people holds decidedly practical significance. Robeyns (2005) suggests that “for political and social purposes it is crucially important to know the social determinants of the relevant capabilities, as only those determinants (including social structures and institutions) can be changed” (p. 110). Understanding personal and environmental determinants of empowerment processes may also hold practical significance, even though they may not be changed as readily as socio-political factors. This study thus seeks not only to identify particular expressions of power characterizing TRC in the four communities under consideration, but also to identify personal, socio-political, and environmental conversion factors that may be helping or hindering the empowerment of local people.

An exhaustive list of conversion factors influencing local empowerment can never be created; however, it is worth noting several key elements related to the communities in this study. On a personal level, many association members recognized – as Renalda did in the opening quote – the roles of will-power and perseverance in benefiting from tourism. A man in Qorqor suggested, “*In order to work with tourists, you have to have voluntad (will). If you don’t have voluntad, well, it can’t be done. You have to have a vision toward the future and to decide*

what you're going to do" (QT-3). An associate in Chichubamba said, "*Some association members think the association president should be fighting for everyone, but people need to mobilize themselves...Every one of us has to invest our time and money to improve*" (CI-2). Another factor on the personal level related to people's personalities. As an associate in Chichubamba reflected, "*Many association members are timid and don't make their voices heard. They are quiet and often afraid to speak up both among other associates and when interacting with outside businesses/agencies. But some are far more outspoken*" (CI-6). Personal history (e.g., husbands working previously as porters on the Inca Trail), gender, and physical health also represented significant factors influencing empowerment through TRC in this study.

Particular socio-political conversion factors were similarly significant. At the associational level, weak institutional norms that failed to recognize communal goals or the needs of others contributed to increased competition and individualization in the market. Ruiz-Ballesteros & Hernández-Ramírez (2010) allude to these processes in CBT:

The market undermines the communitarian link if it promotes individualism as the exclusive rule of participation. But if the common aspect, the community, is shaped as the main agent in the [tourism] business...the market can promote the collective. (p. 223)

Emphasis on individualization and competition over associational or community solidarity occurred in Chichubamba more than in the other three communities. In Chichubamba, a non-governmental organization (NGO) had encouraged association members to develop individualized businesses in 2005 to earn money through TRC. By the time of this study, significant internal conflict had eroded association cohesion, ostensibly diminishing generative forms of empowerment. As a non-association member reflected, "*There is some division between the association and others here because the associates don't participate in tourism with the*

community in mind. Instead, they have become fairly individualized, making improvements for themselves" (CN-7). Increased competition and individualization thus appeared to influence processes of empowerment in Chichubamba.

In addition to local-level determinants (e.g., associational/communal), broader political constraints seemed to be inhibiting processes of empowerment in all four communities. One particular constraint for non-association members who wished to work in TRC was the legal requirement that association members be registered with the government. The process of forming tourism associations created a tangible division between those who had formally registered with the Peruvian state to work in TRC and those who had not, disrupting traditional practices through external political intrusions.

Besides personal and socio-political conversion factors, several environmental characteristics influencing processes of empowerment are worth noting. First, the location of homes in Chichubamba created a geographical division among certain association members. Those with more accessible homes (about half of the members) were being visited by Intrepid groups more frequently, restricting opportunities for those farther back. The location of the communities themselves was also a significant conversion factor influencing TRC in communities. Chichubamba and Qorqor, for example, were more easily accessed by Intrepid vans headed from Cuzco to Machu Picchu. On the other hand, Sacaca and Amaru were more remote and could only be reached by driving up an unpaved mountain road that was often unsafe during the rainy season (from December to March). Associations in Chichubamba and Qorqor thus received the lion's share of visitors throughout the year due to a combination of factors related to location, climate, and infrastructure. Emergent themes/aspects and quotes related to processes of empowerment and concomitant conversion factors are provided in Table 3.3.

Table 3.3.

Processes of empowerment and conversion factors linked to TRC in communities.

	Emergent Themes/Aspects	Quote
Processes of Empowerment ¹		
Enhanced Domination	Scheduling process controlled by outsiders; guides controlling markets; local elites controlling association or community decisions	<i>We feel somewhat expelled/ excommunicated from the group...If Intrepid groups or tourists only visit the homes of other association members, my question is, Why does the Association even exist? What are we [from farther back] – just paint and decoration?</i> -Association member (Chichubamba)
Enhanced Agency	Tourism association members have increased ability to educate kids and enhance their quality of life	<i>My home was hardly normal before tourism – almost extreme poverty. I never thought that tourists would visit this community or the people here because we were poor... Actually, what I mean to say is that tourism has helped us improve the quality of life for us, our kids, and for the future.</i> -Association member (Chichubamba)
Enhanced Collectivity	Tourism association members collectively acting to support marginalized people (women, the sick, the elderly); collectively addressing needs of association members/non-members	<i>In five years, I see us as a business: with accounting, administration, contracts. We'll be able to help orphans, the elderly, and others in need, so they can have a good life. We'll be able to teach others how to speak English once we learn it ourselves. [The association] can benefit our community – that's my vision.</i> -Association member (Sacaca)
Enhanced Self-Awareness	Tourism association members 'waking up' and more confident through TRC; female members less timid, happier, and receiving greater respect from their husbands	<i>Now, we're looking for ways to learn more about tourism, to improve, to prepare ourselves more for the future when the international airport is finished in Chinchero. We want to get involved in something, so that we aren't caught like we are now.</i> -Association member (Qorqor)
Conversion Factors		
Personal	Will-power; personal history; personality; gender; physical health	<i>With so much sacrifice, we can't lose. Many others have quit because they don't have time. There are still many things to do to survive, but we won't surrender. We press onward.</i> -Association member (Sacaca)
Socio-political	Associational/community cohesion and norms; external pressures (e.g., national tourism policies)	<i>Young people currently hold positions of authority here and the elderly are isolated in the assemblies. We participate, but we have neither voice nor vote.</i> -non-association member (Amaru)
Environmental	Location of homes; location of community; climate; infrastructure	<i>We just want the groups to come more often to the end of the road to visit our home!</i> -Association member (Chichubamba)

1. Tourism association members working with Intrepid experienced empowerment through enhanced domination, agency, collectivity, and self-awareness. Tourism association members experienced disempowerment through interactions with Intrepid staff, in particular. Non-tourism association members in communities experienced disempowerment to varying degrees through the coercive actions of tourism associations.

CONCLUSION

This study has analyzed processes of empowerment pertaining to TRC and factors influencing those processes in four rural communities outside Cuzco: *Chichubamba*, *Amaru*, *Sacaca*, and *Qorqor*. Findings highlight the complexity of such analyses, suggesting that TRC as a special form of CBT may lead to the simultaneous empowerment and disempowerment of individuals in communities, depending on particular expressions of power as domination, agency, collectivity, or self-awareness and on site-specific arrays of personal, socio-political, and environmental conversion factors.

The nature of non-generative empowerment within communities was represented by expressions of ‘power over’ that led to an apparent *cascade of disempowerment* passed down from above (i.e., from government, NGOs, and travel companies, to tourism association members, to community members not working in tourism). These processes appeared to influence tourism associations from within, as well. In the absence of associational or community cohesion, external or elite interests appeared more likely to prevail over the interests of more marginalized groups, highlighting a kind of depotentia through tourism (Hall, 2013) in which a consenting majority adopted the preferences of others as their own, fueling the empowerment of a select few. Salaazar (2012) describes this process in CBT development:

The main issue centers around the conflict that arises over the planning of the growth and development of tourism where local participation is encouraged by [external] agencies, but a vociferous minority, in favor or against, influences decisions, the silent majority remaining unheard, suggesting a passive but tacit acceptance. (p. 12)

In this study, such tacit acceptance was observed both in the lack of influence by non-tourism association members over community decisions (e.g., in Amaru), and in association member

accounts of perseverance and struggle to benefit from TRC by ‘doing as they were told’, as highlighted by Renalda’s comments in the introduction.

Empowerment as enhanced ‘power to’, ‘power with’, and ‘power within’ was also observed in communities. These generative forms appeared to provide association members, in particular, with increased agency in combating expressions of power as domination. This was perhaps most visible in regards to the empowerment of women through TRC, who appeared to experience increased agency and self-awareness against a host of socio-political constraints characterizing rural, indigenous/mestizo communities in the region.

A clear limitation of this study involves the treating of various expressions of power as distinct categories, when significant overlap may exist between them. Future studies may thus seek to build on the approach presented here to theoretically explore the potential interactions between generative and non-generative processes of empowerment. Issues to be considered might include whether tourism association members or non-members have more opportunities through tourism and whether they perceive themselves as more or less able to achieve their personal interests and goals as a result of *others* participating in TRC in their communities, or as a result of non-community actors influencing local tourism practice (e.g., municipal government representatives).

On a practical level, the findings here draw attention to the need for CBT studies and others concerned with the tourism-poverty nexus to consider not only expressions of power, but also conversion factors that may be hindering or encouraging empowerment for local people. Based on these considerations and local perceptions and interests, a cyclical framework for future studies might be proposed, comprised of a four-step process incorporating 1) local perceptions of TRC (e.g., histories, outcomes, relations, motivations, concerns); 2) micro-scale

processes of empowerment for association members through enhanced domination, agency, collectivity, or self-awareness; 3) potential personal, socio-political, or environmental conversion factors influencing those processes; and 4) proposed/implemented changes to enhance TRC and promote generative empowerment. Beyond maintaining the status quo within communities through *sustainable* tourism development, this study emphasizes the need to promote more generative processes of empowerment through tourism in combating dominant expressions of power often prevalent in CBT contexts.

Endnotes

1. Names of people interviewed and others involved in this research have been altered for anonymity. However, place names and associations have not been altered, since “ensuring complete anonymization... may be an impossible task, particularly if researchers are to fully appreciate the importance of context in the reproduction of social process, structures, and everyday life” (Clark, 2006, p. 17; Tilley & Woodthorpe, 2011).
2. Sen (2002), in responding to several critiques that the capability approach focuses too much on individual capabilities while ignoring collective/social elements, concedes that individual capabilities are indeed *socially dependent*. Later studies (e.g., Ibrahim, 2006) eventually led to the addition and application of collective capabilities (Pelenc, Lompo, Ballet, & Dubois, 2013; Scarlato, 2013), which are considered in this study to be the opportunities available *to individuals* as a consequence of their membership in a collective (e.g., a tourism association). Here, ‘power to’ is thus linked to enhanced agency as a result of increased individual or collective capabilities – both of which would be measured at the individual level (as opposed to ‘power with’, which would be measured at the group level and representative of collective power).
3. While the civilization that constructed Machu Picchu is often referred to as *Inca*, this is a misnomer. Inca actually means ‘king’ or ‘ruler’ in the indigenous language of Quechua. Quechua is still a dominant language in rural areas of the Peruvian, Ecuadorian, Bolivian, and Chilean Andes. It is also a more appropriate descriptor for the society and civilization being considered in this study.
4. While it may seem trivial, keeping dogs inside was a significant consideration in Amaru and other communities. Dogs represent a noticeable health risk not just for visitors, but

for local people. One of the tourism association members in Chichubamba, in fact, had been attacked and bitten by a dog just prior to the arrival of the research team. The incident required an operation followed by a month of painful recovery.

5. *Trueque* is a term describing traditional trade/bartering practice among Quechua peoples.

CHAPTER IV

LOCAL STRATEGIES FOR UNLOCKING OPPORTUNITIES THROUGH INSTITUTIONAL CHANGE: LESSONS FROM PERU'S SACRED VALLEY

OVERVIEW

Pro-poor tourism studies often highlight the need for altering structural restraints and creating policies that enhance freedoms for the poor. However, few studies have evaluated specific strategies by which the poor seek to reflexively alter such restraints to improve their lives within shifting tourism arrangements. This study applies Jessop's strategic-relational approach to analyze the cases of two tourism associations in Peru's *Valle Sagrado* (Sacred Valley), qualitatively assessing local-level strategies for addressing specific institutional concerns. Sen's capability approach is subsequently applied to assess the potential for these strategies to improve individual and collective functioning for associations and their members. Findings draw attention to a kind of institutional poverty alleviation that may occur when identifiable institutional limitations are strategically altered by local people, contributing to enhanced functioning. This article suggests that pro-poor tourism studies may benefit from considering poverty alleviation as both an *opportunity-dependent* and an *opportunity-generating* process, stressing the interplay between structure and agency as local people maneuver to improve their lives through institutional change.

INTRODUCTION

Poverty has become an *idée fixe* in the West and its eradication represents a growing international concern. The tourism industry has not been exempt from the influence of these trends. As the actions and institutions of Earth's 7.2 billion people become increasingly linked within a \$90 trillion global economy (Sachs, 2014), tourism has received mounting attention as part and parcel of pro-poor growth and sustainable development (Mowforth & Munt, 2009; Holden, 2013).

Nowhere is the link between tourism and poverty more plainly stressed than in a relatively new approach to tourism known as pro-poor tourism (PPT). This approach, developed in the late 90s, explicitly seeks to unlock opportunities for the poor through purposeful institutional change across multiple scales of government, industry, and the voluntary sector (Ashley, Boyd, and Goodwin, 2000; Ashley & Roe, 2002; Goodwin, 2008; Scheyvens, 2011; Scheyvens & Russell, 2012; Van de Mosselaer & Van der Duim, 2013).

Proponents of PPT suggest that these changes may come through specific adjustments in government policies and tourism practices leading to a 'tilting of the cake' and increased involvement of the poor in tourism chains (Bennett, Roe, & Ashley, 1999; Goodwin, 2008; Roe & Urquhart, 2001; Mitchell, 2012). Critics of the PPT agenda argue that, if tourism is to benefit the poor at all, mere adjustments are not enough. Instead, arrangements must be overhauled and then redirected to "address the structural reasons for the north-south divide, as well as internal divides within developing countries" (Hall, 2007, p. 4).

Such changes within spaces of government and industry may be necessary for tourism-based poverty alleviation to occur, but the poor themselves appear to play an equally important role as "active agents of change" – taking part in transforming the relations or processes that

affect them (Scheyvens, 2011, p. 23). Assessing whether such transformations lead to greater benefits for the poor will require ongoing analysis of the interplay between macro-scale institutional dynamics and micro-scale action by individuals and community-level associations (Bramwell, 2011). Considering the relationship between structure and agency in this fashion may contribute to a more holistic understanding of the potential for tourism to alleviate poverty (Erskine & Meyer, 2012).

The purpose of this article is to analyze how institutional constraints and the concomitant actions of individuals maneuvering to alter those constraints may contribute to poverty alleviation for tourism association members in two communities of Peru's *Valle Sagrado* (Sacred Valley). Jessop's (2008) strategic-relational approach is applied to highlight the potential influence of the Peruvian state and local-level strategies in the history and evolution of these tourism associations, and Sen's (2000) capability approach is used to evaluate whether these shifting arrangements may be enhancing freedoms for local people.

The article begins with an overview of Jessop's (2008) strategic-relational approach and institutional analysis. It then discusses the themes of structure and agency in conceptualizations of poverty alleviation as freedom enhancement (Nussbaum, 2011; Sen, 2000) – a view that has received relatively little attention in tourism studies (see Croes, 2012; Dissart, 2012; Van de Mosselaer & Van der Duim, 2013). The cases of two tourism associations in the Valle Sagrado are then presented to highlight ways in which specific institutional arrangements may be evolving as a result of strategic maneuvering to unlock opportunities for local people. Finally, a closing discussion is provided on the potential for such actor-driven, institutional change to contribute to tourism-based poverty alleviation.

INSTITUTIONS AND THE STRATEGIC-RELATIONAL APPROACH

Institutions have been described as social constructs produced and reproduced through human interaction and comprised “of written rules as well as typically unwritten codes of conduct that underlie and supplement formal rules” (North, 1990, p. 4; Berger & Luckmann, 1967). They are often seen as structural features (either formal or informal) comprised of groups of individuals who engage in patterned, predictable behaviors that are dependent on specified relationships (Peters, 2012, p. 19)

A long history of institutional analysis in the social sciences has placed particular emphasis on the struggle for power in the emergence, constitution, and influence of the nation-state as a governing structure charged with deciding who gets what, when, and how (Lasswell, 1936; Foucault, 1978; Jessop, 2008). Other studies have focused on institutional dynamics and related action influencing the evolution of smaller-scale social enterprise, or of supranational organizations like the United Nations (Scarlato, 2013; Spires, 2011; Stone, 2011). Moving beyond predominantly structural analyses (e.g., Weber’s ‘iron cage’ of bureaucracy), studies have shifted toward a so-called ‘new institutionalism’ since the late 70s to highlight the complex interplay between individual and collective action, broader socio-political pressures, and institutional change (Meyer & Rowan, 1977; Peters, 2012; Weber, 1905).

Pastras & Bramwell (2013) incorporate new institutionalism in their analysis of the state’s involvement in tourism marketing in Athens, Greece. They describe six considerations that have characterized this approach in the literature. These include the relational character of institutions; the recursive nature of institutions as relatively stable social practices influencing and influenced by actors; visible organizational structures and less visible conventions and values influencing power dynamics; the duality of agency and structure; the spatial scale of

influence of government institutions; and historical trends which “structure relational opportunities and constraints” (p. 394), where institutional path dependence and path shaping are influenced by ongoing social relations.

Many of these elements – and the concepts of path dependence and path shaping, in particular – represent key features of Jessop’s (1985; 1989; 1990; 1996; 2001; 2008) strategic-relational approach to institutional analysis. Aligning with Giddens’s (1984) structuration theory, the strategic-relational approach seeks to bring structure into agency and agency into structure rather than provide separate and often deterministic analyses of these phenomena. Jessop builds on structuration theory by emphasizing the dynamic and strategic processes behind institutional change, where decisions are both ‘calculated’ by reflexive agents and ‘selected’ (in an evolutionary sense) by the institutional context. Jessop (2001) writes:

One way to go beyond the duality of structuration theory is to examine structure in relation to action and action in relation to structure, rather than bracketing one of them. Structures are thereby treated analytically as strategic in their form, content, and operation; and actions are thereby treated analytically as structured, more or less context sensitive, and structuring. (p. 1223)

Here, the process of institutionalization becomes co-constituted by acting structures and structuring actors such that certain strategies and institutional arrangements appear privileged over others, contingent upon specific spatio-temporal contexts and socio-political factors.

This favoring of certain actions and arrangements is highlighted in the strategic-relational approach by the concepts of ‘strategic calculation’ and ‘strategic selectivity’ (Jessop, 1996; 2008). Strategic calculation refers to actors’ tendency to mobilize their (limited) understanding of the myriad factors constituting a given institutional context to reflexively evaluate, pursue,

solidify, or alter particular structural dynamics within that context. Actors may weigh a variety of possibilities before making decisions leading to institutional change, “so that in these processes there are dialectical relations between the ideational and the material” (Pastras & Bramwell, 2013). The perceptions, interests, and values of each actor – coupled with an incomplete knowledge of other actors and the institutional context – hold notable sway in the strategic calculation of potential and eventual courses of action.

At the same time, Jessop suggests that these actions may be influenced by the environment or institutional context itself. The concept of strategic selectivity highlights “the tendency for specific structures and structural configurations to reinforce selectively specific forms of action, tactics, or strategies and to discourage others” (Jessop, 2001, p. 1224). The strategically selective context doesn’t determine which strategies are employed, but does favor the realization of some actions over others. A ‘structural moment’ (i.e., *constraint*) consists of those elements of an institutional context that cannot be altered by agents pursuing a given strategy under certain spatio-temporal conditions. Conversely, a ‘conjunctural moment’ (i.e., *opportunity*) consists of those elements of an institutional context that can be changed (Jessop, 1996).

While the strategic-relational approach represents one way for analyzing dynamic actions and structures within state-level governance and tourism policy (Pastras & Bramwell, 2013), the approach has also been applied to evaluate core-periphery relationships and the co-evolution of smaller-scale institutions (Chaperon & Bramwell, 2013). This study builds on the latter approach by assessing the strategically selective configurations of small-scale (e.g., community-level) institutions alongside the strategies of calculating and reflexive actors wishing to address specific

institutional concerns. Consideration is given to the potential for these processes of institutional change to alleviate a kind of *institutional deprivation* through unlocked opportunities.

The dynamic interplay between institutional constraints and opportunities and individual or collective action relates to Sen's (2000) capability approach to evaluating poverty and its alleviation. While studies on pro-poor tourism (PPT) make frequent (though often implicit) references to Sen's capability approach in describing tourism's potential to "unlock opportunities" or "enhance freedoms" for the poor, few studies have explicitly considered the complex ways in which evolving institutional arrangements may influence and be influenced by actors to alleviate poverty in terms of enhanced freedoms. These factors and the roles of structure and agency, in particular, are now considered as they relate to Sen's capability approach to development.

The Capability Approach

In contrast to traditional views linking development to poverty alleviation via economic growth, Friedmann (1992) describes development in terms of social, psychological, and political empowerment with a focus on ensuring marginalized people have access to society's myriad resources (Yosef, 1994). Empowerment has been emphasized in the context of tourism to stress the importance of institutional change leading to increased local control over resources and decision-making processes (Ramos & Prideaux, 2014; Scheyvens, 2002; Timothy, 2007).

Such an emphasis on empowerment is related to Sen's conceptualization of poverty alleviation as freedom enhancement. The capability approach draws attention beyond the mere means to achieve (e.g., money) and emphasizes people's opportunities (i.e., *capabilities*) to live lives they have reason to value (Sen, 1985a; 2000). According to Croes (2012), "capabilities

refer to the ability of an individual to function, to seize opportunities, to make choices, and to take actions” (p. 543). The realization of a particular capability is referred to as a *functioning*, and people’s functionings may be used as “the evaluative focus” to discursively assess levels of individual deprivation (Sen, 2000, p. 75; Naussbaum, 2011). In this way, poverty alleviation may be described in a relative sense in terms of unlocked opportunities or enhanced freedoms by identifying improvements in various functionings such as improved living conditions, increased levels of education, empowerment (e.g., local control over tourism development), greater happiness, or decreased conflict.

One’s ability to function depends on various personal qualities and sociopolitical or environmental arrangements. The capability approach highlights the interplay between agency and structure by placing “explicit focus on personal and socio-environmental conversion factors of commodities into functionings, and on the whole social and institutional context that affects the conversion factors and also the capability set directly” (Robeyns, 2005, p. 99). The implication here is that, if certain factors either limit or enhance people’s capabilities or freedoms, then any adjustment to them necessarily influences people’s ability to function in meaningful ways and, by extension, their well-being (Figure 4.1). When adjustments to enhance individual or collective freedoms can be made but are not, poverty may become what Ballard (2012) calls “hegemonically redundant” (p. 564), where capability deprivation is cyclically reproduced over time. On the other hand, when such adjustments are made through changes in institutional configurations – and augmented by concomitant individual or collective action – poverty alleviation may be observed to the extent that people are more free to pursue the kind of life they have reason to value.

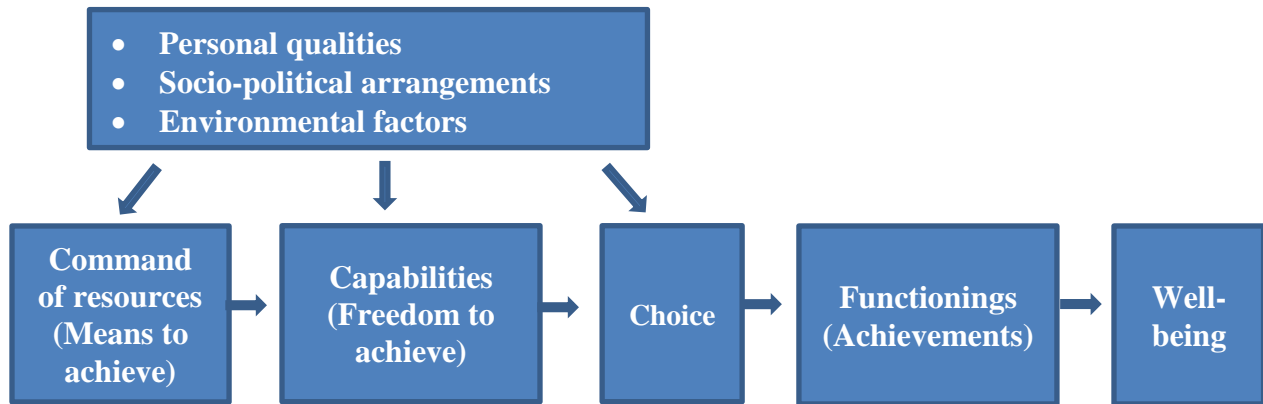


Figure 4.1.
The Capability Approach (adapted from Robeyns, 2005 and Croes, 2012)

While Sen (2002) acknowledges the “socially dependent” nature of individual capabilities (p. 85), others have criticized the capabilities approach for being overly focused on individual agency and freedom (Dean, 2009; Evans, 2002; Ibrahim, 2006; Pelenc, Lompo, Pallet, & Dubois, 2013). Ibrahim (2006) addresses this concern, explicitly distinguishing

...between individual capabilities, resulting from the individual’s freedom to choose the life he/she has reason to value, and collective capabilities generated through the individual’s engagement in a collective action. The expansion of collective capabilities not only requires the use of agency freedom (i.e., individuals pursuing goals other than their own), but also involves participation in a collectivity. (p. 404)

Participation in collectivities (e.g., indigenous tourism associations in the Valle Sagrado) may be especially important for poorer individuals who often appear to shift their preferences (i.e., interests) according to external influences and their struggle to survive (Sen, 2000).

However, to foment positive change and to minimize preference shaping among those most vulnerable, issues of power must be addressed. Evans (2002) suggests that the “promotion of a vibrant associational life...enables the less privileged to develop their own distinctive

preferences and priorities based on their shared economic positions and life circumstances, and to develop shared strategies for pursuing those preferences” (p. 59). Collective capabilities unlocked through the formation and evolution of tourism associations within broader socio-political contexts may thus lead to desirable functionings for the poor not feasible through individual action.

A surging emphasis on collective capabilities and associational life among rural, indigenous communities in the Valle Sagrado highlights the evolving (macro-)institutional context of tourism governance and state-wide focus on poverty alleviation in Peru. However, as several studies suggest, national emphasis on a more vibrant associational life has not translated into widespread, pro-poor gains for rural, indigenous communities like those of the Valle Sagrado (Escobal & Ponce, 2011; Munoz, Paredes, & Thorp, 2007). Munoz et al. (2007) point out that “a certain degree of coherence in the institutional framework” (p. 1930) is vital for unlocking capabilities and achieving successful collective action, especially among the relatively poor who assume greater costs when seeking to participate in fragile institutional systems. Similarly, Estache (2004) suggests that local-level institutional weakness must be addressed if the poor are to benefit from improved infrastructure and related development efforts. A better understanding of the myriad strategies considered and employed by local people to alter institutional configurations (both visible structures and less visible norms and “rules of the game”) may thus support efforts to evaluate poverty alleviation through enhanced individual and collective (i.e., associational) opportunities in the Valle Sagrado.

An array of macro-institutional factors and an extensive history of events have helped shape the intricate milieu in which some members of Valle Sagrado communities are currently pursuing opportunities by forming and being involved in tourism associations. In order to

evaluate this milieu, the current study's methods and context are now provided before presenting the cases of two tourism associations in which local strategies for institutional change (proposed or realized) may be seen to influence the achievement of enhanced individual or collective functioning.

Study Methods

This study employed a qualitative case-study approach to evaluate how evolving institutional characteristics, modified through the structurally inscribed strategies of reflexive actors, might contribute to poverty alleviation for tourism association members in two Valle Sagrado communities. According to Yin (2009), a case study is “an empirical enquiry about a contemporary phenomenon (e.g. a ‘case’), set within its real-world context” (p. 18). The enquiry here adopted a constructivist-interpretive paradigm to assess poverty alleviation as a characteristic of the cases presented. Such a paradigm requires neither the generalizability nor “the external verification of positivist approaches and does not seek to determine the ‘truth’ of any offered interpretation”, but instead appreciates the insights, challenges, and new questions that diverse interpretations may create (Higgins-Desbiolles, Trevorrow, & Sparrow, 2014, p. 49; Dredge & Jenkins, 2011; Stake, 1995).

Setting

Data were collected as part of a six-month study from June through December of 2013. The study was funded by Intrepid Travel, a Melbourne-based tour operator that provides small-group tours (less than 16 passengers) led by local guides in destinations on all seven continents. In Peru, nearly all Intrepid tours involve a visit to Machu Picchu. These tours begin in the

ancient Inca capital of Cuzco in the southcentral Andean highlands and include a brief visit to a Valle Sagrado community to eat a locally-prepared meal, to experience local ways (e.g., cutting barley, feeding cows, tilling soil, learning how to make corn beer, etc.), and to purchase locally-made textiles, crafts, or other products (e.g., chocolates, ceramics, flowers, etc.). At the time of the study, Intrepid had a working relationship with four tourism associations in four Valle Sagrado communities (one association in each community). Intrepid's satellite office in Cuzco manages tours in the region and maintains communication with association members in the four communities, providing them with occasional trainings (e.g., on cooking or service), monthly visitor schedules, and annual feedback from traveler surveys.

The tourism associations working with Intrepid in the communities of Chichubamba and Qorqor – each located about an hour from Cuzco by van – are the focus of this study. Multiple sources of data were collected to triangulate findings (Decrop, 1999), including semi-structured interviews ($N = 46$), participant observation and field notes, and tourism-related reports from local government, Intrepid's Cuzco office, and community tourism associations. Interview questions explored local views of tourism-based changes, local concerns or interests related to Intrepid-community interactions, and tourism association strategies for institutional change. These strategies focused on either intra-institutional (i.e., internal features of each tourism association) or inter-institutional (i.e., factors influencing interactions between Intrepid and each tourism association) characteristics and concerns. Individuals interviewed were from households receiving Intrepid visitors ($n = 23$), households not involved in tourism ($n = 12$), Intrepid staff ($n = 8$), and local government representatives ($n = 3$).

Essential to the analysis of data in this study was the incorporation of local views and strategies as drivers of the research (Nielson & Wilson, 2012; Whyte, 2010). Local views and

strategies were evaluated, compiled, and analyzed via a team-based methodology known as rapid qualitative inquiry (RQI), which involves a rapid appraisal of a situation based on insiders' perspectives (Beebe, 2014). Strategies for intra-institutional change (i.e., within each association) were primarily identified through the interviews and discussed during tourism association meetings in respective communities. Strategies for inter-institutional change (i.e., between associations and Intrepid) were also discussed during these meetings and shared with Intrepid staff during a tourism association workshop in November of 2013.

This workshop brought together five Intrepid staff from Lima and Cuzco along with three representatives from each of the four tourism associations partnering with Intrepid in the Valle Sagrado to share ideas, interests, and concerns related to tourism development in each community. It represented a conjunctural moment in which institutional concerns were presented and addressed, allowing for both horizontal and vertical knowledge integration to occur between respective association members and Intrepid staff, many of whom had never met. The ongoing implementation of specific strategies for institutional change has been pursued based on workshop outcomes and project findings compiled and summarized in reports for tourism associations and Intrepid.

Context

The interplay between tourism-led growth and institutional thickness in rural areas represents a significant aspect of Peru's approach to development since the early 90s (Escobal & Ponce, 2011). The promotion of tourism became visible as a national strategy for economic growth with the materialization of the Comisión de Promoción del Perú (PROMPERU) in 1993 (PROMPERU, 2006). Housed within the Ministerio de Comercio Exterior y Turismo

(MINCETUR), PROMPERU's primary responsibilities have involved the branding and marketing of Peruvian tourism both domestically and abroad.

In an effort to tackle inequalities and enhance collective capabilities among indigenous people, the Peruvian state has made a recent turn toward supporting the formation and capacitation of rural and community-based tourism associations. This turn was realized in 2007 with the passing of Ministerial Resolution 054-2007, creating a National Program for Rural and Community-based Tourism (PNTRC). The primary objective of the PNTRC has been “to contribute, in rural areas, to the development of sustainable tourism as a tool for socio-economic development in Peru” (MINCETUR, 2014). As part of this program, the MINCETUR offers an annual conference for Peruvians working in rural tourism. Conference dues and meal costs are covered for attendees by public funds (e.g., tourism revenues), and travel awards are issued in some cases by municipal or regional governments to encourage greater participation by tourism associations from more remote areas. In highly visited areas like the Valle Sagrado, the program also often provides government assistance and training (e.g., how to make traditional textile dyes) for rural tourism association members.

RESULTS

These state-level trends in tourism governance – themselves influenced by an even broader international institutional context and growing focus on tourism-based poverty alleviation – underpin the spatio-temporal and socio-political milieu in which tourism associations of Valle Sagrado communities are currently evolving. An exhaustive evaluation of the potential link between institutional change and poverty alleviation for association members in Chichubamba and Qorqor cannot be provided here. Instead, the analysis of each case will focus

on salient historical and conjunctural elements characterizing tourism associations in these communities, and related strategies for unlocking *institutional* opportunities through intra- and inter-institutional change.

Intra-Institutional Analysis: Chichubamba

In 2005, the non-governmental organization (NGO) Pro-Peru brought together approximately 80% of the 150 households in Chichubamba to consider ways they might earn money from work in tourism. Interest was strong at first, but that interest was short-lived. According to a current member of the community's only tourism association, the *Asociación de Agroturismo* (Agrotourism Association), it took three years before any visitors showed up, and most families decided that work in tourism was a waste of time. As of 2013, only fourteen individuals from nine different families remained.

Through the suggestion of a local Intrepid guide, Intrepid began bringing visitors to Chichubamba in 2008, representing the longest ongoing partnership of any of the four Valle Sagrado communities receiving Intrepid groups. The association receives three to five Intrepid groups per week, with groups being larger and more consistent during the drier months of winter and spring (May through November). Like the tourism association in Qorqor and others in Peru, the *Asociación de Agroturismo* has a hierarchical political structure similar to that of the Peruvian state, with a president, vice president, and several lesser posts comprising the association's *junta directiva* (board of directors). Chichubamba's only tourism association uses a rotational system in which associates take turns cooking lunch for Intrepid visitors in respective homes. Whichever associate cooks lunch keeps the money earned from the visit. After lunch, Intrepid groups have the option to attend workshops in various associates' homes to learn about

local livelihoods (e.g., floriculture, ceramics, chocolates, coffee, apiculture, *chicha* corn beer, or agriculture) and to purchase goods from the associate giving the workshop.

Through semi-structured interviews and association meetings, several intra-institutional characteristics were identified by Asociación de Agroturismo members as being problematic. Specific strategies aimed at addressing these concerns through institutional change were also proposed (Table 4.1). First, association members realized early on that a lack of awareness and experience stimulated destructive bickering and finger-pointing regarding association leadership decisions. This led to some reflexive maneuvering as association members decided to limit leadership posts in the junta directiva to two year terms, allowing other members to be voted in to increase their empathy toward leadership and experience its challenges more directly.

Second, a commonly expressed concern involved the unequal distribution of income among associates, stemming from the individualistic and competitive nature of the association. Each associate treated his/her workshop like an individual business, but there were ongoing discussions about creating a ‘common purse’ to be able to distribute tourism earnings and support associate needs more effectively. One associate, for example, suggested that “*we should create a common fund to which associates give a percentage of the money they earn from their workshops or lunches*” (CI-4). The unequal distribution of income even kept some non-associates from wanting to work in tourism. One community member expressed her concerns with the association, saying that “*some folks in the community who aren’t associates don’t want to get involved because they see how those in the association fight. It’d be better if the association was more organized and the benefits were distributed more equally*” (CN-4).

Third, association meetings were consistently attended by most of the 14 members, but not by all. Ongoing absences and lack of involvement led many to suggest that more serious

Table 4.1.

Strategies for unlocking opportunities through institutional change within tourism associations.

Association Community	Theme/concern	Institutional characteristic/configuration	Local strategy/idea for institutional change ¹
Chichubamba	<i>Association members disagree with leadership</i>	No rotation of leadership in place (e.g., for the association presidency)	New leadership is now voted in every two years to minimize griping and give all association members a chance to learn through leading*
	<i>Unequal distribution of income</i>	All income is accumulated on an individual basis for lunch and workshops	Create a common purse from lunch and workshop sales to distribute money more equally and to better meet association member needs
	<i>Inadequate sanctions</i>	There is currently no ‘discipline’ for association members who are late for meetings, have messy kitchens, etc.	Temporarily remove the offender from the visitor rotation, or exact a small fine
	<i>Unequal distribution of visitors</i>	Some association members receive more visitors than others for lunch or workshops.	Establish a minimum number of visitors that each associate should receive (e.g., 50) per year
Qorqor	<i>Association members disagree with leadership</i>	No voting mechanism or rotation of leadership is currently in place (e.g., for the association presidency)	Create rule to vote in new leaders (as opposed to breaking off to form a new tourism association)
	<i>Low income not worth time commitment</i>	Income from lunch sales distributed among high number of associates	Don’t require participation of each associate to help prepare for each Intrepid visit
	<i>Unequal exposure when selling textiles</i>	All association members align themselves in a long line on ground when selling, with those on the end getting less attention from visitors	Lay out textiles in semi-circular formation rather than line for more equal interaction, or have fewer associates selling based on visitor numbers
	<i>Lunch prices too low</i>	Charge regular price for a basic lunch with appetizer, soup, and entrée as associations do in many other communities	Innovate and prepare a bounteous Andean buffet, nearly doubling the lunch price charged to visitors*
	<i>Exclusivity</i>	Only the larger tourism association in Qorqor can use the community meeting space for tourism	Create a schedule allowing the other tourism association in Qorqor to use the community space for tourism, as well

1. Strategies with an asterisk represent conjunctural elements of institutional changes that have already been made.

sanctions would be necessary to encourage commitment. Strategies proposed included charging offenders a small fine, or removing them for a period of time from the Intrepid visitor rotation.

Lastly, an unequal distribution of visitors represented a major concern stemming from various factors. In the eyes of some associates, the most significant cause for this unequal distribution was that one of the associates had a significantly advanced tourism business before the association was ever formed. The business was a resort called *El Huerto Paraiso* with approximately 12 rooms, a lobby, a dining area, and an orchard – all located on the associate’s property in the middle of Chichubamba. Tensions were enhanced as the Huerto frequently sent its guests to attend workshops or to eat lunch with just three partner associates, excluding other associates. One associate reflected:

The Huerto is using the association; at the cost of the associates, it is growing! The Huerto shouldn't be allowed to remain in the Association unless it sends groups to every associate and pays a fair price. Egoism and hypocrisy exist in the Huerto. (CI-9)

Two strategies for addressing this concern were expressed. One was to require that the Huerto begin sending its guests to the homes of all socios with greater equality. The other was to create a minimum number of visitations or groups (e.g., 50) that each associate might expect to receive in a given year.

Intra-Institutional Analysis: Qorqor

Presenting a decidedly more rural experience than in Chichubamba, Qorqor began receiving Intrepid groups in early 2013. Qorqor is located just outside the town of Chinchero where construction of Cuzco’s new international airport – a five-year project valued at 6.5 million USD – was set to begin in 2014 (CAPA, 2014). Qorqor, with a population of about 200 residents, was the smallest of the four communities visited by Intrepid at the time of the study. However, its *Munay Ttica* (meaning Beautiful Flower in Quechua) association was the largest,

consisting of 24 members. It also received the highest accolades from Intrepid visitors. When filling out tour surveys at trip's end, visitors often mentioned Qorqor's warm reception – replete with dancing and the music of a *kena* (Quechua flute), played by one of the associate's grandfathers – as a highlight of their Machu Picchu excursion.

Before the association's official formation in early 2013, several of its leaders made the 55 minute trip to Cuzco and negotiated with 16 different travel companies in an effort to form partnerships and increase visitor potential. Intrepid Travel became just one of two companies agreeing to the proposed partnership. Prior to its partnership with Qorqor, Intrepid had been taking groups to nearby Umasbamba. One day, an Intrepid group found itself in the middle of a grisly squabble as Umasbamba's two tourism associations began throwing rocks at each other to stake their claim on the innocent and unsuspecting visitors. Intrepid quickly and understandably discontinued its interaction with Umasbamba, deciding instead to work with the Munay Ttica association in Qorqor. By April of 2013, a steady flow of Intrepid visitors (about three groups per week) were coming to Qorqor to eat a traditional meal, to participate in local ways (e.g., tilling the fields, harvesting barley, feeding the cows, etc.), and to learn about and possibly purchase hand-woven textiles from Munay Ttica members.

Although the Munay Ttica association was about eight years younger than the Asociación de Agroturismo of Chichubamba, its members identified several institutional constraints and intra-associational concerns they wished to address. Specific strategies were discussed during association meetings and in association and community member interviews (Table 4.1). First, as in Chichubamba, disagreements with association leadership (i.e., the junta directiva) had motivated several members to back out of the association to form another of their own (specific disagreements had arisen over how much to charge visitors and over some associates' ability to

speak both Quechua and Spanish with travel companies). Several current members were also considering backing out unless leaders could help make benefits from tourism justify the time commitment required in serving Intrepid visitors. Strategies for these concerns included creating a system for voting in new leadership (as done in Chichubamba) and a rotational mechanism by which association members might take turns serving Intrepid groups instead of requiring that all 24 members be present for each visit.

A third institutional concern related to the way associates lined up to sell their textiles to visitors. With around 20 associates usually present to sell their hand-made weaves – and with Intrepid groups being much smaller, with as few as three visitors on some occasions – associates at the end of the lineup often appeared to receive less attention than those in the middle or toward the entrance of the community space being used. As lineup location seemed to foment inequalities in textile sales, strategies included forming more of a semicircle as associates lay out their textiles for purchase, or simply reducing the number of associates selling to visitors.

Fourth, Intrepid had established a price of 15 *nuevos soles* (~5.50 USD) that each association should charge visitors for lunch, but this price seemed too low. Having yet to receive any culinary training from Intrepid staff (itself a concern for the association), Munay Ttica decided to begin preparing a sumptuous Andean buffet for its guests, charging 25 soles (~9 USD) per person for lunch. The considerably higher lunch price did not lessen people's praise for the innovation and conviviality of Munay Ttica members. One Intrepid staff member went so far as to dub Qorqor "*the golden child of the four communities*" visited by Intrepid groups (IS-7).

Finally, the sheer size of Munay Ttica (well over half of the households in Qorqor were directly linked to the association) gave it notable sway over community-wide decisions. After several disgruntled families withdrew membership to form a second tourism association of their

own, Munay Ttica leaders decided to retain exclusive control of Qorqor's communal space, constructed with the support of municipal government representatives based in nearby Chinchero. The second, smaller tourism association in Qorqor was kept from conducting any tourism activity in the communal space. Understandably, members of that association and even several Munay Ttica members were considering how to encourage a fairer use of the facilities. The president of the second association reflected:

Let my association use the communal space, too, when my visitors arrive! Now, the [Munay Ttica] women don't let us enter. There has always been distrust here, since long ago. Now, with tourism, the conflict hasn't decreased or increased. It's the same. That distrust will always be here – due to a lack of education more than anything, I think. Basically, even though we're from the same community, we aren't equal. Some have animals, some don't. That creates the distrust. Some have larger fields, and others have smaller ones. That creates jealousy. Another thing is that government representatives bring support for those in need, but the leaders of the community take advantage of the support and it never reaches those who are really in need. Those who already have are the ones harvesting the support. (QT-1)

Beyond highlighting the pervasive issue of local elitism (Mowforth & Munt, 2009), this quote alludes to the structurally inscribed actions of both tourism association members and municipal government representatives who have failed to address pre-existing and ongoing inequalities in Qorqor. One strategy proposed for addressing these concerns involved the creation of a schedule to allow for more equal use of the government-constructed communal space by both tourism associations.

Inter-Institutional Analysis: Associations and Intrepid

The workshop on November 30, 2013 represented a conjunctural moment in which inter-institutional concerns were voiced and adjusted based on collective (i.e., associational) and Intrepid strategies for institutional change (Table 4.2). Many of the concerns presented were shared by more than one tourism association. The institutional context characterizing Intrepid's interactions with each association ostensibly influenced the strategic selection of certain strategies over others. This selection process became materialized in the act of an Intrepid staff member writing down agreed-upon changes on a white board in front of those in attendance.

From the Asociación de Agroturismo of Chichubamba, voiced concerns included the lack of compensation for workshops, lunch prices not covering rising food costs, guides taking their groups to favorite associates' homes for lunch or workshops, and late confirmation of scheduled Intrepid visits. For Munay Ttica members of Qorqor, a unique concern was that Intrepid groups were visiting artisanal markets to purchase textiles before visiting their community. For both associations, concerns included uncertainty about when association leaders should travel to Cuzco to pick up monthly visitation schedules, prepared lunches not being paid for (e.g., if a visitor was sick and couldn't eat, or if a visitor ate something en route to the community and was no longer hungry), cancelled visits, uncertainty about group arrival times, and not having the contact information for the guides.

Specific strategies were proposed to address these concerns. It was decided that resulting institutional changes would take immediate effect in (re)structuring each Intrepid-association partnership. While Intrepid visitors would not be required to pay for workshops or other activities, the minimum lunch price would be raised to 20 nuevos soles (~7.30 USD). Scheduled visits, and the number of lunches to be prepared and purchased, were to be confirmed three days

Table 4.2.

Strategies for unlocking opportunities through institutional change between associations and Intrepid.

Association Community	Theme/concern	Institutional characteristic/configuration	Strategy/idea for institutional change
Chichubamba	<i>Workshop income insufficient¹</i>	Intrepid visitors have to pay for lunch, but craft purchases from workshops are optional	Require that Intrepid visitors pay for workshops and not just for purchases
Chichubamba	<i>Lunch prices too low</i>	The set price of 15 soles per visitor for lunch does not cover rising food costs (e.g., for Quinoa)	Intrepid visitors should pay 20 soles (7.30 USD) per lunch instead of 15 soles (5.50 USD)
Chichubamba	<i>Guides ignoring association norms</i>	Intrepid guides often demand that their group eats lunch or does an activity/workshop in a ‘favorite’ associate’s home in Chichubamba	Intrepid guides should bring groups to eat lunch or attend a workshop in the home of the scheduled associate rather than with ‘favorites’ or in more accessible homes
Chichubamba	<i>Insufficient time to prepare lunch for visitors</i>	Intrepid guides confirm their visits just one day prior to coming, leaving associations little time to purchase ingredients and prepare food	Guides should be required to contact associations in communities three days prior to visit
Qorqor	<i>Guides disloyal to community partnership</i>	Intrepid passengers are brought to other craft markets before having a chance to buy from tourism associations	Intrepid guides should not stop at other artisanal markets with their groups en route to communities
Both	<i>Unclear on when to communicate with Intrepid</i>	Associations often make several visits to the Intrepid office in Cuzco to pick up the monthly program of scheduled visits	Schedules should be ready for pick-up by tourism associations on the 29 th of each month (earlier in February)
Both	<i>Losing time and money on food preparation</i>	The number of Intrepid visitors paying for lunch upon arrival is less than number originally communicated to the association	Guides should inform the association of the number of lunches that will be purchased, and associations would receive this amount, even if the number of lunches actually eaten changes
Both	<i>Demotivation from cancelled visits</i>	As much as 50% of visits to communities are being cancelled by Intrepid guides (one sick passenger often means the entire group doesn’t get to visit a community)	Guides should be required to bring groups to communities as paid portions of passenger itineraries (except for in extreme cases of a strike, severe weather, etc.). Sick passengers can meet up with group later
Both	<i>Uncertainty about arrival times</i>	Arrival times for Intrepid groups aren’t consistent	When an Intrepid group is scheduled, arrival time should be between 11 and 11:30am
Both	<i>Inability to call guides</i>	Contact info for Intrepid guides is not always listed in the schedule given to associations each month	Intrepid could provide associations with the contact info (telephone numbers) of all Intrepid guides

1. This was the only concern of those listed here that wasn’t communicated with Intrepid staff during the four-community workshop held on November 30, 2013. All other concerns were expressed, with Intrepid staff and association members present agreeing to implement the institutional changes proposed.

prior to arrival. Visits were not to be cancelled for any reason, except for under severe circumstances such as extreme weather or a strike, with group arrivals in each community set to occur between 11 and 11:30 a.m. Intrepid guides would no longer be allowed to stop in artisanal markets with their passengers before visiting communities, and guides would be expected to follow association norms (e.g., following lunch or workshop/activity schedules created by each association). Lastly, Intrepid staff in Cuzco would provide associations with guide contact information when association members arrived to pick up visitation schedules on the 29th of each month (or earlier in February).

DISCUSSION

The findings presented in this article focus on two tourism associations of the Valle Sagrado and describe the strategic calculation of reflexive actors seeking to reconfigure both intra- and inter-institutional characteristics and arrangements. In order to apply Sen's capability approach to evaluate whether such maneuvering has led to unlocked opportunities for the poor, two considerations must be discussed.

First, it is important to clarify what is meant by 'poor'. In this article, no quantifiable level of deprivation is given, and no minimum degree of individual or collective functioning is provided, to determine who is poor and who is not. Here, 'the poor' does not necessarily refer to people experiencing deprivation of income or so-called basic capabilities (e.g., the inability to be physically healthy due to a lack of access to food or other factors), although Peru's rural highlands may be characterized by such forms of poverty (see Escobal & Prince, 2011; USAID, 2012). Instead, the poor in this article appear as people who experience a relative and site-specific condition of locally defined *institutional deprivation* in which individual or collective

functioning appears weakened or inhibited by identifiable structural limitations. Said in another way, if specific institutional concerns expressed by tourism association members restrict individual and collective ability to function in desirable ways, then people experiencing those restrictions may be considered (institutionally) poor, and any process of calculating and enacting strategies to relieve those restraints and unlock opportunities may be considered a form of (institutional) poverty alleviation.

Second, it is necessary to consider whether the strategies for institutional change presented here have any potential to improve lives or to enhance what people can and can't do (Kakwani and Pernia, 2000). If improved functioning can be used as the evaluative focus in measuring poverty alleviation (Sen, 2000, p. 75), then identifying specific strategies meant to improve the functioning of tourism associations and their members – based on the expressed interests and concerns of local people – could represent a reasonable proxy for measuring improved functionings directly.

In view of these two considerations, the findings in this article allude to a form of poverty alleviation through institutional changes (proposed and realized) stemming from the structurally inscribed strategic calculation of tourism association members and their concomitant interactions with Intrepid. Strategies addressing intra-institutional concerns in both Chichubamba and Qorqor (see Table 4.1) have the potential to contribute to improved individual and collective functioning in several ways. These include increased associational coherence and respect for leadership, greater equality in the distribution of income and visitors, more community-wide opportunities to participate in tourism (e.g., through use of the communal space in Qorqor), 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.

In a similar fashion, strategies addressing inter-institutional concerns influencing association-Intrepid interactions (see Table 4.2) also have the potential to contribute to improved individual and collective functioning. Such improvements might include more effective communication with Intrepid staff (both guides and administrators), reduced disenchantment stemming from wasted trips to Cuzco or cancelled visitations, increased satisfaction from more consistent arrival times and more accurate lunch counts, more compensation in offering workshops or other activities for visitors, and stronger respect for and adherence to associational norms by Intrepid.

These examples of improved individual and collective functioning qualitatively describe possible outcomes of expressed strategies, representing a form of relative poverty alleviation directly linked to dynamic processes of actor-driven, institutional change. However, this linkage is problematic and characterized by several concerns. First, while tourism association members in this study ostensibly identified strategies that possessed the greatest potential for improved functioning, each reflexive actor was operating under conditions of limited awareness and experience. As such, neither association members nor Intrepid staff could perfectly predict the extent to which *future* constraints or limitations might be incurred based on a current course of action pursued. Jessop (1996) writes:

It is impossible to conceptualize structural constraints outside specific time horizons and spatial scales of action because any constraint could be rendered inoperable through competent actors' choice of longer-term and/or spatially more appropriate strategies.” (p. 127)

Measuring the potential link between a specific strategy and enhanced individual or collective

functioning may thus require a longer-term evaluation of the effects of institutional change than that provided by the snapshot approach presented here.

Second, it is important to note that the process of selecting specific strategies to address identified institutional concerns was not characterized by a complete consensus among association members and Intrepid staff. One Intrepid guide, for example, did not want to bring her groups to more remote homes in Chichubamba. She expressed her reason for not wanting to attend to the association's norms or scheduled rotation:

The most important element during my travelers' trip is their time. If I have to take them further back into Chichubamba to attend distant workshops or have lunch, or if I have to take the time to get to know a socio upon arrival, it may affect the fluidity of our trip, cause us to lose time, and thus impact visitors' experiences negatively. (IS-3)

Although general agreement existed among association members and Intrepid staff, a lack of complete consensus suggests that while institutional change may lead to enhanced functioning for many, no sweeping statements can be made about it doing so for all.

Third, it is impossible to consider and describe the range of factors influencing the evolution of the tourism associations in this study. Jessop (2001) suggests that institutions “should be analyzed as complex emergent phenomena, whose reproduction is incomplete, provisional, and unstable, and which coevolve with a range of other complex emergent phenomena...In particular, they have histories” (p. 1230). The calculation and selection of a particular strategy may unlock opportunities and lead to enhanced functioning for a time, but its desired effect may be neutralized or overturned down the road. In view of the evolving and path-dependent nature of institutions, then, any allusion to poverty alleviation through institutional change must itself be considered emergent, incomplete, unstable.

A final concern relates to the use of strategies for institutional change as a proxy for improved functioning. Sen's capability approach evaluates poverty alleviation in terms of freedom enhancement, where improved functioning often represents the evaluative focus. In this study, poverty alleviation was not based on local reports of improved functioning, but rather on the *potential* for specific strategies to improve functioning for local people. Future studies may thus take local reports of the desired and/or experienced effects of these strategies into greater consideration.

CONCLUSION

Many tourism studies concerned with the tourism-poverty debate have perhaps over-emphasized the sway of structural elements in their analyses while minimizing the individual or collective agency of reflexive actors (Erskine & Meyer, 2012). Overemphasizing structure in this fashion while seeking to evaluate socially constructed concepts such as poverty may generate decidedly one-sided and deterministic views, contributing to 'master categorizations' or the reification of complex processes influencing the formation and reformation of institutions and their ostensible effects on the lives of the poor (Bourdieu, 1994; Sassen, 2008).

In an attempt to mitigate such tendencies, this article has qualitatively incorporated local concerns and related strategies for institutional change as the foundation for the analysis presented. Findings were based on a relative view of poverty which moves beyond the mere means to achieve (e.g., income) to include non-monetary deprivations such as social exclusion, lack of voice, disrespect, powerlessness, or the inability to fulfill one's potential (Holden, 2013; Lister, 2004; MacPherson & Silburn, 1998; Townsend, 1979). Particular attention was drawn to institutional deprivation as a potential cause *and* condition of poverty, characterized by locally-

defined institutional limitations and restricted individual or collective functioning. Poverty alleviation was noted to the extent that specific strategies could potentially reverse these restrictions and improve functioning for tourism associations and their members.

Of practical significance here is Jessop's (2001) suggestion that "institutions have both microfoundations and macrocontexts" (p. 1231). Conjunctural moments appear to depend on both the ability for individual actors to reflexively consider and elect a particular course of action, as well as on broader socio-political factors that may restrict or unlock the freedom to pursue institutional change in the first place.

In the context of rural, community-based tourism development involving indigenous people, these external influences may present themselves in the form of specific policies that place the rights, interests, and concerns of local people at the forefront rather than background of tourism operations. Intrepid's willingness to hold a tourism association workshop on November 30, for example, allowed for some (not all) institutional concerns to make a significant shift into the realm of opportunity, when they might have otherwise remained only long-term constraints. As such, this study supports the view that poverty alleviation through institutional change may be both an *opportunity-generating* and *opportunity-dependent* process, contingent upon on micro- and macro-level factors entwined across unstable, spatio-temporal domains.

PPT studies may benefit from incorporating such micro- and macro-level considerations into analyses of institutional dynamics and tourism-based poverty alleviation. This article sought to do this by briefly discussing the influence of the state on tourism association formation in Peru, and by emphasizing micro-level strategies of reflexive actors seeking, in short, to improve their lives. The cases presented of two tourism associations receiving Intrepid groups in the Valle Sagrado suggest that processes of poverty alleviation through institutional change both depend

on and unlock opportunities for local people. Better understanding these processes may encourage more effective strategies pursued by governments, development agencies, the private sector, or indigenous communities as their respective members seek to enhance individual and collective functioning through tourism.

CHAPTER V
DEVELOPMENT DISCOURSES AND LOCAL PERCEPTIONS OF POVERTY AND
TOURISM PRACTICE IN CUZCO, PERU

OVERVIEW

This article explores agreements and incongruities between development discourses and local perceptions of poverty and tourism practice in rural communities outside the ancient Inca capital of Cuzco, Peru. Copestake's four global designs of development (income first, needs first, rights first, and local first) provide the framework for this evaluation, incorporating local accounts and on-the-ground observations from a six-month ethnographic study carried out in the region from June through December, 2013. Findings suggest that a strong degree of overlap exists between local perceptions and income first, needs first, and rights first discourses of development. However, frustrations with contentious politics and tourism reveal an underlying resistance to neoliberal economism and to the increased foreign presence outside the city of Cuzco. These findings suggest that local interests and views must be incorporated more effectively into analyses of development discourses and tourism practice, promoting a more localist stance toward policy creation by understanding not only potential causes of underlying frustrations, but also how issues of power may keep such frustrations from being voiced by local people in the first place.

INTRODUCTION

In the last two decades of the 20th century, much of Latin America evinced global trends by assuming a *Zeitgeist* of economic neoliberalism¹ and income-based development (Copestake, 2011). During this time, many governments in South America appeared to align their national growth strategies with “neoliberal development rhetoric” through specific emphasis on trade liberalization, deregulation, privatization, and tax reform (Steel, 2013, p. 238; Aguilar-Ibarra, Reid, & Thorpe, 2000).

Under President Fujimori in the early 90s, the nation of Peru began making a similar shift toward the adoption of neoliberal policies, which continue driving development in the region (Vincent, 2014; Laing, 2012). Peru’s efforts to boost foreign investment in export industries such as oil and tourism helped to galvanize a 207% increase in the nation’s GDP between 1990 and 2013, alluding to ‘trickle down poverty alleviation’ through rising national incomes and small business growth (WTTC, 2013; USAID, 2013).

As Peru’s third largest export industry (after oil and mining), tourism in particular has been recognized for its poverty alleviating potential as a major contributor to economic growth (MINCETUR, 2007). However, in contrast to such positivistic claims, some studies suggest that excessive leakages and increased encroachment of *empresas extranjeras* (foreign companies) on indigenous lands have fomented growing socio-economic disparities while reinforcing neoliberal agendas and disregarding local views of poverty and well-being (Bebbington, 2011; Copestake, Guillen-Royo, Chou, Hinks, & Velasco, 2009; Escobar, 1995; Mowforth & Munt, 2009; Herrera, Razafindrakoto, & Roubaud, 2006; Vincent, 2014).

The apparent focus by the Peruvian state on income-based discourses of development may be characterized by such disregard for local views and interests, supporting a sense among

citizens that Peru's government can seem both *lejano y ajeno* - far away and alien (Ansion & Tubino, 2004; Copestake, 2011). For the highly visited region of Cuzco – a modern-day tourism Mecca located in Peru's south-central highlands – such issues of knowledge-complementarity appear especially significant. Postigo (2014) suggests that, in rural Andean communities, “the local landscape can become a space for contestation between traditional-local and scientific non-local knowledge” (p. 385). As such, references to rising incomes have accentuated sweeping statements of tourism's poverty alleviating potential while failing to account for local views and tourism-linked inequalities. Herrera (2013) writes:

In the Cuzco region, key magnet for international tourism, the contradiction between development discourse and tourism practice has become manifest. It has seen its GDP rise at about 10% per annum over the last decade while, at the same time, it has maintained one of the lowest human development index values in the country. (p. 286)

In view of these trends, the purpose of this paper is to evaluate ways in which development discourses in Peru may be linked to “the grounded and placed realities” (Lang, 2012, p. 1051) of tourism practice in rural areas outside of Cuzco. Arguments presented are based on six months of ethnographic fieldwork carried out in the region in 2013. The main objectives of the fieldwork were to evaluate local perceptions of tourism and poverty as well as concerns and interests related to interactions between Intrepid Travel (an international tour operator based in Melbourne) and tourism association members in four communities of the *Valle Sagrado* (Sacred Valley). These communities were *Chichubamba*, *Amaru*, *Sacaca*, and *Qorqor*, each located about one hour by car from the city of Cuzco. Sources of data included semi-structured interviews of people working in tourism ($n = 47$), those not involved in tourism ($n = 29$), Intrepid guides ($n = 12$), and government representatives ($n = 5$). Interviews were

triangulated with additional data sources, including field notes, participant observation, and secondary documents such as tourism association and government reports (Decrop, 1999).

The structure of the paper is as follows. The next section provides an overview of global development, including a history of approaches to development, a brief critique of development paradigms, and four ‘global designs’ characterizing development discourses in Peru (Copestake, 2011). The subsequent section links Copestake’s development discourse typology to empirical observations in Cuzco, emphasizing agreements and incongruities between income first, needs first, and rights first discourses and local perceptions of poverty and tourism practice. The final section considers the theoretical and practical significance of analyzing discourses of ‘development-through-tourism’ in Peru, providing new insights into tourism’s alleged potential to alleviate poverty in the Cuzco region.

OVERVIEW OF DEVELOPMENT

Explicit and increased attention on development in the post-World War II era can be traced to historical processes related to attempts at measuring and eradicating poverty. A study conducted by Rowntree of York, published in 1901, was one of the first to create a standard for measuring poverty for individual families (Maxwell, 1999). Foucault (1978) alludes to national-level measures of poverty by highlighting governments’ interests in characterizing and categorizing people in terms of demographics, consumption, and health to drive state agendas for economic growth, welfare legislation, and other matters of ‘national’ importance. Over time, nation-states have used population characteristics such as these to establish “a form of surveillance and control as attentive as that of the head of a family over his household and his goods” (Foucault, 1978, p. 92).

After World War II, supranational organizations like the World Bank, the International Monetary Fund (IMF), and the World Trade Organization have been influential in producing and overseeing measures of poverty at the international level. Predominant post-war approaches treated development as a linear process and inevitable outcome of economic growth (Cremin & Nakabugo, 2012). Such views culminated with the rise of neoliberalism in the 80s, initially embodied by the Washington Consensus and subsequently criticized as “a transnational political project aiming to remake the nexus of market, state, and citizenship from above” (Wacquant, 2010, p. 213). The ensuing influence of neoliberalism on development was exemplified by the use of Structural Adjustment Programs (SAPs) by which ‘underdeveloped’ nations agreed to stabilize their economies to receive ongoing financial support from the World Bank and IMF and to attract foreign inward investment (Holden, 2013).

Around the same time, alternative approaches to development began to emerge that emphasized participatory methodologies and greater local-level ownership over development processes. Rapid Rural Appraisal (RRA), for example, was an approach implemented in the late 70s as a way for urban-based politicians to quickly evaluate rural tourism development based on community perceptions (de Negri, Thomas, Ilinigumugabo, Muvandi, & Lewis, 1998). This primarily information-extractive process gave way to Participatory Rural Appraisal (PRA) in the early 80s as non-governmental organizations (NGOs) began to appreciate “local people’s *capabilities* to plan and implement their own projects” (de Negri et al., 1998, p. 13; Chambers, 1992). Over time, elements of PRA have influenced a variety of development and research methodologies, including community driven development (Casey, Glennerster, & Miguel, 2011; Scarlato, 2013), asset-based approaches (Kretzmann & McKnight, 1993), community-led

visioning processes (Bopp & Bopp, 2006), and local ownership over team-based data collection and analysis (Beebe, 2014).

By the late 90s, broad emphasis on greater local control within alternative and sustainable development paradigms seemed to sway policies espoused by supranational institutions such as the United Nations (UN) and IMF (Pelenc, Lompo, Ballet, & Dubois, 2013; WCED, 1987). As SAPs appeared to enhance rather than alleviate poverty, they were replaced in the late 90s by Poverty Reduction Strategy Papers (PRSPs) (Willis, 2005). With the implementation of the Millennium Development Goals (MDGs) by the UN in 2000, a 'New Poverty Agenda' emerged that placed poor people at the center of development and devolved development strategizing to national-level institutions (IMF, 2014).

With the rising focus on global poverty, several organizations began drawing increased attention to tourism as a development tool: the 'Sustainable Tourism-Eliminating Poverty Program' (ST-EP) of the United Nations World Tourism Organization (UNWTO); 'Pro-Poor Tourism' (PPT) policies of the United Kingdom's Department for International Development; and the efforts of the Netherlands Agency for International Development (SNV) (Holden, 2013). Aligning with global trends since the turn of the millennium, then, tourism has become increasingly incorporated into national strategies for development and poverty reduction.

An important component of this 'New Poverty Agenda' has been the use of the Human Development Index (HDI) to conduct more robust analyses of global poverty in terms of health, education, income, gender issues, and living standards. Coupled with other indices like the Multidimensional Poverty Index (MPI) and the Gender Inequality Index (GII), the HDI has been used by the United Nations Development Program (UNDP) since 1990, with 187 countries being assessed in 2014 (UNGA, 2000; World Bank, 2005; UNDP, 2014). This approach represents a

break from traditional measures of national progress such as GDP, highlighting the increased contextualization of development within multidimensional and subjective characteristics of poverty. As the United Nations (UN) plans to usher in its Sustainable Development Goals in 2015, Costanza et. al (2014) suggest that measures of development should move beyond measures of poverty to consider “how ecology, economics, psychology and sociology collectively contribute to establishing and measuring *sustainable well-being*” (p. 285; italics added). Here, emphasis would be placed not only on universal human rights and views of poverty and well-being that may be generalizable on an international scale, but also on culturally relevant and context-specific views emphasizing local control and participation in development.

While PRSPs and the ‘New Poverty Agenda’ have called for greater local ownership over and involvement in decision-making processes related to poverty reduction (e.g., through more broad participation from civil society), approaches to development espoused by the so-called ‘Post-Washington Consensus’ have been criticized for being mere extensions of neoliberal ideology rather than alternatives to it (Scheyvens, 2007; Mowforth & Munt, 2009; Power, 2004). Craig and Porter (2002), for example, suggest that the PSRPs themselves are “a professedly comprehensive, ‘country-driven’ approach to poverty, combining powerful econometric and ethnographic method with a battery of participatory techniques and a sharp neoliberal economism” (p. 53). These critiques have, in many ways, sought to uncover issues of power by analyzing ways in which discourses of development have been propagated and employed from global- to local-levels. An overview of these analyses is now provided, with particular emphasis placed on discourses influencing development practice in Peru.

Discourses of Development

Discourses have been described as processes influencing the construction of meaning that people share about issues or things in the world (Wanner, 2015). Dryzek (2005) suggests that discourses “construct meanings and relationships, helping to define common sense and legitimate knowledge...Discourses are bound up with political power” (p. 9). Both internationally and in Peru, development discourses may consist of a combination of other socially constructed concepts, including discourses on ‘poverty’ or ‘sustainability’, collectively employed to legitimize and reinforce political actions or institutions.

Alluding to the ostensible influence of neoliberalism on ‘underdeveloped’ countries, many critiques have highlighted ‘Development’ as a Foucauldian discourse “by which the industrialized ‘West’ has continued to exercise control over processes of global change in a postcolonial world” (Yarrow & Venkatesan 2012, p. 3). Critiques of development or post-development paradigms have thus appeared particularly concerned with “all that Development conceals – especially strategies of power” (Mosse, 2013, p. 229) – and ways in which development discourses may influence what comes to be considered common sense or natural behavior (Curtis & Spencer, 2012).

Comparing development discourses to local views of poverty and tourism can draw attention to such strategies of power. Western representations of poverty as a kind of ‘pauperism’ – consisting of the dissolution of communal solidarity, limited income-earning potential, and beggarly aspirations to live like the wealthy – appear to be “external impositions with limited local relevance, illegitimately foisted on communities in the global South” (Shaffer, 2012, p. 1769). In the case of Peru, this leads to questions about how national-level paradigms and

approaches to development may complement or contradict ways in which indigenous people seek to improve their lives through involvement in tourism.

Studies on Peru have explored the juxtaposition of such discourses of development against the interests and views of indigenous people (Degregori, 2000; Copestake, 2008, 2011). Based on a review of national policy literature related to poverty, well-being, and inequality (Altamirano, Copestake, Figueuroa, & Wright-Revollo, 2004), Copestake (2008) suggests that development discourses in Peru might be placed into three categories: *income first*, *needs first*, and *rights first*. More recently, these approaches have been re-presented as mental models or global designs of development (Copestake, 2011), with a *local first* category being added to the original three.

According to Copestake, the income first discourse alludes to the adoption of predominantly neoliberal policies by the Peruvian government since the early 90s, initiated under Fujimori's presidency and emphasizing market-led growth primarily through (capitalistic) private enterprise. The needs first discourse was influenced by the United Nations Development Program (UNDP) and includes attempts by the Peruvian state to alleviate poverty by addressing specific deprivations in areas such as schooling, health, welfare, and sanitation. It represents a kind of managed capitalism, where the state or other organizations must intervene to address needs either stemming from or ignored by the market. A rights first discourse has characterized development practices by civil society, some non-governmental organizations (NGOs), and the health sector, arising in response to issues of racialized inequality and clientelism that have contributed to the marginalization of certain populations in Peru (such as people illiterate in Spanish, who were not allowed to vote until 1979; Herrera, 2013). This approach represents a kind of society-led development based on popular struggles for justice and equal opportunities.

Differing noticeably from the other three, the local first discourse opposes development practice that “constantly reaffirms the West’s view of itself as the center of legitimate knowledge, the arbiter of what counts as knowledge and the source of ‘civilized’ knowledge” (Smith, 1999, p. 63). Copestake (2011) suggests that the local first approach has close ties to the idea of *lo Andino*, which “refers to a social and cultural identity rooted in the uniqueness of the Andean environment and history that limits the possibility of fully translating into any other language indigenous concepts, such as *sumaq kasway*” (p. 98). While the local first model may itself be considered a global design, it emphasizes community-led approaches to development by focusing on solidarity, self-determination, and local views and interests.

COMPARING DEVELOPMENT DISCOURSES AND LOCAL ACCOUNTS

These four discourses of development represent a potential framework for comparing development discourses with local perceptions of poverty and tourism practice in rural communities outside of Cuzco. In the next few sections, each of the first three development discourses will be viewed through the lens of the fourth (i.e., the local first model of development) and specifically linked to on-the-ground observations and local accounts (Table 5.1). Ways in which local perceptions of poverty and tourism practice appear to align with or veer from each discourse will be considered to evaluate tourism’s poverty alleviating potential in the region.

Income First Development

An emphasis on rising revenues from tourism pervades Peruvian development discourse (cf. Chiesa, Crotti, & Lengefeld, 2013; Gestión, 2014; The Lima Guide, 2014). Working

Table 5.1.

Agreements and incongruities between development discourses¹ and local accounts of poverty and tourism outside Cuzco.

	Discourse		
	<i>Income First</i>	<i>Needs First</i>	<i>Rights First</i>
View of capitalism	Innocent/Instrumental	Inadequate	Imbalanced
Approach to development	Market-led (e.g., emphasis on economic growth)	State-led (e.g., increasing access to health services or education)	Society-led (e.g., struggle for equal recognition and opportunity)
Examples	<ul style="list-style-type: none"> • Commodification of local culture (e.g., <i>Programa Nacional de Turismo Rural/Comunitario</i>) • Leakage effects (e.g., privatization of the Machupicchu railway; Ruiz-Rubio, 2009) • Neoliberal policies leading to expansion of extractive industries – oil, mining, tourism (Steel, 2013) 	<ul style="list-style-type: none"> • Financial decentralization coupled with participatory budgeting (Vincent, 2014) • Infrastructure development (Escobal & Ponce, 2011) • Projects in Pisac (e.g., building bathrooms for every family in nearby rural communities) 	<ul style="list-style-type: none"> • Social movements (e.g., resisting dynamics of capital accumulation, the distribution of services by the state, or the loss of recognition or identity; Bebbington, 2010) • 2008 protests in Cuzco against Law 29164; discontent with increased foreign presence
Example of agreement between discourse and local account	<i>My older sister and I used to walk five hours to Cuzco with 14 llamas to sell the dung in the marketplace... Upon arrival at the ruins of Saqsaywaman with the llamas, there would be tourists. They would stop us on the path and take photos of us with our animals. They didn't let us pass, but they gave us tips, and we used that money to buy more bread. We felt happier when they took photos of us, because they gave us a tip and we went on our way with more money. (QN-1)</i>	<i>Our children no longer work in the fields and we are losing our customs. Very few dedicate themselves to our customs. Yes, our kids do respect how the community is organized, but the majority of adults want their kids to be educated rather than to continue living according to tradition. (AI-4)</i>	<i>What's sad is that only 3 or 4 out of ten young people in Cuzco speak Quechua. Very few speak it or practice it. I'm not ashamed of dressing up in traditional clothing. Globalization shouldn't result in the loss of the customs and traditions of the Andean people, and young people should never forget their origins nor ever forget their cultural identity. (SI-5)</i>
Example of incongruity between discourse and local account	<i>The majority of the people don't benefit from tourism. There are many poorer people here who have needs that could be met with tourism money, but only 30% of the population here is benefitting – and they're the ones who already have money.(AN-6)</i>	<i>I'm going to fight. I will struggle rather than receive support from the government, because that support changes our customs. And when the municipal government offers us support, only a small percentage reaches those who really have needs in our community. 40% of the support goes to the technicians or project administrators, and 50% goes to the mayor of Chinchero and his team. (QT-1)</i>	<i>Some people in Qorqor are poorer than others. They don't have a field nor enough money to support their family or educate their kids. But everyone here has a home, and so we live happily and peacefully. Here, there aren't any thieves, and we receive tourists very well. (QI-8)</i>

1. Adapted from Copestake (2008, 2011).

predominantly with indigenous communities since 2007, Peru's *Programa Nacional de Turismo Rural-Comunitario* (PNTRC), for example, specifically seeks to promote, "in rural areas, sustainable tourism development as a tool for socio-economic development in Peru" (MINCETUR, 2014). According to the Ministry of Foreign Commerce and Tourism (MINCETUR), families that participate in rural/community-based tourism associations – like those operating in the communities described here – generate an average complementary income of 53 soles (~USD \$17) per month. Additionally, between 2007 and 2013, rural economies in Peru saw over 7 million soles (~USD \$2.3 million) pour in as a result of tourism employment and partnerships with community-based tourism operators like Intrepid Travel.

In villages outside Cuzco, rural/community-based tourism has generated similar economic growth and opportunities for employment, predominantly for women. However, the leakage of tourism revenues from the region is significant. Ruiz-Rubio (2009) shows that, for a 3-day, 2-night stay in and around Cuzco, tourists spend an average of USD \$480. 70% of these tourism dollars are spent on a combination of flights (nearly monopolized by LAN-Chile) and the Cuzco-Machupicchu train ride (dominated by Peru Rail, a subsidiary of Britain's Orient Express, which was offered a 30-year concession after Fujimori's government decided to privatize the railway in 1999). Remaining tourism expenditures cover lodging and food (also significant sources of leakage), entrance fees (museums, churches, cultural attractions), and, in negligible amounts, payments reaching rural communities through craft and textile sales, local guides, traditional markets, and the like.

These numbers suggest that 'trickle-down' revenues provide some economic benefits for people living in these communities. But to what extent do local people link poverty and well-being to economic factors? Do local perceptions suggest that tourism-generated income can help

people escape poverty and improve their lives? While many people interviewed in this study 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.

Aligning with findings from other studies (cf. Zoomers, 2008), 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. For example, a woman from the tourism association in Qorqor recognized, *“Because we are able to work in our fields, we are rich”* (QT-1). Another man stated, *“In the country, we have plenty of land, but in the city – poverty could exist there. I would consider myself poor if I were an invalid – without hands or feet to be able to work”* (QI-2). A link between poverty and alcoholism was evident, as well. One man said, *“Poverty would be like having a vice, such as drinking all the time. A man who doesn’t take care of his family loses his worth; he wants to end his life by drinking”* (SN-7).

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. A man working in tourism in one of the communities mentioned that tourism was helping his people to *“salir adelante”* (get out ahead). When asked to explain this further, he said tourism was helping them *“to move out of the poverty there is here.”* He continued:

We don’t need clothing or food. We get our water for free. What we do lack is money. The issue of economy is the problem. Here, we don’t need anything – we have fields, we have animals. But we do lack a little money – a steady job and a fixed income.

Often times, young people here want to go and study, but they can't pay to do it! I can't continue as I am. That's why I'm seeking out alternatives like tourism. (QT-3)

As can be seen from this quote, descriptions rarely emphasized money as an end in itself, but rather as a means to other desirable ends (e.g., paying for a child's education; Sen, 2000). For those with less monetary wealth, acts of reciprocity through the Andean tradition of *ayni* (you help me, and I'll help you) appeared as important as financial stability for reducing vulnerability to potential shocks. For example, a previous President of the community of Amaru suggested that, while income from tourism was helpful for his people, *ayni* was essential to their way of life:

Since we don't earn anything from the government, we are producers of agriculture. We aren't professionals. But thanks to tourism, we are left with something. Frankly speaking, income from tourism helps us to eat, to buy clothes for our kids, and to educate them... Thankfully we get an income from tourism. Food, money, field, work. Ayni. Today for me, tomorrow for you. This happens down to the very sewing of seed. We're all fed because we care for each other in that way. We don't receive anything from the government, not a thing. That's why we have to live with ayni. (AT-1)

Such acts of reciprocity appeared to offset deficiencies in income or government support.

However, some people seemed to think that tourism alone played a significant role in improving lives. In Sacaca, a member of the tourism association said that his community was “*better with tourism, because it helps us with many things. For example, economically, and there is enough work for everyone. With tourism, people here can escape poverty*” (SI-6).

While some individuals suggested that tourism could alleviate poverty through increased employment and income, others viewed money in a negative light, expressing an apparent

distaste for the current economic system. The *Promotor de Turismo* (Tourism Promotor) of Chinchero, where Cuzco's new international airport is currently being built, described his disappointment with the inequalities wrought by foreign influence in and ownership over regional development. *"Money always makes a disaster of things...The airport is not going to belong to Chinchero. It won't belong to Urubamba. It won't belong to Cuzco. It won't even belong to Peru. It's being built through foreign investments and foreign money, so that foreign companies – big businessmen from overseas – will be the owners and beneficiaries"* (G-2).

Highlighting this transfer of ownership, one tourism association member from Qorqor had received USD \$100,000 for selling her parents' field to airport developers – far more money than she or her husband had ever dreamed of having. Naturally, this generated concerns not only with how the local landscape and culture would change in the years to come, but also with how their newfound wealth should be managed or invested.

In a similar vein, Fernando² – a farmer and store owner from Sacaca – described the paradox of possessing greater money-making potential (e.g., through work as a porter on the Inca Trail) while experiencing increasing economic woes (e.g., having to pay for utilities or clothing). His frustrations appear in his perceived need to slave away on the Inca Trail in order to earn a stable income and engage in consumptive behavior – purchasing things that his parents never needed nor worried about.

In 1960, there was no money here, no work. Now, what do we have? We only have the Inca Trail. That's the only hope for the farmer. At least I also have a store here, to survive. But many people don't have anything...It's miserable working on the Inca Trail. We are slaves there...Before, our parents didn't think about educating their kids, they didn't worry about paying for electricity, nor about how to clothe themselves, because

they made their own clothes. Now we have many economic problems. We have a tremendous worry now because, if we sell our crops, what is left for us to eat? ... For that reason, we look for other work. I've stopped cultivating my fields; I have to dedicate myself to work that brings a monthly income. The poor farmer – he doesn't know how to overcome. (SN-3)

These accounts suggest that income first discourses of development have become intertwined with local perceptions of poverty and well-being in rural communities outside Cuzco. Such overlap “becomes blurred when development is framed as a function of capital capture” (Herrera, 2013, p. 293), with clashing epistemologies reflected in perceptions of tourism both as a means for escaping poverty, as well as a contributor to slave-like conditions stemming from unfettered capitalism and rising preoccupations with money. In light of these incongruities, attempts have been made by the Peruvian state in the past decade to better address local-level needs ignored or overlooked by the market. Perceptions of poverty and tourism practice related to needs first discourses of development are now considered.

Needs First Development

The pre-colonial political economy of the Inca – whose rule between the 12th and 16th centuries spanned outward from the ancient capital of Cuzco to cover large swaths of present-day Peru, Bolivia, Chile, and Ecuador – was characterized by policies that criminalized idleness, forbade families to change residence without a license, assigned and recognized districts for work in specific areas (e.g., mining, agriculture, metallurgy, animal husbandry, etc.), and promoted the welfare of both long-term residents and recently conquered peoples (Prescott, 1877). Given access to an array of primary and secondary documents housed in Madrid's *Real*

Academia de la Historia, Prescott (1877) alludes to characteristics of a kind of traditional welfare system used by the Inca before Pizarro's arrival to the region in 1528:

...the providence of the [Inca] government usually left a large surplus [of grain] in the royal depositories, which was removed to a third class of magazines, whose design was to supply the people in seasons of scarcity, and, occasionally, to furnish relief to individuals whom sicknesses or misfortune had reduced to poverty; thus in a manner justifying the assertion of a Castillian document, that a large portion of the revenues of the Inca found its way back again, through one channel or another, into the hands of the people. (p. 60)

In colonial and post-colonial Peru, this level of attention to citizens' needs has apparently diminished, contributing to feelings among some (like the ex-President of Amaru, quoted earlier) that the Peruvian state is 'far away and alien'. However, in recent years, a devolution of decision-making power from national to municipal government institutions has sought to close the government-citizen gap. Government expenditures at the sub-national level, for example, "increased substantially from 10 per cent in 1999 to about 34 percent in 2007" (Escobal & Ponce, 2011, p. 376). This fiscal decentralization has been coupled with participatory budgeting processes by which rural communities can interact with municipal governments to decide how tax revenues (e.g., from entrance fees to archeological sites like Machupicchu) might be spent to meet needs of the vernacular community (Vincent, 2014).

In rural communities outside of Cuzco, these policies have led to an array of government-supported projects, especially in municipalities where the commodification of Inca ruins or other 'sites of significance' has generated substantial tourism revenues. Pisac, located about 45 minutes from Cuzco by car, is one municipality that has used tourism revenues to support needs-based development efforts. Recent projects in the nearby communities of Sacaca and Amaru, for

example, include the construction of a center for maternal and infant health, a new library, soccer fields, and bathrooms with toilets, showers, sinks, and running water. During a conversation held in his office at the municipal hall, the mayor of Pisac expressed his intention – pending local interest and participation – to connect each community to the internet, hoping to support students from those rural areas by reducing their need to come into Pisac to get online (G-3).

Needs-based projects like these are geared toward providing access to water, healthcare, education, and other services that often comprise discourses of multidimensional poverty alleviation (Alkire & Santos, 2013; United Nations, 1995). In many ways, local accounts of poverty and tourism practice appeared to align with these discourses, placing particular emphasis on educational needs as both a cause and characteristic of cyclical poverty in the region. One tourism association member stated:

Poverty does exist in Sacaca. There are widows and orphans. There are also those who haven't been educated nor go to school. That's poverty, right there. We don't get out of poverty only with tourism, but also with the Inca Trail, and with other work. Before, we didn't think along those lines, about being poor. Sometimes, those of us from the country want nothing more than handouts. We don't want to do our part. (SI-8)

As seen here, many people linked poverty to a lack of education and looked to tourism as a way of covering educational costs for their children (e.g., living expenses to attend secondary or post-secondary school in the city). Farming alone could rarely cover these costs (“*Sometimes we don't have much money, and our products from the fields are only used for personal consumption, for the family. It isn't enough to educate our kids*”; AT-3), alluding to the need for alternative work in tourism. As one parent said, “*We want to have more tourists here in Qorqor. Now, we have*

very little economically, but we want to gain more from tourism in order to educate our kids. Everyone is thinking that here” (QI-8).

Needs left unmet by the state or the private sector outside Cuzco were being addressed to varying degrees by the voluntary sector, highlighting the contribution of NGOs, non-profits, and social enterprise to development in Latin America (Calderon, 2003; Scarlato, 2013; Villalba, Jubeto, & Guridi, 2014). In the community of Chichubamba, for example, the Spanish NGO ProPeru partnered with Intrepid Travel to give ceramic water filtration systems to all community households (some filters were still in use at the time of this study). To address local nutritional deficiencies and earn money, several women in Amaru worked with a Pisac-based non-profit organization to prepare and sell nutritional/protein powder drinks to kids or farmers as they walked to their schools or fields each morning (each drink cost five soles, or ~USD \$1.80). One man alluded to how needs were being met among his people, despite their lack of money:

It’s something we always talk about in our [monthly] assemblies – how to support the people of Sacaca. The evangelical churches, various associations, NGOs – they support us. Here, our families support each other more than anything, but we don’t have the money to be able to offer each other economic support. We do have materials and products, but we don’t have money. (SN-6)

Such comments suggest that needs first discourses of development in Peru may be correlated with local interests and accounts of poverty and tourism practice around Cuzco. However, some comments suggested that local ‘needs’ were sometimes overstated and even exploited to justify unnecessary government action or the unsolicited intervention by non-profits and NGOs. In Ollantaytambo, for example, some felt that NGOs were doing little to meet the needs of nearby rural communities. Two local people, in separate conversations, referenced a

recent speech given by Ollantaytambo's *alcalde* (mayor) in which he questioned whether the high density of NGOs in town were really benefiting local people or merely supporting the comfortable lifestyles of NGO employees. *We have over 40 NGOs in this town, and what have we seen for it? A large home for NGO employees here, a new car for them there, while living conditions for our people do not change.* Whether or not these were the mayor's actual words, local views suggested that discourses of development may have been, in some ways, ignoring the rights of local people by failing to address inequalities and issues of power in the region. These concerns are now explored by comparing local views of poverty and tourism practice with rights first discourses of development.

Rights First Development

Local accounts and ongoing civil unrest in and around Cuzco allude to an underlying distrust and frustration among indigenous people with national policies and regional tourism practice. For example, a particularly controversial *inciso* (clause) of Law 29164 (Artículo 2, Inciso C) specifically permits tourism concessions to be granted for privately-owned restaurants and hotels, of four stars or better, *within* national heritage sites, increasing contact between foreign companies and nearby indigenous communities. The clause, and several of its counterparts, incited widespread protests in 2008, when thousands of *Cuzqueños* took to the streets to express their disapproval of the policies (Ruiz-Rubio, 2009).

Overt demonstrations like these often represent the culmination of a long history of frustrations and mounting distrust of those in power. Until a tipping point is reached, more covert methods may be used (e.g., radio) to vent growing disapproval of contentious politics and

tourism practice (Lang, 2012). One woman in Amaru, for example, described her view of tourists and how she had been influenced by anti-tourism sentiments in the rural Andes:

Apparently, tourism is something bad here. The problem is terrorism. This doesn't occur so much in Amaru; it's more in Cuzco, in Ayacucho, and where the mountains meet the jungle. What I think is that tourists often come here saying, "I am a tourist," but with that influence of terrorism. That's the way I think, internally. I don't say it to others; it's just how I think, personally. On the local radio stations, sometimes they say [in Quechua] that we should not receive tourists, because tourists can be deceptive. That's what I've heard. (AN-8)

The potential influence of such sentiments (i.e., that people posing as tourists might actually be terrorists) was seen in one Andean community just months prior to this study, when local people attacked three tourists from Wyoming who were trying to camp in the town of Palca, outside Machu Picchu (Moran, 2013). While the reasons for the attack were never revealed, the incident highlights an underlying distrust of foreigners by those living in rural areas outside Cuzco, as well as a backlash against outsiders' apparent disregard for local interests.

Rights first discourses of development, conveyed in part by the kinds of violent and subversive struggles for justice and power described here, appeared linked to local perceptions of poverty. In particular, lack of local ownership over development processes and tourism practice represented a concern for rural communities outside Cuzco. With respect to development processes, the Promotor de Turismo of Chinchero described the lack of local involvement in and approval for the new international airport being built. *"This airport is being built now without having consulted the communities around here, without having talked with the villages, and without having thought much about its impacts at the community-level"* (G-2). With respect to

tourism practice, Fernando – the store owner from Sacaca – linked poverty to an apparent subjugation of local people to foreign companies operating in the region:

I work as a porter on the Inca Trail; there are about 7,000 of us [registered]. We are farmers, born here. How do you view our people? Many of us are dying of hunger. Our society isn't doing well economically nor agriculturally. We don't receive technical support and we are very behind in Sacaca in education and agriculture alike. These things generate a delay. We Peruvians should be overseeing everything here that has to do with tourism, but we are slaves. Who is controlling all this? Foreign companies, while we stay in the same place, without an exit. We are now in poverty. (SN-3)

These comments allude to a growing *awareness* among local people of the inconsistencies between national level development discourses (encouraging increased foreign ownership over tourism practice) and local-level rights and interests, suggesting that a form of poverty alleviation through psychological empowerment may be occurring in the region (Scheyvens, 1999; Ramos & Prideaux, 2014).

CONCLUSION

An evaluation of local accounts of poverty and tourism practice in rural communities outside of Cuzco highlights ways in which discourses of development in Peru have become “produced and reproduced as a common sense part of people’s understanding of the world and their place within in” (Curtis & Spencer, 2012, p. 179). In particular, the accounts and observations presented in this paper suggest that people living outside Cuzco have embraced a plurality of views related to poverty and tourism’s potential for reducing it, aligning to varying degrees with income first, needs first, and rights first discourses of development. These views

have been influenced by the pervasion of the tourism machine into Cuzco's political economy and social fabric, underscored by the increasing presence of foreign companies in the region and the growing dependence of indigenous people on employment in either rural tourism or on the Inca Trail. Alluding to these trends, one man from Sacaca went so far as to say, "*Without tourism, Cuzco itself will die. Cuzco is tourism*" (SN-5).

At the same time, local accounts of poverty and tourism practice also reveal a certain resistance to both income first and needs first approaches to development, fomented by the apparent discord between people's perception of how things are, how things should be, and how things could be (i.e., historical, normative, and practical dimensions of well-being; Copestake, 2011). Regarding income first discourses of development, this resistance appears to be a fight against "globalization-from-above" and against "unfettered capitalism as the harbinger of individual liberty and material abundance, creating optimal consumer choice in the marketplace and a rising tide of affluence that lifts all boats" (Carroll, 2007, p. 37). In Cuzco, such resistance appears weakened when local interests and perceptions become muddled with the development goals of an elite global network of nation-states, multi-national corporations, and supranational organizations influencing regional tourism practice.

This kind of muddling also appears in the overlap between local interests and needs first discourses of development. On one hand, people living in rural communities outside Cuzco often view tourism-generated income as a means for reversing cyclical poverty stemming from a lack of education or technical training (e.g., in agriculture). On the other, local frustrations exist with the ways in which the state or NGOs (e.g., in Ollantaytambo) apparently prioritize self-preservation over meeting community needs, alluding to an underlying resistance to ways in which development is defined or practiced. These findings suggest that addressing

multidimensional poverty via participatory budgeting, fiscal decentralization, or other development mechanisms may require first addressing broader structural concerns, such as inequalities in communities or wider impacts of the economic system (Araujo, Ferreira, Lanjouw, & Ozler, 2006; Bebbington, Abramovay, & Chiriboga, 2008; Harrison, 2008).

This article sought to compare development discourses and local accounts of poverty and tourism practice around Cuzco. Attempting to apply a local first approach to this evaluation is not exempt from limitations and concerns. First, the categorization of discourses may contribute to the construction and reification of social processes, motivations, and institutions linked to tourism and development in Peru, reproducing and legitimizing the very discourses being evaluated and giving them “all the appearances of the *natural*” (Bourdieu, 1994, p. 4). These discourses are not static entities, and they undoubtedly overlap in indistinguishable ways, leaving their myriad effects and characteristics interwoven and subject to change. As such, it must be acknowledged that while Copestake’s typology represents a useful framework for considering the potential influence of broader discourses on local interests and perceptions, the discourses it categorizes should be viewed as dynamic processes and as abstractions themselves.

Second, rights first development and local views may appear, at first glance, to be strongly related. However, this relationship is based on select observations and accounts that highlight issues of inequality or social justice and overlooks the fact that many people expressed no concerns with the current system. That only some individuals appeared to be frustrated with the increased presence of foreign companies in and around Cuzco alludes either to a lack of awareness of the way things could or should be, to a distrust of the research team such that actual local views remained concealed, or to a considerable agreement between local interests and regional development and tourism practice. In each of these cases, it seems clear that one of the

basic conditions for local first development is that it “should be linked to the construction of a citizens’ consciousness based on the exercise of rights” (Villalba et al., 2013, p. 237; Freire, 1970).

Third, emphasizing a local first approach to development has the potential, in some ways, to glorify Peru’s precolonial past by suggesting that local frustrations with the system are something new. One might speculate, however, that indigenous communities subjected to Inca rule may have experienced similar frustrations, toiling all their life for the ruling class (Prescott, 1877, p. 62-64). In fact, it is possible that “these idyllic village communities, inoffensive though they may appear, had always been the solid foundation of...despotism, that they restrained the human mind within the smallest possible compass, making it the unresisting tool of superstition, enslaving it beneath traditional rules, depriving it of all grandeur and historical energies” (Marx, 1853). As such, local first approaches to development may require a rethinking of deprivation to incorporate not only local interests and views, but also evaluations of why resistance to or frustration with the encroachment of outsiders may be absent from local accounts.

From a practical standpoint, a combined emphasis on the rights, views, and interests of local people in development may thus be significant for uncovering issues of power in policy creation. Comparisons of development discourses and local perceptions of poverty and tourism around Cuzco, in particular, may help to increase “the capacity to build social knowledge into policy or to promote a localist stance” in development practice (Mosse, 2013, p. 240). The underlying purpose of such evaluations would be to promote an overall approach to development and research that could be considered a “decolonizing rather than recolonizing force” among indigenous peoples (Butler & Menzies, 2007, p. 27) – redirecting the analytical focus away from tourism’s poverty alleviating potential and onto people’s motivations for becoming involved in

tourism (or not) in the first place. Given the emphasis on tourism as a principal component of development strategies currently pursued by government, industry, and the voluntary sector (e.g., NGOs) in Peru, such an approach seems essential for overturning the negative effects of contentious politics and ‘development-from-above’ among rural communities outside Cuzco.

Endnotes

1. According to Wacquant (2010), a “minimalist sociological characterization” suggests that neoliberalism involves economic deregulation, welfare retrenchment, an intrusive penal system, and an emphasis on individual responsibility (including the downplay of corporate liability in view of state incompetence). He writes:

This project is carried by a new global ruling class in the making, composed of the heads and senior executives of transnational firms, high-ranking politicians, state managers and top officials of multinational organizations (the OECD, WTO, IMF, World Bank, and the European Union), and cultural-technical experts in their employ (chief among them economists, lawyers, and communications professionals with germane training and mental categories in the different countries). (p. 213)

2. All names have been altered and a coding system has been employed in this article to retain respondent anonymity.

CHAPTER VI

CONCLUSIONS

The research presented in this dissertation has sought to address a myriad of issues of both practical and theoretical significance related to the relationship between tourism, poverty, and development in Peru's Valle Sagrado. Although participant observation, field notes, and tourism-related documents represented essential sources of data in the study, findings were based primarily on the perceptions and interests of people living in four rural communities located just outside the ancient Inca capital of Cuzco, where an array of socio-political processes and the increased presence of foreign companies and international travelers are fomenting significant regional change.

From a practical standpoint, this research applied a team-based, ethnographic methodology known as Rapid Qualitative Inquiry (RQI) to provide Intrepid Travel with a preliminary understanding of the impacts of its tours based on insiders' views. Reports were compiled, in alignment with the overarching purpose of this dissertation, to understand and describe local perceptions of tourism-based poverty alleviation among the four Valle Sagrado communities being visited by Intrepid groups at the time of the study (i.e., Chichubamba, Amaru, Sacaca, and Qorqor). These reports were written in both English and Spanish and distributed not only to Intrepid Travel, which funded the project, but also to each of the tourism associations working with Intrepid in the four communities (Appendices II-VI). Many aspects of these reports were incorporated into the first article of this dissertation (Chapter III), addressing research question one in exploring local perceptions of empowerment through tourism.

Also from a practical standpoint, the most significant outcome from this research may be the increased interactions between tourism association representatives and Intrepid staff –

realized through the four-community workshop in Chichubamba on November 30, 2013. As a result of this workshop, Intrepid staff (from offices in both Cuzco and Lima) made significant changes to several major aspects of the community visits offered to Intrepid passengers as part of paid itineraries. The moments of reflection and planning among association members leading up to the workshop played no small role in the reconfiguring of institutional dynamics influencing Intrepid-community interactions. In terms of personal project highlights, being invited to join 20 families in Qorqor one night, circled up with mothers, fathers, and children under a starlit sky to discuss the association's long-term vision and interests related to Intrepid visits, represented one of my most memorable experiences in Peru.

Such opportunities for reflection and dialogue among local people influenced both internal associational dynamics and extra-associational interactions with Intrepid. This appeared to support my personal aim, as mentioned in Chapter I, to make this research significant for the communities involved. The second article of this dissertation (Chapter IV) highlights local strategies and interests related to institutional change in the communities of Chichubamba and Qorqor. The findings presented in the article address research question two by suggesting that individual and collective functioning may be enhanced through the reciprocal effects of local strategies and the institutional context (Jessop, 2001; 2008). As suggested by Yang, Ryan, and Zhang (2013), the practical implications here “again point to the need for an emic approach to the management of change, and [suggest] that the etic will not be wholly satisfactory in the outcomes it will achieve” (p. 90).

While it primarily considers local perceptions of the tourism-poverty nexus pertaining to Intrepid visits, the research presented in this dissertation goes beyond an evaluation of community interactions with Intrepid Travel. It also considers local perceptions related to

broader development trends, poverty, and regional tourism practice. As the number of yearly visitors to Machupicchu continues to soar (Peruvian Times, 2014; UNWTO, 2012), understanding these perceptions may support the creation of policies that can more effectively address economic, social, and environmental concerns in the region. These practical considerations are highlighted in the third article of this dissertation (Chapter V), addressing research question three by drawing explicit attention to agreements and incongruities between development discourses and local accounts of tourism-based development.

Making a final assessment of the extent to which Intrepid Travel and regional tourism in and around Peru's Valle Sagrado have helped to alleviate poverty for local people (i.e., addressing the fourth research question) requires several closing considerations based on the entirety of the findings presented in this dissertation (Chapters I-V). It might be said that Intrepid-community interactions have contributed to poverty alleviation for tourism association members, based on local descriptions of unlocked opportunities stemming from work in tourism. However, it is clear that these opportunities have not resulted merely from interactions with Intrepid but also from a dynamic range of personal qualities, socio-political arrangements, and environmental factors that make their realization possible (Robeyns, 2005).

Additionally, as described in article two, poverty alleviation appears to depend as much on *local decisions to act* as it does on capabilities, opportunities, or freedoms. In other words, the act of choosing, as the capability approach suggests (Figure 2.1), is essential to processes of tourism-based development or poverty alleviation. Scheyvens (2011) notes:

It can thus be argued that development is a process which requires active participation and empowerment of the poor so they can determine their own futures and put in place strategies to achieve their goals. They may demonstrate empowerment through

transforming existing structures and forming their own social movements for change. The poor can be active agents of change rather than passive beneficiaries of processes determined by others. (p. 23)

The newfound freedoms and positive change experienced by local people in this study, then, are ostensibly the result of personal agency as much as they are the outcome of structural/institutional dynamics or Intrepid's agreeing to bring visitors into communities in the first place.

At the same time, while tourism association members receiving Intrepid visitors in each community alluded to primarily positive changes stemming from tourism, the diversity of local accounts on poverty and tourism practice *in general* highlights the complexity of the phenomenon under consideration. The findings in article three (Chapter V), in particular, justify a more nuanced understanding of tourism-based poverty alleviation based not only on local perceptions, but on external factors and broader societal or political trends. Specifically, in exploring the tourism-poverty nexus among indigenous people, an evaluation of 'local perceptions' may require the incorporation not only of indigenous *voices* related to poverty and tourism, but concomitant analyses of particular *actions* (e.g., social movements, civil unrest, subversive behavior) characterizing ways in which local communities react to or resist imbalances of power within specific tourism arrangements.

Of theoretical significance, the capability approach has seen a shift in its emphasis on socially dependent individual capabilities (Sen, 2002) to include collective capabilities made possible through myriad forms of social/institutional interaction (Ibrahim, 2006). This shift seems especially important for PPT studies involving indigenous people who, like those of Peru's Valle Sagrado, have experienced new opportunities through their direct involvement in

rural/community-based tourism associations. Further studies on the expansion of collective capabilities for indigenous people working in tourism outside Cuzco may be needed to better understand linkages between tourism, broader socio-political trends, and poverty alleviation.

Besides the further exploration of collective capabilities in this fashion, future studies may take into account several additional considerations. Firstly, there is a need to understand not only local perceptions of tourism-based empowerment, but also ways in which tourism practice and other factors may generate *changes in local perceptions themselves*. This would require long-term partnerships and interactions with local people to explore how local perceptions, motivations, and strategies may be influenced by historical and contextual factors such as the construction of Cuzco's new international airport near Chinchero, intra- or inter-institutional dynamics affecting tourism associations or Intrepid-community interactions, and the increased number of tourists and travel companies in and around Cuzco.

Other considerations for future studies include further analyses of local views of subjective well-being (Copestake, 2011; Costanza, 2014); further exploration of linkages between issues of power and the relative lack of interest in rural tourism or the lack of local-level resistance to hegemonic processes (Cohen & Cohen, 2012; Lukes, 1974; Mowforth & Munt, 2009; Naughton, 2014;); and comparisons of potential differences in local perceptions of tourism-based poverty alleviation *within households* to highlight gender differences pertaining to PPT or indigenous tourism outcomes (Vijaya, 2014).

As with all research, this dissertation is characterized by myriad limitations. Several of the most notable of these will be discussed here. First, as alluded to above in the expressed need for longer-term analyses to be incorporated into future studies, the duration of this project and time spent within communities and in the Cuzco region was undeniably short. Spending three to

four weeks in each community, and just under six months in Peru, did not allow for the kind of supersaturated analyses of spatio-temporal factors that might fortify ethnographic research on the tourism-poverty nexus. Considerations linking micro- to macro- and historical aspects of tourism-based development in the Valle Sagrado are thus limited in scope.

Second, while RQI presents a potential methodology for attaining a preliminary understanding of a situation based on team-based data collection and analysis, this study was ostensibly weakened by the small size of the research team. With just two individuals (i.e., I and my research assistant) collecting and analyzing data in each community, the extent to which the findings presented here may rest on so-called ‘insider views’ is questionable. Some of these limitations were counterbalanced 1) by the direct involvement of tourism association members in scheduling interviews, discussing findings, considering next steps, and brainstorming suggestions related to tourism processes in each community, and 2) by the fact that my research assistant had worked closely with and still had family in the communities. However, the relatively narrow composition of the research team was a noticeable concern for the research.

A final limitation of this study, as discussed briefly in the closing section of the second article (Chapter IV), relates to the potential for any findings here to be presented as master categories – reified as representations of identifiable truth and making deterministic claims to tourism’s poverty alleviating power (Sassen, 2008). All descriptive and evaluative research may be imbued with language by which researchers themselves, being influenced by the very systems or discourses under consideration, may contribute to reproducing and legitimizing those systems and discourses as ‘common sense’. Bourdieu (1994) alludes to this limitation in describing the reification of institutions:

By realizing itself in social structures and in the mental structures adapted to them, the instituted institution makes us forget that it issues out of a long series of acts of *institution* (in the active sense) and hence has all the appearances of the *natural*. (p. 4)

These concerns suggest that tourism-based poverty alleviation may be more appropriately described as the outcome of complex and interconnected processes that will always remain only partially identifiable, but whose identification may be most closely approximated by understanding and describing the perceptions of those people most intimately associated with them.

CLOSING

As international tourism continues to expand into and affect rural, remote, and indigenous communities around the world, PPT will likely receive ongoing attention as a potential tool supporting development and poverty alleviation efforts. This dissertation has suggested that effectively evaluating the effects of PPT on these efforts will require an increased focus on both emic and etic considerations across multiple spatio-temporal scales.

Essential to these evaluations will be local perceptions of and strategies for change – alluding to the roles of both individuals and institutions in enhancing individual and collective functioning through tourism. Here, tourism-based poverty alleviation may thus be described in terms of tourism-linked processes and outcomes which have made desirable achievements more effectively possible for local people. When local accounts suggest that tourism has created or increased certain deprivations (measured through local accounts of restricted or undesirable functioning), strategies may be considered to address those deprivations through slight or drastic forms of institutional reconfiguration. In some cases, depending on the broader socio-political

and historical context, resistance to imbalances of power (e.g., the denial of local or indigenous rights) may foment violent or subversive opposition to the status quo, calling for more radical approaches in addressing systemic or cyclical poverty.

While some may disparage the emphasis on local views presented here, the benefit of highlighting seemingly innocuous and insignificant accounts may be “that it is precisely in small, local storytelling that political transformation becomes possible, even if we cannot know in advance where our stories will lead” (Cameron, 2012, p. 588). In this way, from both a practical and theoretical standpoint, understanding and describing the “peculiarity or mundanity” (Lorimer, 2003, p. 200) of local accounts and perceptions may support emancipatory policies and evaluations of tourism-based development more than some might expect.

None other than the incisive Sherlock Holmes may have summed up best the insights that the research presented in this dissertation – being particularly focused on local perceptions and everyday experiences – might lend to these efforts. His comments to Dr. Watson remind me of the many experiences I shared with my research assistant and local people in Valle Sagrado communities, less than two years ago:

Life is infinitely stranger than anything which the mind of man could invent. We would not dare to conceive the things which are really mere commonplaces of existence. If we could fly out of that window hand in hand, hover over this great city, gently remove the roofs, and peep in at the queer things which are going on, the strange coincidences, the plannings, the cross-purposes, the wonderful chains of events, working through generations, and leading to the most *outré* results, it would make all fiction with its conventionalities and foreseen conclusions most stale and unprofitable. (Doyle, 2003, p. 225)

Espousing a constructivist/interpretivist paradigm in exploring local perceptions of tourism-based poverty alleviation is rooted in understanding and describing the strangeness of ‘common’ events and experiences. In the end, calls for more meaningful, effective, and emancipatory evaluations of the influence of tourism on poverty alleviation give rise to an array of questions. Whose definition of poverty is being used? How useful are such evaluations for the communities themselves? To what extent are baseline measures of existing poverty required for these analyses? Are evaluations of poverty alleviation community-driven, or do they contribute to a form of interpellative subjectification of community members who are the supposed beneficiaries of tourism development (Althusser, 1971)? Can evaluations of multiple communities or tourism businesses be effectively combined as the scope of evaluation moves beyond a certain destination community to incorporate more expansive regional- or national-level data?

Questions like these, and many others, reveal the challenges of characterizing evaluations of tourism-based poverty alleviation in the context of indigenous tourism. It is important to realize, as Milne (1998) suggested of sustainable tourism, that PPT may not be a definable endpoint. Rather, it may be “caught up in processes of ‘trial and error’ ...– a continuous process of social learning, linking and removing, ordering and reordering” (Van der Duim, 2005, p. 232). By taking the dynamic nature of tourism-based poverty alleviation into account, governments, travel companies, researchers, and community members can emphasize progress and learning over expansive, end-all resolutions, unlocking opportunities for indigenous people based on local perceptions, interests, and strategies for change.

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APPENDIX I

This report provides an overview of findings from a research project carried out from June-December, 2013. Funded by Intrepid Travel, the project explored tourism impacts among four indigenous communities visited by Intrepid groups en route to Machu Picchu. Local views and specific concerns are expressed in recommendations for Intrepid and communities, supporting sustainability through unlocked opportunities for local people.

POVERTY ALLEVIATION THROUGH TOURISM?

*Community Views of Intrepid
Travel in Peru's Sacred Valley*

David Warner Knight

I. Tourism in Peru's Sacred Valley

Travelers of all kinds are drawn to Peru for its remarkable biodiversity, its extraordinary landscapes, and its rich cultural heritage. Recovering from a decade of political and economic instability in the 1980s, the Peruvian government created the Commission of Promotion of Peru (PROMPERU) in 1993 to promote the nation's image as a global tourism destination. Branding and advertising efforts appear to have worked, with the country seeing a 380% increase in international tourist arrivals between 1995 and 2010. In 2013, Peru's tourism industry generated an estimated 3.8 billion USD and brought in over three million visitors.

With rising interests in cultural and adventure tourism, many of the international visitors to Peru are drawn to the Incan ruins at Machu Picchu. Once part of a vast civilization spanning from Chile to Ecuador, these ruins are located 50 miles northwest of the city of Cuzco in the south-central highlands and represent the most frequently visited destination in Peru. Many aspects of ancient Inca culture live on in this 50 mile stretch of land between Cuzco and Machu Picchu – an area known as the Sacred Valley. Among the many rural communities of the region, the Inca language of Quechua is still spoken, colorful textiles are woven and worn, and gastronomic delights such as native potato, quinoa, and Guinea pig are commonly consumed. Not every tourist augments their trip to Machu Picchu with a visit to one of these communities, but tourism trends (including the current construction of an international airport outside Cuzco) suggest that the Sacred Valley will be seeing more visitors in the future.

II. What is Poverty?

Internationally, individuals living on less than \$1.25 USD per day are often said to be suffering from extreme poverty. However, there is increasing recognition that poverty cannot be described in economic terms alone. A lack of money may hinder one's ability to live the life he/she desires, but other factors may also be at work. On a personal level, ill health, malnutrition, lack of education, and other deprivations may hinder our ability to live the kind of life we would like to live. On a broader scale, things like political unrest or cultural norms leading to gender or racial inequality can also restrict people's ability to lead flourishing lives. Poverty has thus been described more recently in terms of *unfreedom* – as being deprived of the opportunity to do or be that which we value. In this way, governments and businesses interested in fighting poverty should place their focus not on economic growth alone, but on unlocking opportunities for people based on site-specific interests and needs.

In the Sacred Valley and surrounding highlands, tourism revenues have been used to address deprivations experienced by many Quechua communities. For the four communities receiving Intrepid Travel groups (Chichubamba, Amaru, Sacaca, and Qorqor), government projects funded through tourism taxes and visitor fees have been implemented to improve infrastructure and to support local development. These projects have included the construction of clinics focused on infant and maternal health, small libraries with books and computers (internet still to come), soccer fields, drainage systems, and bathrooms with showers/sinks/flushing toilets. Due to the high volume of tourist traffic in the region, government has also encouraged people in many communities to form home-stay or rural tourism associations and to begin receiving visitors in their

homes. The tourism associations working directly with Intrepid Travel in each of the four communities were the primary focus of this study.

III. Intrepid Travel Community Visits

While visiting a Sacred Valley community (Chichubamba, Amaru, Sacaca, and Qorqor are all within a 1.5 hour drive from Cuzco), Intrepid Travel groups interact with members of the tourism association working with Intrepid in that community. Intrepid groups are small (no more than 16 passengers) and are led by a Peruvian guide who provides translation from Quechua or Spanish into English for the visitors. Before Intrepid groups arrive, members of the local tourism association may spend up to several hours preparing lunch and setting out their crafts or textiles for visitors to purchase. Upon arrival, groups usually begin by eating lunch in an association member's home or in a communal meeting space. Lunches often include soup and a main dish (e.g., chicken or Guinea pig), though vegetarian and gluten-free options are available. While some ingredients are purchased at nearby markets, meals usually contain fresh vegetables (potatoes, green onions, carrots, or quinoa) that association members grow themselves. After lunch, visitors may participate in activities and have an opportunity to purchase goods or crafts from association members. In Chichubamba, visitors may attend one or more of six different *talleres* (workshops). Workshop topics include chocolate/coffee, ceramics, floriculture, agriculture, honeybees, and chicha (corn beer). In Amaru, Sacaca, and Qorqor, visitors learn about traditional weaving practices and have an opportunity to purchase textiles from association members, including blankets, hats, belts, bracelets, and more. After spending several hours in a community, Intrepid visitors and their guide bid tourism association members farewell and continue on their way to Machu Picchu.



An Intrepid group poses for a photo after harvesting barley with members of the tourism association

The honeybee workshop in Chichubamba is a popular activity for Intrepid visitors.



IV. Community Overviews

Table 1. *Overview Of Tourism Associations By Community.*

Characteristic	Community			
	Chichubamba	Amaru	Sacaca	Qorqor
• Approx. population	684	1,010	655	200
• Elevation (meters)	2,870	3,800	3,450	3,900
• Name of tourism association ¹ working with Intrepid (year formed)	<i>Asociación de Agroturismo – Agrotourism Association</i> (2005)	<i>Comité de Mujeres, Amaru – Committee of Women, Amaru</i> (2008)	<i>Asociación Sumaq Warmi – Rich Women Association</i> (2012)	<i>Asociación Munay Ttica - Beautiful Flower Association</i> (2013)
• Year association began receiving Intrepid groups	2008	2010	2010	2013
• # of members (2013)	14	12	12	24
• Percent female members	79%	83%	75%	92%
• Estimated number of Intrepid visitors (2013)	800	350	227	515
• Tourism season	Year round	April – Dec	April – Dec	Year round
• Source of equally distributed income	None	Lunch	Lunch	Lunch
• Source of individual income	Lunch and workshop revenues (e.g., selling ceramics or chocolate)	Hand-woven textiles	Hand-woven textiles	Hand-woven textiles
• Price of lunch for visitors ²	15 soles (6 USD)	15 soles (6 USD)	15 soles (6 USD)	25 soles (9 USD)
• Average monthly tourism income (per associate)	190 soles (70 USD)	54 soles (20 USD)	63 soles (23 USD)	40 soles (15 USD)
• Average monthly income from Intrepid (per associate)	114 soles (42 USD)	54 soles (20 USD)	63 soles (23 USD)	36 soles (13 USD)
• Tourism income as % of total monthly income (per household)	17%	29%	17%	23%

1. Chichubamba and Sacaca had only one tourism association operating in their respective communities as of 2013, while Amaru had a total of four and Qorqor had a total of two.
2. Exchange rate of 1 USD = 2.7 nuevo soles; all lunch prices cost 5 soles extra (~1.85 USD) if visitors wished to eat *cuy* (Guinea pig); the association in Qorqor charged more than other communities, preparing an Andean Buffet that offered an array of local foods rather than just soup and a main dish.

V. Local Views Of Tourism Impacts

Table 2. *Positive And Negative Change Generated By Intrepid Visits For Tourism Association Members.*

Reported Change ¹	Chichubamba	Significant Change Observed		Qorqor
		Amaru	Sacaca	
Positive				
Home improvement	X	X	X	
Increased quality of life	X			
Happiness with tourism		X	X	X
Providing for family	X	X	X	
Sharing culture/ideas	X			X
Overcoming, persevering			X	
Learning (e.g., business skills)	X	X	X	X
Women empowered	X	X	X	X
Social diversion with other associates				X
Negative				
Feeling pushed around	X			
Less time for other activities		X		X
Conflict/inequality in association	X			X
Conflict/inequality in community	X		X	X
Impeded communication	X	X	X	
Feeling demotivated from cancelled visits		X		

1. Themes identified via interviews, Intrepid/community/government records, and field notes. Intrepid Travel may not have been solely responsible for a given change, but company-community interactions did influence observed or reported changes to varying degrees.

VI. Recommendations

Table 3. *Actionable Findings.*

Concern ¹ Raised By Tourism Associations	How Intrepid Travel Agreed To Address Concern
<i>Confirmation of a group visit just one day prior gives little time to purchase ingredients, prepare lunch, and communicate with associates.</i>	<ul style="list-style-type: none"> • Trip leaders must contact community tourism associations three days instead of one day prior to a group's scheduled visit, informing the association of the number of lunches that will be purchased (communities will receive this amount, even if the number of lunches actually eaten changes).
<i>In some months, as high as 50% of group visits are being cancelled in communities.</i>	<ul style="list-style-type: none"> • While lunches are optional for visitors, the community visits are required as paid portions of passenger itineraries; that is, trip leaders (except for in extreme cases of a strike, severe weather, etc.) must visit the communities with their groups. If passengers are sick, they can decide to stay behind, meeting up with the rest of the group at a later time.
<i>Intrepid group arrival times are inconsistent.</i>	<ul style="list-style-type: none"> • Intrepid groups will arrive in the communities between 11 and 11:30am on the day of the scheduled visit.
<i>Passengers purchase textiles elsewhere before having a chance to buy from partner communities.</i>	<ul style="list-style-type: none"> • Trip leaders will not be permitted to make any stops with their groups at artisanal markets prior to a community visit.
<i>Lunch prices have not kept up with rising food costs.</i>	<ul style="list-style-type: none"> • Lunch prices in the communities will be raised from 15 to 20 soles (from 5.50 to 7.30 USD) per passenger.
<i>At times, trip leader contact info is not provided in the programs.</i>	<ul style="list-style-type: none"> • PEAK/Intrepid will provide each community with the contact info (telephone numbers) of all trip leaders.
<i>Trip leaders often demand that their group eats lunch or does an activity/workshop in a 'favorite' associate's home. While this may be done to help a friend or to provide passengers with the best possible experience, it ignores local norms that seek to distribute benefits equally among association members.</i>	<ul style="list-style-type: none"> • Trip leaders and chauffeurs will respect community decisions as to where lunch will be served, who will be providing a given workshop (e.g., 'talleres' in Chichubamba), and the activities provided. Passenger interests will still determine which workshop(s) the group will attend, but tourism associations will decide which associate will be providing that workshop (i.e., guides cannot choose favorites, as this increases conflict among associates).
<i>Associates have had difficulty knowing exactly when to visit the office in Cuzco to pick up programs. They sometimes make several visits because they are unable to reach the office, and programs aren't ready upon arrival.</i>	<ul style="list-style-type: none"> • Programs with the schedule of community visits for the upcoming month will be ready for pick-up by tourism associations on the 29th of each month. This means the Cuzco office should have programs prepared by the 28th. If the 29th falls on a Saturday or Sunday, the program should be ready by the Friday before the weekend on which the 29th falls.

1. Concerns were communicated in a gathering in Chichubamba on November 30, 2013. Participants included five Intrepid Travel staff, three representatives from each of the four communities, and the researcher and his assistant.

Table 4. *Remaining Recommendations For Intrepid Travel.*

Item	Recommendation
<i>Local involvement in trip leader training</i>	<ul style="list-style-type: none"> • Invite tourism association leaders from partner communities to interact and share with Intrepid staff during trip leader trainings, providing greater context of community histories/interests for trip leaders to share with passengers.
<i>Community summaries for trip leaders</i>	<ul style="list-style-type: none"> • Involve community tourism associations in creating handouts for Intrepid trip leaders, emphasizing local voices in descriptions of community and association backgrounds/challenges/demographics/etc. These handouts may augment the summaries compiled as a result of this research.
<i>Responsible Travel Coordinator position</i>	<ul style="list-style-type: none"> • Reinstate a full-time position at the Cuzco office to report on local interests, progress, concerns, etc., to guide interactions with tourism associations and to support long-term company-community partnerships. The individual hired should be familiar with community-based tourism development, with participatory methods, with local culture, etc. Job responsibilities might include providing workshops (in partnership with non-governmental organizations or government) on technology, gastronomy, accounting, and English language acquisition.
<i>Community partnerships</i>	<ul style="list-style-type: none"> • Pursue and communicate a course of committed involvement in those communities currently visited. This may entail creating a list of ‘expectations’ together with respective tourism associations so that all parties are aware of ‘game-ending’ behaviors (e.g., internal community conflict jeopardizing the safety of passengers, extreme focus on money-making while taking advantage of visitors, high numbers of Intrepid group cancellations, etc.). Desirable behaviors may also be outlined. Above all, this is about strengthening sustainable partnerships through trust as communities seek the assurance that Intrepid won’t just ‘move on’ to other communities when issues arise.

VII. Conclusion

Intrepid Travel visits have led to unlocked opportunities for tourism association members in Chichubamba, Amaru, Sacaca, and Qorqor. The visits have also created or amplified some negative changes in these communities. Negative tourism impacts were most apparent in the community of Chichubamba, where conflict was influenced by a lack of leadership, unequal distribution of benefits, and increased individualization among members. Poverty alleviation in each community was observed as association members reported unlocked opportunities through an increased command over economic resources. Unlocked opportunities included an enhanced ability to improve homes, to educate kids, to provide for families, and to improve overall quality of life. In all four tourism

associations, Intrepid visits also enhanced opportunities for women to work, to earn an income, and to be respected by their husbands. On November 30, 2013, space was given to share and address specific association concerns in a four-community gathering with Intrepid Staff. One of the primary concerns Intrepid agreed to address related to impeded communication stemming from schedule inconsistencies, unclear expectations, bad cell phone reception, or ongoing conflict with an Intrepid staff member in Cuzco.

This report provides a snapshot of local perceptions of Intrepid visits and tourism-based poverty alleviation. Individual community reports provide further information on research methods and community views, including specific comments made by local people on tourism impacts. It is hoped that the findings and recommendations presented in this study, based on the interests and views of Sacred Valley communities working with Intrepid, may unlock opportunities and enhance sustainable and mutually beneficial partnerships over time for Intrepid and local people.

APPENDIX II

INTREPID TRAVEL

Community-Based Tourism Research Briefing

Chichubamba, Perú

David Warner Knight and Nilo David Hanco Chauca
8/31/13



The third meeting with members of the Agrotourism Association: dinner, drinks, and dialogue.

I. Overview

Location	Chichubamba (altitude of 2,870 meters; 1.5 hour drive from Cuzco)
Households (2013)	153
Population (2013)	684
Research period	July 15 – August 15, 2013
Primary livelihoods	Agriculture (corn, straw grass, potato, strawberry, etc.), animal husbandry (chicken, sheep, cattle, Guinea pig, honeybee, etc.), floriculture, public works/construction, merchandising, chicha, ceramics
Avg. income/month	Men ~750 soles (278 USD), women ~262 soles (97 USD; values based on Tourism Association member questionnaire responses); compared to ~1,000 soles/month (360 USD) for residents of nearby Urubamba (based on the Proposed Plan of Territorial Conditioning, 2011)
Primary investigator	David W. Knight
Research assistant	Assisted with follow up research in later months.
Research team	Ongoing discussions regarding research questions and findings with members of the Agrotourism Association and the community according to availability and interest
Tourism Association	14 members (3 male, 11 female); created in 2005; receiving Intrepid groups since 2008

II. Research Info and Methods

Participatory approach	Responsible research prioritizes local interests and ways of knowing when addressing research questions and objectives. In Chichubamba, Agrotourism Association members were engaged in three dialoging sessions during their Association meetings to address issues of importance for them. Every effort has been and will be made to incorporate local involvement and feedback into methods, analyses, and reporting.
Observations/field notes	Included observations of lunch visits (6), workshops (8), Agrotourism Association meetings (3), and general community context (politics, culture, economy, society). Incorporated demographic and tourism information gathered from the Urubamba municipal hall, from Agrotourism Association records, and from the Intrepid office in Cuzco.
Semi-structured interviews	Number interviewed: 34 (13 male, 21 female; 14 Agrotourism Association members, ages 30 to 65; 17 non-members, ages 7 to 73; and 3 Intrepid guides thus far). Questions asked explored community assets, perceived tourism benefits/impacts, reasons for tourism involvement (or not), personal/community needs, changes in quality of life through tourism, ways to improve Intrepid trips, etc. Individuals interviewed were from geographically diverse locations throughout Chichubamba.
Questionnaires	Based on observations, notes, and interviews, 14 questionnaires were given to Agrotourism Association members requesting suggestions for the Association and for Intrepid, vision for tourism five years from now, information on tourism income and its use, etc.
Basic Value Chain Analysis	Involved social mapping process (creating a map to understand where tourism occurs, who is involved, who isn't, linkages between Agrotourism Association members, etc.), and analyzed data from participatory sessions, observations, interviews, and questionnaires to 1) explore how Intrepid trips may be impacting 'the poor', 2) identify local interests with respect to tourism in their community, and 3) compile a list of recommendations focused on improving the quality of life in the community.

III. Initial Findings

Economic impacts	<ul style="list-style-type: none">• From August 2012-July 2013, an estimated 715 Intrepid visitors were served lunch in Chichubamba, generating gross tourism revenues of 10,725 nuevo soles (3,858 USD) for Agrotourism Association members. This amount does not include workshop tips and purchases, nor does it include unscheduled visits due to on the ground itinerary changes.• 8 out of 14 Association member households depend on Intrepid for 75% or more of tourism income; remaining members depend on Intrepid for 50% or less of tourism income• 3 out of 14 Association member households depend on tourism for 50% or more of annual income; remaining members depend on tourism for 35% or less of annual income• Local perspectives on tourism-based impacts/changes:<ul style="list-style-type: none">○ “Working in our fields, we were able to survive. With tourism, we have been able to improve.”○ “I used to dedicate myself to making ceramics, washing clothes, working the fields for eight hours a day. But now things have changed a lot because I have my own tourism business.”
Socio-cultural impacts	<ul style="list-style-type: none">• Local perspectives on tourism-based impacts/changes:<ul style="list-style-type: none">○ Increased independence for women, who used to conform to husbands’ work○ Increased connections and awareness of what tourism is○ Conflict between Agrotourism Association members who live farther back in the town and those who are closer to the main drag; individualization → unequal distribution of benefits• Commentary/quotes related to this theme:<ul style="list-style-type: none">○ “One benefit of tourism is that wives no longer depend on their husbands; they have their own source of income. Not much, but it helps and gives the women more responsibility.”○ “We didn’t know about tourism before and thought that it only took place in large hotels and restaurants, and that it only came to Machu Picchu.”
Environmental impacts	<ul style="list-style-type: none">• Minimal• Environmental impacts resulting primarily from construction/growth (cutting down trees or clearing fields to build new homes)
Quality of life impacts	<ul style="list-style-type: none">• Local perspectives on tourism-based impacts/changes:<ul style="list-style-type: none">○ Quality of life increased○ Improvements in homes over last five years, as tourism dollars are used little by little to improve kitchens, dining areas, bathrooms, bedrooms○ Increased ability to provide medicine, clothing, food, education through economic support of tourism• Commentary/quotes related to this theme:<ul style="list-style-type: none">○ “We have achieved a quality of life to improve the health of each member of our family.”○ “My home was hardly normal before tourism – almost extreme poverty.”○ “My living situation wasn’t that great before; it’s better with the tourists.”○ “Tourism improves my way of life at home with my family.”○ “I never thought that tourists would visit this community or the people here because we were poor and didn’t have adequate services/amenities to provide hospitality for visitors. I say poor because we didn’t have

work in our low economy before tourism. Actually, what I mean to say is that tourism has helped us improve the quality of life for us, our kids, and for the future. Our lives haven't changed all at once but little by little, because habit had caused us to think that it was normal to live as we had been doing.”

IV. Recommendations

- | | |
|--|---|
| For Agrotourism Association of Chichubamba | <ul style="list-style-type: none"> • Purpose – Association members should create a vision/mission statement and list of services to improve business negotiations, clarity of purpose, and overall Association unity • Lunch benefits – cook for a single ‘purse’ and divide equally among Association members • Workshop benefits – develop a system of compromise that rewards workshop innovation/investment while supporting Association and community members in need • Communication/Visibility – members of the community should be regularly informed of Association plans and policies, and the Association should direct funds to support community interests (e.g., hosting a <i>Navidad para Ninos</i>, in which children are invited at Christmas time to enjoy a cup of hot chocolate and a piece of bread) • President – should be more focused on tourism and the Association; perhaps partially supported financially through Association funds? Should also be like a ‘mother’ for Association members – “dividing pieces of the potato equally among her children” • Promotion – Association funds should be directed toward purposeful partnerships/advertising |
| For Intrepid (Cuzco office) | <ul style="list-style-type: none"> • Guides – should be made aware that by requesting/demanding specific lunch venues, the Association President is pressured to go against member policy to disperse lunch benefits equally, creating conflict. However, guides can continue requesting specific workshops. • Programming/Scheduling – having a schedule ready for the Association at the end of each month for the upcoming month will help reduce conflict among Association members tremendously. E-mailing this schedule to the Association President will save time and money required to make the trip to Cuzco to pick it up. • Communication – the Association finds it difficult communicating with the Cuzco office, as Norma can be very busy at times. Perhaps there could be a second individual in the office with whom Association members can communicate if necessary (public relations specialist, of sorts?). • Visits/Prices – the Agrotourism Association is overwhelmingly in favor of receiving more visitors (they want more tourism), but as food prices have soared in recent years (Quinoa, especially), they wonder if a price of 20 soles for lunch instead of 15 would be agreeable. Or, perhaps the Association could be paid for the workshops/activities they offer, since visitors don't always purchase products. It was suggested that visitors pay whatever they feel like paying for each workshop, as a tip or direct payment, and that guides be responsible for communicating this. |

V. Reflections/Modifications for Community #2: Amaru

Translator/ Research assistant	Unlike in Chichubamba, I will have a Quechua Translator in Amaru and Qorqor. David Hanco is currently completing his master's degree in Community-Based Tourism and will also act as a Research Assistant for these remaining communities. He has worked extensively with NGOs in the Sacred Valley, as well as for the Ministry of Tourism in Cuzco. Having him with me should support efforts to establish rapport in each community and should allow for more intimate/in-depth conversations (conversing in Quechua may have enriched findings in Chichubamba, as it is the native tongue of majority of the adult population there). I anticipate that David will be extremely helpful as a fully invested member of the research team in collecting/analyzing/summarizing data, and in reporting findings to both Intrepid and the communities.
Clarity and Consensus	In Chichubamba, the Agrotourism Association was comprised of members from different towns/backgrounds, and reaching consensus as to Association interests/needs was difficult. To better support community interests related to tourism in Amaru, I hope to identify these interests more clearly through dialogue among community members early on (e.g., during forum-type brainstorming sessions). This will support efforts to better align research methods and analyses with local needs, hopefully leading to findings that support a more sustainable Intrepid-Amaru partnership.
Seasonal fluctuation	Agrotourism Association records from Chichubamba were analyzed to explore tourism season (March-October) trends between 2010 and 2012. However, questions regarding changes in dependence on tourism between high and low seasons were not explored. I will seek to return to Chichubamba in the coming weeks to retrieve this information, and will also be sure to explore this issue of seasonality in greater depth while working in both Amaru and Qorqor.

Photos of Chichubamba









Many thanks to the Agrotourism Association, Chichubamba for giving us such a beautiful experience in your community!

-David y David

APPENDIX III

INTREPID TRAVEL

Community-Based Tourism Research Briefing

Amaru, Perú

David Warner Knight and Nilo David Hanco Chauca
11/2/2013



The heads of Amaru's Committee of Women offer a warm welcome for soon-to-arrive Intrepid visitors.

I. Overview

Location	Amaru (altitude of 3,800 meters; Pisac district, 1.5 hours from Cuzco by car)
Households (2013)	~250
Population (2004)	1010
Research period	September 2 – October 4, 2013
Primary livelihoods	Agriculture (corn, potato, quinoa, straw grass, fava beans), animal husbandry (chicken, sheep, pigs, cattle, Guinea pigs, donkeys, honeybees), public works/construction, transportation, merchandising, traditional weaving/crafts, tourism (~70 associates in four associations).
Avg. income/month	Men ~319 soles (118 USD), women ~80 soles (30 USD; values based on Tourism Association member questionnaire responses), compared to ~583 soles (210 USD) for residents of Pisac in general (based on the Proposed Plan of Territorial Conditioning, 2011)
Primary investigators	David W. Knight y Nilo David Hanco Chauca
Research team	Ongoing discussions regarding research questions and findings with members of the Committee of Women Association and the community according to availability and interest
Tourism Association	12 members (2 men, 10 women); created in 2008; receiving Intrepid groups since 2010

II. Research Info and Methods

Participatory approach	Responsible research prioritizes local interests and ways of knowing when addressing research questions and objectives. In Amaru, Committee of Women Association members were brought together in 2 separate forums to explore and address issues of importance for them. Every effort has been and will be made to incorporate local involvement and feedback into methods, analyses, and reporting.
Observations/ field notes	Included observations of Intrepid lunch visits (2), artesian markets (3), Association meetings (2), festivals (1), and general community context (politics, culture, economy, society). Incorporated demographic and tourism information gathered from government and Intrepid reports and from interviews with the mayor of Pisac, other government officials, and members of the four tourism associations in Amaru.
Semi-structured interviews	Number interviewed: 29 (11 men, 18 women). 10 members of the Committee of Women Association, 4 from other associations, 12 individuals who don't work in tourism, and 3 Intrepid tour leaders. Questions asked explored community assets, perceived tourism benefits/impacts, reasons for tourism involvement (or not), personal/community needs, changes in quality of life through tourism, ways to improve Intrepid trips, perspectives on 'poverty', etc. Individuals interviewed were from geographically diverse locations throughout Amaru.
Questionnaires	Based on observations, notes, and interviews, 9 questionnaires were created and given to Committee of Women Association members requesting suggestions for the Association and for Intrepid, basic demographics, information on tourism income and its use, etc.
Basic Value Chain Analysis	Involved social mapping process (creating a map to understand where tourism occurs, who is involved, who isn't, linkages between Committee of Women Association members, etc.), and analyzed data from participatory sessions, observations, interviews, and questionnaires to 1) explore how Intrepid trips may be impacting 'the poor', 2) identify local interests with respect to tourism in their

community, and 3) compile a list of recommendations focused on improving the quality of life in the community.

III. Initial Findings

Economic impacts	<ul style="list-style-type: none"> • From August 2012 through July 2013, the Committee of Women Association received approximately 350 Intrepid visitors. Intrepid groups don't visit Amaru during the wet season months of January through March. Visits generated gross tourism revenues of an estimated 7,250 nuevo soles (2,636 USD) from both food preparation (15 soles or 5 USD per visitor) and monthly craft sales (200 soles or 72 USD). • In a normal month with four Intrepid visits, the average income per associate as a result of food preparation and craft sales was reported to be 54 nuevo soles (19 USD). • The Association works only with Intrepid; as such, associates depend nearly 100% on Intrepid visits for their tourism-generated income. • Associates reported that, on average, 29% of their monthly income during the tourism season (April through December) comes from tourism. • Local perspectives on tourism-based impacts/changes: <ul style="list-style-type: none"> ○ Intrepid visits lead to economic benefits for associates but not for community members who don't work in tourism. ○ "Tourism <i>is</i> the livelihood of the home." ○ "Cooking lunch for visitors brings us cash." ○ "In one sense it would be good for more tourists to come to Amaru, but this would only be positive for the people working in tourism directly. The problem is that in reality tourism wouldn't be for everyone. One or two thousand visitors might visit Amaru each day, but that would only be for the association. If the visitors come to my house, it would be for me, for my people, and no one else. That's it."
Socio-cultural impacts	<ul style="list-style-type: none"> • Local perspectives on tourism-based impacts/changes: <ul style="list-style-type: none"> ○ Increase in the autonomy of women, who used to conform only to the work of their husbands. ○ Cultural recuperation. ○ Arguments with and jealousy among other associations and people who don't work in tourism. ○ Demotivation among associates as a result of cancelled Intrepid visits. • Commentary/quotes related to this theme: <ul style="list-style-type: none"> ○ "Before we (women) would look at the face of our husbands and ask for money. But now, with tourism, we can generate our own income." ○ "The benefits of tourism for us are, more than anything, for the women. We defend ourselves now and with the tourists, well, we can earn something. Before, women only worked in the kitchen, or washing clothes." ○ "We feel sad when visits are cancelled." ○ "Through the activity of tourism, we put on our traditional clothing and are able to recover our cultural identity."
Quality of life impacts	<ul style="list-style-type: none"> • Local perspectives on tourism-based impacts/changes: <ul style="list-style-type: none"> ○ Psychological empowerment for associates who receive Intrepid groups. ○ Positive influence in the quality/way of life for those who participate in tourism and for those who do not, especially in relation to the cleanliness

- of the community and the improvement of homes/living situations.
- Commentary/quotes related to this theme:
 - “We are being woken up with tourism, and we are moving forward. In the community before, without tourism, we didn’t think anything.”
 - “We feel very proud and happy when we receive visitors.”
 - “Regarding the way of life of the families here, yes it has changed in how the homes have improved. Before, the homes were small, with straw roofs and just one or two rooms. The houses that people who work in tourism have now, they didn’t have before. There was more poverty.”
 - “Before, we lived with a lot of sadness; our homes were really small. But now, with tourism, we improve our homes.”
 - “...those of us who don’t work in tourism have improved our houses, too, upon seeing the changes in the other families.”

IV. Recommendations

For the Committee of Women, Amaru

- **Organization** – Begin keeping a notebook in order to write reflections and to have a record of each visit; consider creating a list of questions that could be asked of visitors to help improve their experience in Amaru; think about how more than one group of visitors might be served on the same day, should tourism numbers increase to that extent in the coming years
- **Activities** – Brainstorm potential activities that visitors might experience when visiting the community; would there be any products sold besides traditional weaves as part of those activities?
- **Explaining of traditional weaves** – Material *and* labor costs of creating each weave should always be shared with visitors; it is important that visitors know about not only the *process* used to make the products, but how much *time* it takes (~30 days for one wrap)
- **Communication** – Associates must be sure to communicate with Intrepid trip leaders one day prior to each visit; being sure that cell phones are accessible and understanding how to send/receive e-mails are necessary elements of improved communication efforts between Intrepid and the Association
- **Services** – Continue thinking about how to improve overall cleanliness/hygiene in food preparation; fix shower so that hot water is available for overnight visitors
- **Advertising** – Association funds should be allotted to continue developing strategic partnerships with local government, tourism businesses, NGOs, etc.

For Intrepid/ PEAK

- **Leaders** – During an eight week time frame in which we have been communicating with and visiting Amaru, only four Intrepid groups arrived out of the eight that were scheduled; group leaders should be reminded that visits to Amaru and similar communities are not optional but required elements of the scheduled itinerary for which visitors have paid
- **Itinerary** – Associates should be reminded that while visits to each community are required, lunches are optional; they should be reminded also that while visits are required elements of itineraries, there are certain conditions under which Intrepid groups will not be able to arrive (inclement weather, sick passengers, and missed flights are the most common causes of cancelled visits)

- **Communication** – The Intrepid/PEAK office in Cuzco should reinstate the position for a Responsible Travel manager/coordinator in order to maintain/improve relationships with each community and to facilitate ongoing communication with associations
- **Visits/Prices** – The Committee of Women Association is strongly in favor of receiving more visitors and seeing an increase in tourism to Amaru; also, with recent increases in the price of food, we suggest that visitors begin paying 20 nuevo soles (~7 USD) for lunch rather than 15 (~5 USD); some guides have begun to tell their group to pay 20 soles anyway, even though the Association only charges 15

V. Reflections/Modifications for Community #4: Qorqor

Trueque (Exchange)	When interviewing individuals in each community, we have become keenly aware of the importance of offering community members something in exchange for the time they spend with us. In Amaru and Sacaca, we have begun to offer something to those interviewed for the information they provide (a beer, a pen, sticky notes, photos, candy for the kids, etc.). It's never something exceedingly grand or expensive, but rather a simple, heartfelt token of our appreciation. We plan on continuing this customary practice of 'trueque' in our fourth and final community, Qorqor, to establish positive relationships from the start with each individual interviewed.
Potential Intrepid Foundation projects	As current Intrepid Foundation support of projects/NGOs in the region is soon to end, we will be looking for new projects/NGOs with which partnerships might be established in the coming year(s). Our focus will be on locally 'owned' and operated institutions that have an established track record in supporting development and poverty alleviation efforts in Peru. Health- or education-related projects will be given special attention, and recommendations will be made to Intrepid/PEAK in the coming weeks.
Observing visiting groups	The tourism association in Qorqor has mentioned already that they currently work with three travel agencies/operators and receive visitors four times per week. This should provide us with opportunities to observe not only visiting Intrepid groups (twice a week during the high season), but also to observe and compare how other travel companies operate in the community. During the next month, we will be making several return trips to Sacaca to observe Intrepid visits there, as well, since we have yet to see Intrepid groups in Sacaca. Through the group visits we observe in Qorqor and Sacaca, we anticipate being able to make useful comparisons/recommendations for Intrepid and communities on Sat., Nov. 30. when we hold our workshop for the four communities with which we've been working.

Photos of Amaru



The Casa de Hospedaje became a home away from home for researchers David and David during their stay in Amaru.



Always looking for ways to stay warm – with seven blankets by night and martial arts exercises by day!



In order to get to know the people of Amaru and to learn about community-based tourism there, it was necessary to work the fields with locals and scale the steep slopes of the community.



A friend plays his drum to celebrate during a communal fiesta in Amaru.



The food offered to the researchers at the Casa de Hospedaje was excellent!



Associates of the Committee of Women, Amaru, gathered together for three hours to prepare lunch for an Intrepid group that was soon to arrive.



Intrepid groups are offered a warm welcome with wreathes of bell flowers upon arrival.



Elaboration on traditional weaving practices in Amaru captivates Intrepid visitors.



After eating lunch and purchasing some products, the visitors receive a heartfelt goodbye from members of the tourism association.

Many thanks to the Committee of Women, Amaru for giving us such a beautiful experience in your community!

-David y David

APPENDIX IV

INTREPID TRAVEL

Community-Based Tourism Research Briefing

Sacaca, Perú

David Warner Knight and Nilo David Hanco Chauca

12/24/2013



The community of Sacaca affords visitors breathtaking views of the Sacred Valley in the distance.

I. Overview

Location	Sacaca (altitude of 3,450 meters; 1.5 hours from Cuzco by car)
Households (2013)	160 familias
Population (2004)	655
Research period	September 16 – October 15, 2013
Primary livelihoods	Agriculture (corn, potato, quinoa, straw grass, wheat, other vegetables), animal husbandry (chicken, sheep, cattle, Guinea pig, donkeys, honeybees), public works, transportation, traditional textiles/weaving, merchandising, tourism (70% of men have worked as porters on the Inca Trail)
Avg. income/month	Men: ~608 soles (225 USD), women: ~148 soles (55 USD; values based on Tourism Association member questionnaire responses), compared to ~583 soles (210 USD) for residents of Pisac in general (based on the Proposed Plan of Territorial Conditioning, 2011)
Primary investigators	David W. Knight and Nilo David Hanco Chauca
Research team	Ongoing discussions regarding research questions and findings with members of the Sumaq Warmi Association and the community according to availability and interest
Tourism Association	12 members (3 men, 9 women); created in 2012; receiving Intrepid groups since 2010

II. Research Info and Methods

Participatory approach	Responsible research prioritizes local interests and ways of knowing when addressing research questions and objectives. In Sacaca, Sumaq Warmi Association members were brought together in 3 forums to explore and address issues of importance for them. Every effort has been and will be made to incorporate local involvement and feedback into methods, analyses, and reporting.
Observations/field notes	Included observations of one Intrepid lunch visit, artisanal markets (2), a Potato Park meeting, one Association meeting, planting in the fields, and general community context (politics, culture, economy, society). Incorporated demographic and tourism information gathered from government and Intrepid reports and from interviews with the mayor of Pisac, other government officials, and members of the one other association (textiles/weaving) in Sacaca.
Semi-structured interviews	Number interviewed: 34 (15 men, 19 women). 10 members of the Sumaq Warmi Association, 21 who don't participate in tourism, and 3 Intrepid leaders. Questions asked explored community assets, perceived tourism benefits/impacts, reasons for tourism involvement (or not), personal/community needs, changes in quality of life through tourism, ways to improve Intrepid trips, perspectives on 'poverty', etc. Individuals interviewed were from geographically diverse locations throughout Sacaca.
Questionnaires	Based on observations, notes, and interviews, 9 questionnaires were given to Sumaq Warmi Association members requesting suggestions for the Association and for Intrepid, basic demographics, information on tourism income and its use, etc.
Basic Value Chain Analysis	Involved social mapping process (creating a map to understand where tourism occurs, who is involved, who isn't, linkages between Sumaq Warmi Association members, etc.), and analyzed data from participatory sessions, observations, interviews, and questionnaires to 1) explore how Intrepid trips may be impacting 'the poor', 2) identify local interests with respect to tourism in their community, and 3) compile a list of recommendations focused on improving the quality of life in the community.

III. Initial Findings

Economic impacts	<ul style="list-style-type: none">• In 2012, the Sumaq Warmi Association received 526 Intrepid visitors, generating 7,890 soles (2,838 USD) from serving lunch at 15 soles/visitor (5.40 USD). In 2013, according to the Association, the number of Intrepid visitors to Sacaca dropped by 90% to 55 for the entire year (an average of about 1 group visit per month for 9 months, with ~6 passengers per group).• If Intrepid groups were to visit 4 times per month (as occurred in 2012), Sumaq Warmi Association members estimated that their tourism income would be ~63 soles/month. This includes income through both the lunches served and textile sales.• The Association works only with Intrepid; as such, associates depend nearly 100% on Intrepid visits for their tourism-generated income.• Associates reported that, on average, 17% of their monthly income during the tourism season (April through December) comes from tourism.• Commentary/quotes related to this theme:<ul style="list-style-type: none">○ “In 1960, there wasn’t money, there wasn’t work. These days, what do we have? Just the Inca Trail. That’s the only hope for country folk. At least I have a little store to be able to survive; but many people here don’t have anything.”○ “Before tourism, the women stayed at home without any work. Now, Intrepid groups come and the women can earn something. They can survive the economic crisis.”○ “What is needed here is capital, so that we can increase the quantity and quality of our (agricultural and artesanal) products.”
Socio-cultural impacts	<ul style="list-style-type: none">• Local perspectives on tourism-based impacts/changes:<ul style="list-style-type: none">○ Recuperation and revaluing of traditional textiles and clothing among those who work in tourism○ Social division at the community-level• Commentary/quotes related to this theme:<ul style="list-style-type: none">○ “Through tourism, we transmit our living culture that we carry in our blood.”○ “We want to support our community through tourism, but how would you support your community if they turned their back on you and said, “We don’t have time to work with any of you.”?”○ “Thanks to Living Hearts, I learned how to weave like my parents and grandparents used to do. I didn’t know how to weave before.”○ “...kids from the elementary school here have begun to clothe themselves with synthetic clothes that they see the tourists wearing. They’ve stopped using the traditional clothes that they used to wear.”○ “I’m not ashamed of wearing traditional clothing. Globalization should not cause the customs and traditions of the Andean people to be lost, and young people should not forget their origins, nor ever forget nor leave behind their cultural identity.”
Quality of life impacts	<ul style="list-style-type: none">• Local perspectives on tourism-based impacts/changes:<ul style="list-style-type: none">○ More happiness, respect, awareness among those who work in tourism○ Rural/community-based tourism has brought benefits at the family-level in Sacaca for those involved, but the Inca Trail has brought benefits at both the community and family-levels (home improvement, cleanliness, awareness, etc.)• Commentary/quotes related to this theme:<ul style="list-style-type: none">○ “We are happier and more content with tourism. It’s good to be able to have exchanges – to share ideas and culture – and to get to know the visitors.”

- “We don’t have luxuries, but we have food to eat. With tourism, we receive income – an economic support – and we are able to improve our quality of life.”
- “The fruits of tourism (Intrepid visits) haven’t been seen in Sacaca yet.”
- “We didn’t have homes nor cattle before, but thanks to tourism (the Inca Trail), we have improved.”
- “By working on the Inca Trail (as porters), we’ve been able to learn how to cook, how to be cleaner, how to respect our neighbor, and also what other countries are like by having a type of interchange of ideas.”

IV. Recommendations

For the Sumaq Warmi Association	<ul style="list-style-type: none"> ● Unity/Aliances – We recommend that the Sumaq Warmi Association seek to strengthen/restore its relationships and aliances with other institutions in their community and region, including with the Panty Pally Association of Sacaca, with the Potato Park, and with other tourism Associations in neighboring Amaru. ● Vision – In the coming years, a focus should be placed on developing and managing well the restaurant they’ve built before beginning to build a second restaurant nearby ● Issue of activities – Decide more clearly what activities will be done to provide visitors with educational, hands-on, real-life experiences; also, think about how those activities might generate additional income through product sales (as with the workshops in Chichubamba, for example) ● Communication – It’s necessary for Association leaders to be sure to connect with Intrepid leaders at least one day before scheduled groups arrive; 2 cell phones may be necessary to ensure communication is possible; learning how to use e-mail to be able to better communicate with travel companies is recommended, also ● Services – Build rooms to be able to house overnight visitors (with beds, mattresses, blankets, bathrooms, hot water, etc.); continue to think in how to improve hygiene and cleanliness with respect to food preparation ● Promotion/advertising – Association funds should be allotted to continue developing strategic partnerships with local government, tourism businesses, NGOs, etc.
For PEAK/ Intrepid	<ul style="list-style-type: none"> ● Support – We recommend that the Intrepid Foundation considers continuing its support of the Living Hearts NGO, because this organization has already established a good relationship with Sacaca and has worked in the community over the years; but there are still opportunities to support the people of Sacaca (building homes for widows, helping families with kids with severe/special needs, etc.) ● Trainings – Work with the municipality of nearby Pisac or other institutions to offer workshops or presentations to Sumaq Warmi associates; workshops or trainings might concern food preparation, visitor safety, restaurant/business management (documentation, accounting, etc.), internet use, or English ● Communication – Create a position in the Cuzco office to improve relationships with Sacaca and to facilitate ongoing communication with Sumaq Warmi associates; the Responsible Travel Coordinator should be made a full-time position focusing on these items ● Visits/Prices – The Sumaq Warmi Association is strongly in favor of receiving more visitors and seeing an increase in tourism to Sacaca; also, with recent increases in the price of food, we suggest that visitors begin paying 20 nuevo soles (~7 USD) for lunch rather than 15 (~5 USD); some guides have begun to tell their group to pay 20 soles anyway, even though the Association only charges 15

Photos of Sacaca



The Sumaq Warmi Association provides a warm welcome for visitors – and for newly named Godfathers!.



Enjoying the incredibly beautiful and mountainous landscape of Sacaca with friends...



Getting ready to plant some corn and fava beans in the field.



Our precious Goddaughter smiles for the camera while she helping mom in the kitchen.



The food served by the Sumaq Warmi Association is incredible – ‘sumaq’ (delicious) without a doubt!

Many thanks to the Sumaq Warmi Association of Sacaca for giving us such a beautiful experience in your community!

-David y David

APPENDIX V

INTREPID TRAVEL

Community-Based Tourism Research Briefing

Qorqor, Perú

David Warner Knight and Nilo David Hanco Chauca
1/13/2014



Nilo and a friend lighten the mood with a few songs on their flutes while lunch is being prepared in the background.

I. Overview

Location	Qorqor (altitude of 3,900 meters; 1 hour from Cuzco by car)
Households (2013)	48 families
Population (estimate)	~200
Research period	November 3 through December 3, 2013
Primary livelihoods	Agriculture (potato, quinoa, straw grass, wheat, other vegetables), animal husbandry (chicken, sheep, cattle, Guinea pig, donkeys), public works, transportation, traditional textiles/weaving, merchandising, tourism
Avg. income/month	Men: ~362 soles (134 USD), women: ~108 soles (40 USD; values based on Tourism Association member survey responses); compared to 583 soles (210 USD) for residents of Chinchero in general (based on the Proposed Plan of Territorial Conditioning, 2011)
Primary investigators	David W. Knight and Nilo David Hanco Chaucca
Research team	Ongoing discussions regarding research questions and findings with members of the Munay Ttica Association and the community according to availability and interest
Tourism Association	24 members (2 men, 22 women); created in 2013; receiving Intrepid groups since 2013

II. Research Info and Methods

Participatory approach	Responsible research prioritizes local interests and ways of knowing when addressing research questions and objectives. In Qorqor, the Munay Ttica Association members were brought together in 3 forums to explore and address issues of importance for them. One of these meetings was comprised of associates, spouses, and children (48 individuals in total) who discussed community interests for nearly three hours, circled up outside on a cold night. Continual effort will be made to incorporate local involvement and feedback into methods, analyses, and reporting.
Observations/field notes	Included observations of 5 Intrepid lunch visits (4 were canceled during period of research), one government-led workshop on traditional weaving/dyes, two Association meetings, tending fields/feeding livestock, visits to surrounding villages, and general community context (politics, culture, economy, society). Incorporated demographic and tourism information gathered from government and Intrepid reports and from interviews with government officials and members of the one other tourism association in Qorqor.
Semi-structured interviews	Number interviewed: 27 (14 men, 13 women). 13 members of the Munay Ttica Association, 5 who don't participate in tourism, 5 from the other tourism association in Qorqor, the Promoter of Tourism from the municipal government in Chinchero, and 3 Intrepid leaders. Questions asked explored community assets, perceived tourism benefits/impacts, reasons for tourism involvement (or not), personal/community needs, changes in quality of life through tourism, ways to improve Intrepid trips, perspectives on 'poverty', etc. Individuals interviewed were from geographically diverse locations throughout Qorqor.
Questionnaires	Based on observations, notes, and interviews, 22 questionnaires were given to Munay Ttica Association members requesting suggestions for the Association and for Intrepid, basic demographics, information on tourism income and its use, etc.
Basic Value Chain Analysis	Involved social mapping process (creating a map to understand where tourism occurs, who is involved, who isn't, linkages between Munay Ttica Association members, etc.), and analyzed data from participatory sessions, observations, interviews, and

questionnaires to 1) explore how Intrepid trips may be impacting ‘the poor’, 2) identify local interests with respect to tourism in their community, and 3) compile a list of recommendations focused on improving the quality of life in the community.

III. Initial Findings

Economic impacts	<ul style="list-style-type: none"> • In 2013, the Munay Ttica Association received ~515 Intrepid visitors, generating 11,400 soles (4,101 USD) from serving lunch which was originally priced at 15 soles/visitor (5.40 USD; January through June) but rose to 25 soles/visitor (9 USD) beginning in July. • Monthly income per associate from Intrepid visits was reported to be an average of 40 soles (14.40 USD). This includes income through both lunch and craft sales. One reason this amount is lower than average monthly income in other associations may be due to the size of the Munay Ttica Association (i.e., lunch revenues are divided equally among 24 associates rather than among 12 associates as in, say, Amaru). • The Association works primarily with Intrepid, but also occasionally with a community-based tourism company known as Responsible Travel Peru. Still, associates depend nearly 100% on Intrepid visits for their tourism-generated income. • Associates reported that, on average, 23% of their monthly income in 2013 came from tourism. • Commentary/quotes related to this theme: <ul style="list-style-type: none"> ○ “Our worry is that, here, there is no economy.” ○ “We have very little economically now, but we can earn more through tourism in order to educate our kids. All of us are thinking about this.” ○ “The women continue to participate in tourism even though they don’t earn much. This is because we have only just begun, and we have to invest and to learn before we can earn more.”
Socio-cultural impacts	<ul style="list-style-type: none"> • Local perspectives on tourism-based impacts/changes: <ul style="list-style-type: none"> ○ Greater religious tolerance and unity within the Munay Ttica Association as a result of tourism ○ Increase in the speed of daily life for those working in tourism ○ Social division more prevalent at the community level as a result of tourism • Commentary/quotes related to this theme: <ul style="list-style-type: none"> ○ “When we began to receive Intrepid groups, there was disrespect/jealousy between Christians and Catholics because the Christians didn’t dance nor clap with the visitors. But things have changed, and now we all dance and enjoy ourselves.” ○ “Before, we lived and did everything more slowly. We cared for our animals, we walked in the fields. Now, when the groups come, we have to move quickly, getting up earlier. We comb our hair, we bathe, and we move fast to tend to the visitors.” ○ “I participated in tourism before, but my husband didn’t want me to continue because I didn’t have the time. But now I want to participate again.” ○ “When you two (Nilo and David) go to interview members of the other tourism association, don’t teach them anything about what we do in our

	<ul style="list-style-type: none"> ○ association. They wanted to undo us, but they weren't able to.” ○ “It's more convenient to work in smaller (associations), because larger groups always have problems as a result of having less understanding, less unity, and more jealousy.”
Quality of life impacts	<ul style="list-style-type: none"> ● Local perspectives on tourism-based impacts/changes: <ul style="list-style-type: none"> ○ There remains a lack of knowledge/awareness (human capital) related to the business of tourism (working with agencies/government, advertising, accounting, etc.) ○ Through involvement in tourism, associates have learned how to sell their traditional weaves and hope to improve their homes and educate their kids ○ Income and cleanliness (at the household and community levels) are two of the tourism benefits most recognized and acknowledged in Qorqor ○ Social economy is key – many associates make less income than they could elsewhere (in the fields, for example), but they are happier when they gather together with their friends to receive visitors than if they were to stay at home ● Commentary/quotes related to this theme: <ul style="list-style-type: none"> ○ “The families of my Association aren't interested in improving their homes nor in working in tourism because they don't know how to yet.” ○ “I am nothing, from nothing. I'm just a farmer. But I want my kids to become something more, for them to learn more...Tourism will help us achieve that.” ○ “We're going to build a room for visitors in our home...Now, we have very little, but with tourism we can increase, bit by bit.” ○ “Before, there weren't any plants here, but now there are. Qorqor is cleaner now, too. We have trash bins in our homes.” ○ “Thanks to the tourists who come, we've received an income and have cleaned our houses and community. If tourists didn't come, we'd be the same as our parents. We'd be living with our animals and fields only.” ○ “Now I don't work as often in the fields. I come here to sell [my weaves], and I earn less. But I come here anyway because I am happier spending time with my friends.”

IV. Recommendations

For the Munay Ttica Association	<p>Universal use of the community locale – We recommend that Munay Ttica allows the other tourism association in Qorqor to also use the community center rather than keeping it for their personal use.</p> <p>Selling of traditional weaves – Some associates have more experience than others with selling their products. These individuals want to be able to sell their products to every group of visitors that comes through, but we recommend that not all 24 associates sell during each visit. Instead, the number selling should be in proportion to the number of visitors who've come. This may help tourists feel less overwhelmed and obligated to buy and the associates less discouraged when they don't make a sale.</p> <p>Activities – Think about which activities might provide visitors with a more educational and real-life experience. Also, is there a way to make money by providing alternative activities? For example, visitors might learn about fava beans – harvesting them, grinding them into powder, cooking them, making/purchasing a tasty fava beverage with an option to buy packets of powder for the road.</p> <p>Organization – In order to improve communication between Intrepid leaders and</p>
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passengers, the Association should think about how it might classify/organize the activities offered to visitors. Activities might be grouped by different themes like agriculture (planting, etc.), food (helping cook lunch, etc.), culture (traditional dances, etc.), and the history of the community/region.

Promotion/advertising – Association funds should be allotted to continue developing strategic partnerships with local government in Chinchero, tourism businesses, NGOs, etc.

For PEAK/
Intrepid

Training – We recommend that Intrepid provide several workshops for Munay Ttica members on the topic of food preparation and service (this has yet to be done in Qorqor as it has with other communities).

Skill development – Munay Ttica associates are interested in learning English, how to use e-mail/technology, and basic business skills (how to partner with agencies, travel companies, various institutions, etc.). Intrepid could support them in achieving these goals.

Responsible travel coordinator – It's important to create an official and full-time position in the Cuzco office that will focus entirely on facilitating and maintaining communication between Qorqor and Intrepid, with the other communities, and with other potential business partners/institutions.

Communities – We recommend that Intrepid decide on specific communities with whom to work (3 or 4) in the Sacred Valley, and that every effort be made to develop and establish long-term relationships with those communities. For valid reasons, Intrepid has left 2 Sacred Valley communities in recent years and moved on to others. As future problems arise with the communities Intrepid selects, there should be a specific process by which Intrepid offers ideas, support, and suggestions to the community under question. Intrepid employees as well as community members should be aware of what these processes entail, and should trust that difficulties and issues will be addressed and resolved (perhaps during an annual meeting like the one we held with the 4 communities on November 30 of this year).

Participation – It's been suggested that a member of each tourism association from the Sacred Valley communities (and perhaps from other communities visited by Intrepid groups) be invited to meet Intrepid staff and tour leaders during the leader trainings to take place early this year (2014). Tour leaders have mentioned that, in some cases, their knowledge of the communities they visit is painfully scant. Meeting with and hearing from community representatives would help them better understand community interests and histories, which should translate into better-informed visitors and more sustainable partnerships over time.

Photos of Qorqor



Intrepid groups feel the warmth of the Munay Ttica Association and enjoy a phenomenal Andean buffet when visiting Qorqor.



The used for cooking (such as the carrots in this photo) are fresh and natural.



Associates often gather together as much to learn as to enjoy each other's company!



The people of Qorqor are as warm and colorful as the clothes they wear!



Many thanks to the Munay Ttica Association of Qorqor for providing us with so many beautiful experiences in your community!

-David y David

APPENDIX VI

Asociación Munay Ttica

Investigación del Turismo Comunitario

Qorqor, Perú

David Warner Knight y Nilo David Hanco Chauca

13/1/2014



Nilo y un abuelito tocan algunas canciones para divertirse durante la preparación del almuerzo.

1. Visión General

Sitio	Sector de Qorqor (altura a 3.900 metros; 1 hora de Cuzco en carro)
N° de vivencias (2013)	48 familias
Población (estimación)	~200
Epoca de investigación	3 de noviembre a 3 de diciembre, 2013
Sustentos principales	Agricultura (papa, quinoa, cebada, trigo, verduras), manejo de animales (gallina, oveja, ganado, cuy, burro), obras públicas, transporte, tejidos/artesanía, ventas, turismo
Sueldo mensual mediano/cápita	Varones ~362 soles/mes, mujeres ~108 soles/mes (estadísticas basadas en respuestas de la encuesta); en el distrito de Chinchero, el sueldo mensual es 583 soles/mes (estadística basada en la Propuesta de Plan de Acondicionamiento Territorial, 2011)
Investigadores	David W. Knight y Nilo David Hanco Chauca
Equipo investigador	N/A; conversaciones continuas con socios y miembros de la comunidad de Sacaca según disponibilidad e interés (acerca de preguntas y resultados investigadores)
La Asociación	24 miembros (2 varones, 22 mujeres); creada en 2013; vinculación con Intrepid desde 2013
Número de entrevistados	27 (14 varones, 13 mujeres). 13 miembros de la Asociación Munay Ttica, 5 que no participan en el turismo, 5 de la otra asociación de turismo, 1 promotor de turismo de Chinchero, y 3 líderes de Intrepid

2. Resultados Iniciales

Temas económicos	<ul style="list-style-type: none">• En el año 2013, la Asociación Munay Ttica atendió a ~515 visitantes de Intrepid, generando ingresos de los almuerzos servidos a aproximadamente S/ 11.400 (\$4.101). La Asociación cobro 15 soles por visitante entre enero y junio, pero el precio del almuerzo subió a 25 soles por persona en julio.• El ingreso por socio a través de las visitas de Intrepid es un promedio de S/ 40 al mes, que incluye ingresos a través de la preparación de la comida y de la venta de artesanía. Este numero es mas bajo que en otras comunidades por que el ingreso a través de los almuerzos se reparte equitativamente entre 24 socios (las otras asociaciones tienen menos miembros).• La Asociación recibe visitas primariamente de Intrepid, pero también de una empresa que se llama Responsible Travel Peru. Depende de Intrepid para casi 100% de su ingreso turístico.• Socios reportaron que dependen del turismo para un promedio de 23% de su ingreso mensual familiar.• Comentarios/dichos acerca de este tema:<ul style="list-style-type: none">○ “Ahora tenemos muy poco económicamente, pero queremos ganar mas a través del turismo para educar a nuestros hijos. Todos estamos pensando eso.”○ “Nuestra preocupación es que no hay economía acá.”○ “Las señoras siguen participando en el turismo aunque no ganan mucho, porque recién estamos empezando y tenemos que invertir y aprender antes de ganar mas.”
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- Temas sociales
- Impactos/cambios:
 - Mas entendimiento y unidad religiosa al nivel de la Asociación a través del turismo
 - La velocidad de las rutinas cotidianas ha aumentado para los que trabajan en el turismo
 - División social/general aumentada por el turismo al nivel comunitario
 - Comentarios/dichos acerca de este tema:
 - “Al empezar a...recibir grupos de Intrepid, había miramiento entre los cristianos y católicos porque los cristianos no bailaban ni aplaudían con los turistas. Pero eso ya ha cambiado y ahora todos bailamos y disfrutamos.”
 - “Antes vivíamos y hacíamos todo con mas despacio; cuidábamos a los animales, caminamos en el campo. Pero ahora, cuando vienen los grupos, tenemos que movernos con mucha prisa – levantándonos mas temprano...nos peinamos, nos duchamos, y vamos rápido a atender a los turistas.”
 - “Cuando ustedes vayan a entrevistar la otra Asociación, que no les enseñen lo que hacemos nosotros en la nuestra...Ellos querían deshacer nuestra Asociación, pero no pudieron.”
 - “Yo participaba en el turismo antes, pero mi esposo no quería que participara por la falta de tiempo. Pero ahora quiero volver a participar.”
 - “Es mas conveniente trabajar en (Asociaciones) mas pequeñas, porque los grupos grandes siempre tienen problemas a causa de tener menos comprensión, menos unidad, mas miramiento.”
-

- Temas de calidad de vida
- Impactos/cambios:
 - Aun falta conocimiento acerca del turismo y como trabajar con turistas/agencias
 - Socios si han aprendido como vender su artesanía y mejorar sus casas a través del turismo
 - Ingresos y la limpieza familiar/comunal son dos de los beneficios mas reconocidos del turismo en Qorqor
 - Comentarios/dichos acerca de este tema:
 - “No soy nada, de nada. Solo soy agricultor. Pero quiero que mis hijos se hagan algo mas, que aprendan..El turismo nos ayudara a lograr eso.”
 - “Vamos a construir una habitación para turistas en nuestra casa...Ahora, solo tenemos poco, pero con el turismo podemos aumentar, poco a poco.”
 - “Antes, no había ni una planta aquí, pero ahora si. Esta mas limpio ahora en Qorqor, también. Tenemos nuestros basureros en cada casa.”
 - “Las familias de mi Asociación no toman interés en mejorar sus casas ni en trabajar en turismo porque no saben que hacer todavía.”
 - “Gracias a los turistas que han venido, hemos recibido un ingreso y hemos limpiado nuestras casas y comunidad. Si no vinieran los turistas, seríamos iguales a nuestros papas. Estaríamos viviendo con los animales y la chacra solamente.”

3. Recomendaciones

Para la Asociación Munay Ttica	<ul style="list-style-type: none">• Uso del local para todos – Recomendamos que la Asociación Munay Ttica abra el local para que la otra asociación de turismo en Qorqor también pueda usarlo de vez en cuando.• Venta de artesanía – Algunos socios tienen más experiencia con la venta de artesanía. Estos socios quieren poder vender sus productos cada vez que venga un grupo, pero recomendamos que en vez de hacer eso, menos socios deben vender (según el número de visitantes que hayan venido). De esta forma, los turistas se sentirán más cómodos y los socios quedarán menos decepcionados por haber perdido su tiempo sin vender nada.• Cuestión de las actividades – Pensar en qué hacer con visitantes a enseñarles y darles una experiencia real; también pensar en qué se puede vender como parte de tales actividades (por ejemplo, los turistas podrían aprender de las habas – cosechando, moliendo, cocinando, y tomando una haba con leche a 10 soles).• Organización – Para mejorar la comunicación entre los líderes y los pasajeros, la Asociación debe pensar en cómo clasificar las actividades que puede elegir cada grupo. Por ejemplo, se podría clasificar las actividades según temas como la agricultura (plantar, etc.), la gastronomía (ayudar a cocinar, etc.), la cultura (bailes, etc.), y la historia de la comunidad/región.• Promocionar – Fondos de la Asociación deben dirigirse para realizar alianzas estratégicas con la municipalidad de Chinchero, con agencias de turismo, con instituciones (ONGs), etc.
Para Intrepid (la oficina de Cuzco)	<ul style="list-style-type: none">• Entrenamiento – Recomendamos que Intrepid lleve a cabo algunas capacitaciones para la Asociación Munay Ttica acerca del tema de la preparación y servicio de la comida.• Desarrollo – Socios de Munay Ttica tienen interés en aprender cómo hablar el inglés, usar la tecnología, y vincularse mejor con otras agencias, empresas, instituciones, etc. Intrepid puede apoyarlos a los socios para conseguir tales metas de capacitarse.• Coordinador de turismo responsable – Es importante establecer un puesto oficial, formal, y de tiempo completo en la oficina de Cuzco que se enfoca totalmente en facilitar y mantener la comunicación con Qorqor, con las otras comunidades, y con empresas/negocios de la región.• Comunidades – Recomendamos que Intrepid elija un número específico de comunidades en el Valle Sagrado (3 o 4) con que trabajar. Al aparecer problemas/conflictos con una de las comunidades, debe haber un proceso en que tal comunidad reciba ideas/apoyo/sugerencias de Intrepid. Es decir, los empleados de Intrepid tanto como las comunidades deben tener la confianza de que los problemas – al aparecer – serán comunicados y resueltos (quizás a través de una reunión anual como la que tuvimos el 30 de noviembre).• Participación – Se ha sugerido que algún miembro de la Asociación de cada comunidad debe ser invitado al entrenamiento de los líderes de Intrepid para presentarse y hablarles de las Asociaciones. Los líderes han mencionado en ciertos casos que no saben mucho de las historias ni de los intereses de las comunidades; reuniendo con representantes de las comunidades ayudaría resolver esta falta de conocimiento.



¡Gracias a la Asociación Munay Ttica de Qorqor por darnos tantas experiencias tan bellas en su comunidad!

-David y David

Nuestra Experiencia en Qorqor – Un Ensayo Fotográfico



Los grupos de Intrepid sienten la calidez de la Asociación Munay Ttica y disfrutan de una comida muy sabrosa al visitar la comunidad.



Los ingredientes para la comida (como la zanahoria en la foto) son frescos y naturales.



Las socias disfrutan de juntarse tanto para capacitarse como para conversar.



¡La gente de la comunidad de Qorqor esta tan llena de color como la ropa que lleva!

APPENDIX VII

Hola,

Mi nombre es David, soy de Estados Unidos de Norte América, me gusta mucho viajar a nuevos lugares y conocer nuevas personas. Como estudiante de la Universidad Estatal de Colorado también disfruto aprendiendo de nuevas cosas.

He conversado con mis amigos de INTREPID y me ellos me contaron sobre su comunidad. Me contaron que algunos de ustedes trabajan con turistas, además que reciben dinero de los turistas que comen con ustedes, conversan con ustedes, visitan sus casas y aprenden acerca de sus tradiciones y su gente.

Yo quisiera conversar con ustedes acerca de cómo estos turistas han cambiado o ayudado; a ustedes, su comunidad o forma de vida. INTREPID está interesado en saber cómo los turistas han beneficiado su comunidad y si hay preocupaciones o ideas acerca del turismo en su comunidad. Tengo dos preguntas para ustedes:

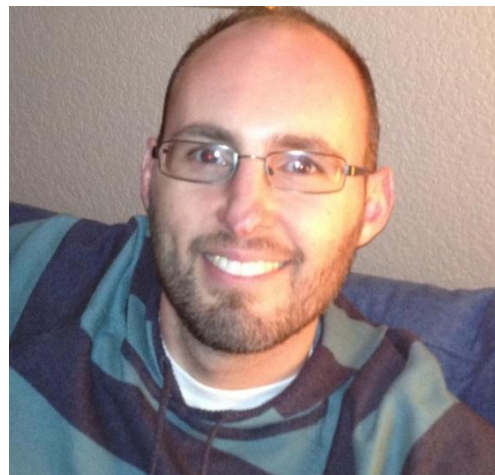
1. **¿ME PERMITIRIAN QUEDARME Y A UN AMIGO PERUANO EN SU COMUNIDAD POR UN MES?** Nosotros pagaríamos por comida y alojamiento. Como yo sólo hablo inglés y español pero no quechua, mi amigo peruano seria mi traductor para apuntar tus pensamientos e ideas acerca del turismo.
2. **¿ESTARIAN DISPUESTOS A COMPARTIR SU IDEAS Y OPINIONES SOBRE EL TURISMO CONMIGO Y MI AMIGO?** Mientras esté en su comunidad, me gustaría hablar con 10 a 25 personas de edades diferentes y preguntarles acerca del turismo. Estas personas no tienen necesariamente que trabajar con los grupos de INTREPID o con el turismo que llega a la comunidad.

Si ustedes están dispuestos a recibirme y a mi amigo, no necesitamos nada especial. Queremos vivir, comer y dormir como ustedes y ayudarlos en lo que sea posible. Ustedes solo díganle a INTREPID su decisión y ellos me la dirán.

Espero tener la oportunidad de conocerlos personalmente algún día, y poder ayudarlos de algún modo, y ayudar a INTREPID a que sepan los intereses y preocupaciones de su comunidad. Muchas Gracias y les deseo mucha salud y felicidad.

Atentamente,

DAVID KNIGHT
300 Starboard Court
Ft. Collins, CO 80525
U.S.A.



APPENDIX VIII

Memorandum of Understanding between: David Knight and Intrepid Travel

Community Based Tourism Research Project, Peru

The purpose of this document

- is to clearly identify the objectives and management arrangements around this research project partnership.

Background

David Knight is enrolled as a PhD candidate, Warner College of Natural Resources - focussing on teacher travel experiences and pro-poor tourism, Colorado State University, Ft Collins, Colorado

David first approached small group adventure operator, Intrepid Travel (US office) in October 2011, during his 1st semester of his PhD, to enquire if we may be interested in collaborating on research. After discussions over several months with Intrepid's Melbourne based head office, represented by Jane Crouch, Responsible Travel Manager, it was agreed that research in Peru into the impacts of Intrepid's operations in rural communities, particularly those of the Sacred Valley, would be a suitable fit with both parties' requirements.

Rationale/scope of the project

Peru possesses a tremendous array of natural, cultural, and archaeological resources, making it an ever more popular site for so-called ecotourism, adventure tourism, and heritage or indigenous tourism. Sites of archaeological significance such as Machu Picchu and the Nazca Lines have lured increasing numbers of tourists to Peru. Intrepid Travel chose to establish its Latin American head office in Peru and its largest operational office in Cuzco, as this is the most popular destination for Intrepid travellers in the region.

Most tourists to Peru spend time in the charming city of Cuzco and from there travel through the Sacred Valley direct to Ollantaytambo, approximately 60km to the NW, or an approximately 20km further to Aguas Calientes, the town closest to Machu Picchu. Few travellers actually stop in the communities that are dotted in and around the Sacred Valley, before Ollantaytambo, beyond a perfunctory refreshments and toilet stop along the way.

The Intrepid style is not just to take visitors to sites. Intrepid endeavours to engage travellers in 'real life experiences' and provide travellers with opportunities to meet the local people and learn about their lives. It is with this intention that Intrepid includes visits to Sacred Valley communities as part of most trip itineraries in the region. Intrepid has sought these opportunities and has chosen communities who have approached the company with interest in engaging in tourism.

Intrepid Travel is well aware that tourism to rural or remote communities has both positive and negative impacts. In taking full responsibility for its operations, and with awareness of the growing demand for its tours in the region, Intrepid has chosen to participate in this research.

Objectives of the partnership

David Knight's study will seek to address two primary research questions.

Primary Research Question 1: *In addition to economic benefits, what changes have occurred as a result of Intrepid trips in the selected communities?*

In answering this question, David Knight will provide Intrepid with an assessment of its impacts on rural or remote communities in Peru. The report on each community for Intrepid will address the following objectives related to this research question:

- a. Assess the economic impacts of Intrepid trips as measured by total tourism revenues in host communities, employment opportunities for local people, or other factors
- b. Evaluate local perspectives on any socio-cultural and/or environmental impacts of Intrepid trips on host communities
- c. Approximate the pro-poor impacts of Intrepid trips by estimating the percentage of economic benefits reaching the poor in destination areas

Primary Research Question 2: *How are Intrepid trips addressing/meeting community interests or concerns?*

In answering this question, David Knight will provide Intrepid with recommendations for reviewing and refining its operations, helping to make Intrepid's community-based tourism offerings optimal for key stakeholders, profitable and therefore sustainable for both the communities and Intrepid. The report on each community for Intrepid will address the following objectives related to this research question:

- a. Identify local perspectives on community assets and challenges
- b. Identify host community views of tourism and of Intrepid trips in particular
- c. Create a list of local interests, concerns, and ideas related to the way Intrepid trips currently occur
- d. Compile a list of recommendations for the community and for Intrepid, focusing on community-defined needs or interests and expected impacts on the poor

With the data gathered during the research period, David will prepare two documents:

1. a report for Intrepid
2. a dissertation document to meet his academic requirements.

Research Methodology

See Appendix 1

Partners

The Memorandum of Understanding is between:

- David Knight, PhD candidate, Warner College of Natural Resources, Colorado State University
- Intrepid Travel Pty Ltd - currently represented by Jane Crouch, Responsible Business Communications Specialist

Roles and Responsibilities

David Knight, as the researcher, is accountable for:

- Undertaking a literature review of relevant literature on the topics of indigenous tourism and poverty alleviation.
- Ensuring the research questions seek to address both academic requirements and Intrepid's needs for practical outcomes.
- Undertaking the field research in Peru.
- Preparing a budget for travel and research, & provide progress reports of actual expenditure.
- Taking out travel insurance covering medical treatment, evacuation if necessary and luggage.

- Finalizing recruitment and employment arrangements for a Peruvian research assistant/translator.
- Arranging and paying for board and lodging in the communities, both for himself and for the research assistant/translator.
- Documenting the research and providing periodic updates to Intrepid, as agreed below.
- Conducting the research in an ethical manner, as per the requirements of Colorado State University, and with respect for Intrepid's reputation, relationships with the host communities and for visiting Intrepid travellers.
- Providing Intrepid with a final report /dissertation, including recommendations, for use by Intrepid and its clientele.
- Sharing the research recommendations with the communities, in a format they can access. This format to be determined during conversations with the respective community tourism associations.

Intrepid Travel Pty Ltd - (currently represented by Jane Crouch) is accountable for:

- Providing general information about Intrepid, relevant company policies and trip itineraries.
- Setting guidelines for Intrepid's expectations of the research.
- Facilitating communications and arrangements with Intrepid's operating company in Peru, PEAK South America.
- Arranging the timely payment of Intrepid's funding commitment.
- Being available, approximately ½ day/month for consultation during the field research and providing guidance and feedback.
- Ensuring the research findings are utilised to improve the manner in which Intrepid trips operate in the relevant communities, and adapted as applicable for other rural or remote communities.
- Respect the intellectual property of David's final report/dissertation and only use it in an agreed manner.

Current logistics plan and anticipated timeline

May 2013

- MOU agreed and signed
- David completing coursework component of his PhD.
- Fernando short-listing possible research assistant/translator candidates
- Fernando & Norma continue discussing research with communities

June 2013

- David preparing for Peru
- Fernando short-listing possible research assistant/translator candidates
- Fernando & Norma settled /agreed research with communities

July 2013

David arrives in Cuzco

David makes final selection of research assistant/translator

- Mid July - commence field research Community #1

Aug 2013

- commence field research Community #2

Sep 2013

- commence field research Community #3

Oct/Nov 2013

- commence field research Community #4 *

Nov /Dec 2013

- finish any incomplete field research /follow-up, returning to communities as required
- compile research data

Jan 2014

- further community research (if additional research funds become available). Possibly to communities in Colca Canyon and Lake Titicaca, or possible low season return visits to the Sacred Valley communities TBD.

Within 6 months of completion of field research, in 2014

- provide Intrepid with a final report of findings and recommendations
- a general overview of the study will be provided to Intrepid within 1 month of completion of field research; this document will contain items such as:
 - information about research team members
 - hours of data collection
 - hours of team interaction discussing data
 - types of information collected through field notes, PhotoVoice, and semi-structured interviews
 - number of individuals interviewed
 - how respondents for PhotoVoice and semi-structured interviews were selected
 - interview locations
 - information about respondent diversity
 - an outline of preliminary findings addressing each of the 7 project objectives

Before May, 2015

- complete dissertation. (Noted that after David's field work he will be working as a teacher or researcher at CSU and these responsibilities will necessitate a long period of time to complete his dissertation.)

* At the time of the finalisation of this MOU, agreement of the communities to participate in the research is still to be confirmed, and a decision may be made to conduct the research in 3 communities (instead of 4) for a longer period of time per community.

Communications & Information Sharing

David and Intrepid (Jane) to keep each other informed of any matters, research plans, relevant Intrepid or PEAK business arrangements or any other matters that arise that may greatly impact the carrying out or completion of this research as planned.

Communications will be open, honest, and respectful - with an understanding of each others time constraints.

David - whilst in Peru, to provide Intrepid (Jane) with:

1. an email update and skype call from Cuzco before heading out on the first community visit.
2. an email progress report and skype call follow-up after each community visit, detailing any areas where need help or where there are obstacles that are impeding on David's ability to conduct the research. We would welcome any feedback that can be acted on immediately.

3. after each community visit, a story for readers of Intrepid Express, 250-350 words, sharing your 'general' experience of each community (ie 3-4 stories). This can be casually written, blog-style, with your observations, funny or quirky happenings, and descriptions of daily life - written for would-be travellers.
4. financials/budget progress report.
5. a final report of recommendations to Intrepid within 6 months of completion of field research. This may be an abstract of the dissertation.

Jane -

1. to be available (or arrange alternative colleague) to discuss progress reports and debrief each community stay.
2. to provide feedback as needed.
3. to facilitate support from the PEAK South America office.

Conflict resolution

In developing this research partnership, it's understood that both David and Intrepid are investing significant resources of time, reputation, and money; and the time and expertise of their colleagues and managers towards endeavouring to achieve successful outcomes from the research.

During the partnership, there may be areas where we don't agree.

The partners to this agreement (David and Intrepid, represented by Jane) will endeavour to resolve any disagreements or disputes that arise, through open communications.

Where a resolution can not be found, each partner will seek advice from their colleagues and bring this to the discussion table - either documented, or in person via a skype or phone call.

David's advisors may include, and are not limited to:

Prof Stuart Cottrell, Supervisor, Human Dimensions of Natural Resources

Dissertation Committee:

Prof Alan Bright, Human Dimensions of Natural Resources

Prof Kathy Pickering, Anthropology

Adjunct Faculty Lenora Bohren, Anthropology

Intrepid (Jane's) advisors may include, and are not limited to:

Jelina Mitrovic, Responsible Business Manager, Intrepid

Martin Ruffo, Latin America Product Manager, Intrepid

Geoff Manchester, Intrepid Director and Co-founder

Mary Moses, General Manager, PEAK South America

Paul Taylor, Senior Lecturer, William Angliss Institute (and former Intrepid CBT researcher)

Through open dialogue we will endeavour to find a mutually favourable resolution.

Resources

Finance

Intrepid Travel Pty Ltd will provide US\$10,000 towards the costs of David undertaking the field research.

These costs include:

- airfares
- insurance
- all accommodation and travel while in Peru - in Cuzco and the host communities
- meals
- computer, recorder, camera and other interview equipment

- salary, accommodation and food costs for the research assistant /translator
- water filter, battery charger, poster paper, markers, or other supplies needed for work in the field

These funds will be transferred to David's bank account in 4 stages, tying in with budget requirements:

- An initial lump sum to cover airfares, equipment, and (in part or in whole) the first 3 months of the project, including visits to the 1st and 2nd communities - to be paid in June: US\$5000
- A 2nd instalment to cover costs in the 3rd (and 4th if included) communities - to be paid in October: US\$2000
- A 3rd instalment to cover costs during David's time in Cuzco collating the data with members of respective research teams, to be paid toward the end of November (covering any outstanding expenses accrued previously between community visits, as well as expenses accrued through the final stages of team-based data analysis/sharing): US\$2000
- A 4th instalment after providing Intrepid with a final findings and recommendations report: US\$1000

Each funds transfer will be in USD to David's personal bank account. (At time of print, in early June, in view of fluctuating exchange rates, Intrepid changed its financial commitment to be paid, from AUD to USD.)

Should, for any unforeseen reason, it be considered necessary to discontinue the partnership during the planned research schedule, Intrepid will pay for the expenses David has incurred up to that time, including return airfares.

Budget - see [Appendix 2](#)

Insurance

David to take out travel insurance covering medical treatment, evacuation if necessary, and luggage, for the period of his field research in Peru.

Insurance policy details:

Name: David Knight

Company: Allianz

Plan: Trip Protection Plus

Policy No.: EUSP2037619697

Travel dates: July 1, 2013 - December 15, 2013

For emergency assistance during your trip call: 1-804-281-5700 (Outside U.S. / Collect)

Review and evaluation

Both partners to conduct a periodic assessment of the effectiveness of the partnership. This is best done after each community stay and after David has submitted his progress report (mini evaluation of findings), Intrepid Express story, and budget report from each community stay.

During the field research, Intrepid may seek feedback from the PEAK Latin America representatives and also from the host communities.

Authorisation

The signing of this MOU is not a formal undertaking or legally binding. It implies that the signatories will strive to reach the objectives stated in the MOU, to the best of their ability with the available resources, and in good faith.

Partner:

David Knight

Title - PhD candidate/researcher

Date

Signature

Partner:

Intrepid Travel Pty Ltd, represented by Jane Crouch

Title - Responsible Business Communications Specialist

Date June 11, 2013

Signature

APPENDIX IX

POSITION OPENING: TOURISM RESEARCH ASSISTANT AND TRANSLATOR

PEAK Travel Group in Cuzco is partnering with a researcher from Colorado State University (CSU) to assess community views of tourism in Peru's Valle Sagrado. The research is set to take place between July and December of 2013. Although the details of the project will be decided on more specifically through collaborations with each community, several preliminary goals of the project include:

1. to assess local views of tourism-related benefits and impacts,
2. to explore how Intrepid trips are currently aligning with community interests, and
3. to provide space for communities to propose and pursue changes that might be made to improve tourism in their vicinity.

David Knight is the researcher from CSU who will be directing the project. He is looking to hire a research assistant upon his arrival in July, 2013. Below are descriptions of applicant qualifications, position responsibilities/expectations, and benefits/payment. Thank you for your interest.

Applicant Qualifications

- Fluent in Spanish and Quechua
- Partial fluency in English
- Completed or nearly completed university degree program in tourism and/or anthropology
- Strong communication skills
- Highly recommended by reputable reference(s)
- Demonstrable humility, optimism, and friendliness
- Strong computer typing skills

Responsibilities and Expectations

- Available for project duration (July 15-December 15)
- Commitment to 8-hour workdays, 6 days per week
- Provide translation from Quechua to Spanish, and to English when possible
- Help establish strong relationships with locals in each community (Chichibamba, Amaru, Sacaca, and others to be determined)
- Help build and strengthen a research team that includes at least two locals in each community
- Contribute to all research team discussions with insights, suggestions, activities, and analyses
- Keep a detailed field notebook, separating general observations from personal reflections
- Translate for and take notes during 10-25 conversational interviews in each community
- Transcribe recordings of interviews from Quechua into Spanish and/or English using a computer
- Possibly teach youth to use cameras so they can express their understanding of tourism impacts
- Interact with community members in a one-on-one fashion, offering to help with their daily chores whenever possible
- Treat all interview and other project data as confidential information

Benefits

- Salary of 750 soles per month
- All food and accommodations covered for time spent in communities
- Opportunity to partner with a highly reputable international travel company (PEAK Group/Intrepid Travel)
- Opportunity to develop research skills in community development, tourism, and anthropology

APPENDIX X

CONTRATO DE LOCACIÓN DE SERVICIOS

Conste por el presente documento el Contrato de Locación de Servicios Profesionales que celebran de una parte David W. Knight, con Pasaporte Estadounidense No. _____, que en adelante se le denominará **EL EXTRANJERO**, y de la otra parte, el Sr. _____, identificado con DNI N° _____, con domicilio en _____, Distrito de _____, Cusco, a quién en adelante se le denominará **EL TRADUCTOR**, en los términos y condiciones siguientes:

CLÁUSULA PRIMERA: Antecedentes

EL EXTRANJERO es una persona natural de nacionalidad estadounidense que visita el Perú, y las comunidades en Cusco, para lo cual, necesita los servicios de un traductor que hable quechua e inglés, a fin de poder comunicarse adecuadamente, considerando las siguientes actividades específicas:

1. Proporcionar traducción del quechua al español y al inglés cuando sea posible
2. Disponible para dos meses enteros o su equivalente, es decir, 60 días.
3. Ayudar a establecer relaciones sólidas con los habitantes de cada comunidad (Chichibamba, Amaru, Qorqor, y otros por determinar)
4. Ayudar a construir y fortalecer un equipo de investigación que incluye al menos dos locales de cada comunidad
5. Contribuir a los debates del equipo de investigación con ideas, sugerencias, actividades y análisis
6. Mantenga un cuaderno de campo detallado, separando las observaciones generales de las reflexiones personales
7. Traducir y tomar notas durante las entrevistas conversacionales en cada comunidad.
8. Transcribir las grabaciones de las entrevistas de quechua al español y/o inglés con una computadora.
9. Quizás enseñar a los jóvenes a utilizar las cámaras para que puedan expresar su comprensión de los impactos del turismo.
10. Interactuar con los miembros de cada comunidad, ofreciendo a ayudar con sus tareas diarias cuando sea posible.
11. Tratar a todos los datos y la información del proyecto como información confidencial.

EL TRADUCTOR es un profesional con conocimiento del idioma español, quechua e inglés, además de suficiente experiencia en traducción para extranjeros.

CLÁUSULA SEGUNDA: Objeto del Contrato

Por el presente contrato, **EL TRADUCTOR** se obliga a prestar sus servicios a favor de **EL EXTRANJERO**, a título de Locación de Servicios Profesionales, a fin de cubrir el requerimiento de servicios indicado en la cláusula primera de este documento.

En ese sentido, **EL EXTRANJERO** se obliga a pagar los honorarios profesionales de **EL TRADUCTOR**, en la forma y oportunidad pactada en la cláusula Tercera del presente contrato.

CLÁUSULA TERCERA: Retribución Económica y forma de pago

EL EXTRANJERO pagará a **EL TRADUCTOR** por los servicios materia del presente contrato la suma de S/. 31.25 (Treinta y Uno con 25/100 Nuevos Soles) por día de servicios efectivo, a ser cancelados cada 02 (dos) semanas.

Adicionalmente, **EL EXTRANJERO** cubrirá los gastos de alojamiento y comida de **EL TRADUCTOR** en cada comunidad que visiten, y cubrirá el gasto del pasaje de ida y vuelta de **EL TRADUCTOR** entre Amaru y Cusco/Lamay, el cual entregará semanalmente.

Al cumplir **EL TRADUCTOR** con las responsabilidades delineadas en este contrato, recibirá un certificado de la empresa Intrepid/PEAK como demostración/prueba de los servicios brindados???

CLÁUSULA CUARTA: Vigencia

El presente contrato tiene vigencia de tres (03) meses, siendo que rige a partir del ____ de Setiembre de 2013 hasta el ____ de ____ de 2013. No obstante, es posible prorrogar el plazo pactado o realizar modificaciones al presente contrato, previo acuerdo entre las partes que conste por escrito.

CLÁUSULA QUINTA: Confidencialidad

EL TRADUCTOR se compromete a guardar estricta confidencialidad respecto a toda la información que sea puesta a su disposición con ocasión del presente servicio, o hubiera recibido bajo reserva, e incluso toda aquella a la que haya tenido acceso bajo cualquier circunstancia.

Ante el incumplimiento de esta obligación **EL EXTRANJERO** se encuentra facultado para tomar las acciones civiles y penales que estime pertinentes contra **EL TRADUCTOR**.

CLÁUSULA SEXTA: Naturaleza contractual

El presente contrato es de naturaleza civil, por lo tanto esta regulado por las normas del Código Civil peruano. En consecuencia no genera ningún vínculo, derecho o expectativa de carácter laboral, quedando por ello excluido de la legislación laboral vigente.

En señal de conformidad las partes suscriben este documento, en dos ejemplares, en la ciudad de Cusco, el ____ de Setiembre del año 2013

EL EXTRANJERO

EL TRADUCTOR

David W. Knight

NAME

APPENDIX XI

Waiver of Documented Consent with Interview Script

Colorado State University

Study Title: *Emic Perceptions of Poverty Alleviation Through Tourism in Peru's Sacred Valley*

Dr. Stuart Cottrell, Ph.D.
Dept. of Human Dimensions of Natural
Resources
970-491-6355,
cottrell@warnercnr.colostate.edu

David Knight, Ph.D. student
Dept. of Human Dimensions of Natural
Resources
303-819-2769, dkespecial79@gmail.com

A) Request for waiver of documented consent:

The Co-Investigators are requesting a waiver of informed consent. We wish to use a verbal informed consent process rather than written consent. The only record linking the subject and the research would be the consent document as no identifying information will be collected and recorded during each personal interview. No personal identifiers will be attached to any of the data used in this proposal. Rigorous steps are being taken to ensure confidentiality. All data, whether interview transcripts and related notes or digital recordings, will be stored in a locked cabinet in the PI's office for three years and will be destroyed after that period of time. With no additional consent form to link the data to each participant, the chances of breach of confidentiality decreases. The principal risk associated with this research is a minimal risk of breach of confidentiality. Participants in this study are being asked about how they perceive well-being, poverty, and tourism in their community, which doesn't involve any questioning of a psychological nature, or about their physical health. Each subject will be asked if they would like documentation linking that person with the research, and the subject's wishes will govern. Finally, this research involves no procedures for which written consent would normally be required.

B) The following verbal script (English) will be used to inform the interviewees about research activities. This script will be used for informed consent before an interview takes place:

Hi, my name is David Knight. Thank you for taking your time to talk with me. A team of individuals will be conducting this research over the next several weeks. These individuals include me, a translator from Cuzco, and several individuals from your own community who have agreed to help us. Intrepid Travel will also be involved in the research. They are providing the money so I can be here.

The purpose of this study is to help Intrepid Travel better understand how you feel about tourism. Are the visitors they bring here helping your community? Is tourism changing your way of life? Do you have any ideas about how tourism can be improved? Why do some of your people work in tourism and others do not? These are the kinds of questions I'd like to ask you.

I am doing this research as a part of my graduate studies at Colorado State University. I'm looking forward to having a conversation with you about tourism and your way of life here. (Insert person's name) recommended that I speak with you because you (do or don't) work with Intrepid Travel. He/she said you may have some things to share about tourism here.

This conversation will be informal. The conversation will last about 45 to 90 minutes and will include about 12 questions. It could be shorter or longer depending on your interest and availability. Is this a good time for the interview or would you prefer to meet at another time and specific place? [take note of time and place – OR – if they agree to begin now – thank them and continue]

May I have your permission to record what we discuss? I would like the opportunity to listen to our conversation again using this recorder to make sure that I correctly understand what you say. I will not share the recordings or my notes with anyone except for members of the research team, and I will destroy these materials at the end of the project. The final results will be shared with your community, with Intrepid Travel, and with other researchers. This may help travel companies and researchers improve the way tours are run in communities like yours. Please let me know if you feel uncomfortable in any way, so that I may make changes to help you feel more comfortable.

Are you willing to have a conversation with me? If you agree to speak with me, you will receive the equivalent of five U.S. dollars at the end of the conversation to compensate you for your time.

[If no, discontinue interviewing process:] *OK, thank you for your time and interest!*

[If yes:] *Is it alright if I use the information you share with me in a final report as long as I do not reveal that they were your comments?*

[If no, discontinue interviewing process:] *OK, thank you for your time and interest!*

[If yes:] *May I use this recorder since I will not share the recording with anyone except the research team and will destroy it when I've finished the project?*

[If no, do not use recorder during interview.]

[If yes, begin using recorder and start the interview.]

INTERVIEW QUESTIONS

Individual	Question
All	<ul style="list-style-type: none">• What do you like about your community?• Describe what your life was like before tourism.• Is your life here different because of tourism? Please explain.• Is this community different because of tourism? Please explain.• What are some challenges your community is currently facing? How are they being addressed?• Are there any negative aspects of tourism? Please explain.

- What do you think it means to be poor?
- Involved in tourism
- Do you want Intrepid groups to continue coming here? Why or why not?
 - Have you benefited from Intrepid visits? Please explain.
 - In the next five years, what do you hope to do with the money your family makes from tourism?
 - Do you have any concerns regarding your association or interactions with Intrepid?
 - How can these concerns be addressed?
- Not involved in tourism
- Would you like to work in tourism? Why? If so, in what ways?
 - Why are you not involved in tourism now?
 - What was this community like before tourism?
 - Are there any changes you would like to see in how tourism happens in this community?
-

CLOSURE

That's all I wanted to ask you. Would you like to add anything, or do you have any more questions for me?

Thank you for agreeing to participate in this conversation with me today. Here is the \$5 (or equivalent) I promised for your time and involvement in this study.

Additional questions (as time allows)

1. *What does it mean to be a _____ (member of this community)?*
2. *What do you appreciate or enjoy most about your people?*
3. *What do you appreciate or enjoy most about these lands?*
4. *How do visitors to this community learn from you, and how do you learn from visitors?*
5. *How has tourism here affected your people's daily activities?*
6. *How has tourism here affected village ceremonies and practices?*
7. *What questions would you like to ask visitors if you could?*
8. *What questions would you like to ask Intrepid Travel if you could?*
9. *What do you like about tourism?*
10. *Is there anything about tourism you don't like?*
11. *Do you think tourism will influence decisions of young people to stay in your village in the future, rather than move away?*

C) The following is a translation into Spanish of the verbal script provided above:

Hola, mi nombre es David Knight. Gracias por hablar conmigo. Un equipo de individuos estará haciendo una investigación aquí durante las semanas que vienen. Estas personas incluirán yo, un traductor de Cuzco, y quizás algunas personas de su comunidad. Algunos

empleados de Intrepid Travel también estarán involucrados en la investigación. Ellos están aportando este proyecto financieramente.

El propósito de la investigación es ayudar a Intrepid mejor entender cómo se sienten ustedes acerca del turismo aquí. ¿Cómo les están beneficiando a ustedes los visitantes de Intrepid? ¿Está cambiando su calidad o forma de vida el turismo? ¿Tienen ustedes ideas sobre cómo se puede mejorar el turismo aquí? ¿Por qué quieren trabajar en el turismo solo algunos en su comunidad? Estas cosas representan un ejemplo de lo que quisiera preguntarle a usted.

Estoy haciendo la investigación como parte de mis estudios postgrados en la Universidad Estatal de Colorado. Espero poder tener una conversación con usted sobre el turismo y su forma de vida aquí. (nombre de persona) sugirió que le hablara a usted porque usted trabaja (o no) con Intrepid Travel. El/Ella me dijo que tendría ideas y pensamientos acerca del turismo aquí.

Esta conversación será informal. La conversación podría durar entre 45 y 90 minutos, y incluirá 12 preguntas. Podría ser aún más corta o más larga según su interés y disponibilidad. ¿Ahora es un buen momento para la entrevista, o preferiría usted que nos encontráramos en otro lugar/momento?

¿Puedo grabar nuestra conversación? Me gustaría escuchar la conversación de nuevo más tarde, y esta grabadora me ayudara hacer eso. No compartiré la grabación ni mis apuntes con nadie mas (salvo con los miembros del equipo investigador), y destruiré estos materiales al final del proyecto. Los resultados finales se compartirán con su comunidad, con Intrepid, y con otros investigadores. Lo que aprendemos podrá ayudar que empresas turísticas e investigadores aumenten su entendimiento del turismo en comunidades como la suya. Favor de decirme si se siente incómodo durante nuestra conversación para que pueda hacer cambios necesarios con el fin de que se sienta mejor.

¿Esta dispuesto de tener una conversación conmigo? Al final de la conversación, le daré el equivalente de 5 dólares estadounidenses por su tiempo.

[no]: ¡Gracias por su tiempo!

[si]: ¿Esta bien si uso la información que me da usted en un reportaje final, si escondo su nombre?

[no]: ¡Gracias por su tiempo!

[si]: ¿Puedo usar esta grabadora, ya que no estaré compartiendo la grabación con nadie salvo con el equipo investigador, y destruiré la grabación al final del proyecto?

[Empezar la entrevista]

...

PREGUNTAS

Individual	Pregunta
Todos	<ul style="list-style-type: none">• ¿Qué le gusta sobre su comunidad?• ¿Describa cómo fue su vida antes del turismo?• ¿Es diferente su vida aquí a causa del turismo? Favor de explicar.• ¿Es diferente esta comunidad a causa del turismo? Favor de explicar.

	<ul style="list-style-type: none"> • ¿Cuáles son algunos desafíos que tiene su comunidad? ¿Qué están haciendo para resolverlos? • ¿Qué son los aspectos negativos del turismo? Favor de explicar. • ¿Qué es la pobreza? ¿El bienestar?
Involucrados en el turismo	<ul style="list-style-type: none"> • ¿Quiere que siga viniendo Intrepid a su comunidad? Favor de explicar. • ¿De qué manera lo han beneficiado a usted las visitas de Intrepid? • ¿En los 5 años que vienen, que espera hacer usted con las ganancias del turismo? • ¿Tiene usted algunas preocupaciones para su asociación o para Intrepid? • ¿Cómo se puede arreglar estos problemas?
No involucrados en el turismo	<ul style="list-style-type: none"> • ¿Le gustaría trabajar en el turismo? ¿De qué manera, y por qué? • ¿Por qué no trabaja usted en el turismo ahora? • ¿Cómo fue esta comunidad antes del turismo? • ¿Hay algunos cambios que quisiera usted realizarse acerca del turismo en su comunidad?

A Concluir:

Eso es todo. ¿Le gustaría decirme algo más, o aún tiene algunas preguntas para mí? Gracias de nuevo por participar en esta conversación conmigo hoy. Aquí son los 5 dólares que le prometí por su tiempo e involucramiento en este estudio.

Preguntas adicionales (según permite el tiempo):

1. *¿Qué significa ser un miembro de esta comunidad?*
2. *¿Qué le gusta más sobre su gente? ¿Sobre estas tierras?*
3. *¿Cómo aprenden de usted los visitantes a esta comunidad, y cómo aprende usted de ellos?*
4. *¿Cómo afecta el turismo la actividad cotidiana aquí?*
5. *¿Cómo afecta el turismo las ceremonias y costumbres de su comunidad?*
6. *¿Qué quisiera usted preguntarles a los visitantes?*
7. *¿Tiene algunas preguntas para Intrepid?*
8. *¿Qué le gusta sobre el turismo? ¿Hay cosas que no le gusta sobre el turismo?*
9. *¿Piensa que el turismo influirá las decisiones de los jóvenes de quedarse en la comunidad en el futuro en vez de mudarse a la ciudad?*

APPENDIX XII

Blog Links (for Intrepid)

Blog #1:

<http://www.intrepidtravel.com/adventures/a-hairy-neck-in-peru/>

Blog #2:

<http://www.intrepidtravel.com/adventures/peruvian-beats-eats-and-atahualpas-revenge/>

Blog #3:

<http://www.intrepidtravel.com/adventures/the-road-to-chichubamba/>

Blog #4:

<http://www.intrepidtravel.com/adventures/the-egg-of-the-ceviche/>

Blog #5:

<http://www.intrepidtravel.com/adventures/spider-shakes-and-impacts-in-perus-sacred-valley/>

Blog #6:

<http://www.intrepidtravel.com/adventures/valuable-taters-tourism-peru/>

Blog #7:

<http://www.intrepidtravel.com/adventures/incan-community-research/>

APPENDIX XIII

Encuesta:
Impactos del Turismo en Qorqor

*Favor de completar el cuestionario y devolverlo al investigador. Todas respuestas son confidenciales.
Gracias por su participación.*

1. ¿Que le gustaría más sobre Qorqor?

2. ¿Es mejor Qorqor con el turismo? Favor de explicar.

3. ¿Cómo era su vida antes del turismo?

4. Favor de estimar: De todo el dinero que gana su familia en un mes normal, ¿qué parte viene del turismo? Haga una 'x' en la línea dada.

0% _____ 25% _____ 50% _____ 75% _____ 100%
(nada es del turismo) (todo es del turismo)

5. Favor de estimar: De todo el dinero que gana su familia a través del turismo cada mes, ¿qué parte viene de las visitas de Intrepid? Haga una 'x' en la línea dada.

0% _____ 25% _____ 50% _____ 75% _____ 100%
(nada viene de Intrepid) (todo viene de Intrepid)

6. Favor de estimar: ¿Cuál es el sueldo mensual de ...

...un varón de Qorqor? _____ soles/mes
...una mujer de Qorqor? _____ soles/mes

7. Favor de estimar: ¿Cuánto gana usted cada mes a través del turismo?

_____ soles/mes

8. En los 5 años que vienen, ¿cómo esperaría usted usar el dinero que gana su familia del turismo?

9. ¿Cuántos años tiene usted? _____

10. ¿Cuántos años ha vivido usted en Qorqor? _____

11. Soy: _____ varón _____ mujer

12. Favor de escribir otras sugerencias o comentarios en las líneas abajo.

Gracias por su participación.

Para el investigador: # de cuestionario _____ - _____

fecha ____/____/____