

THESIS

RELATIVE DEPRIVATION, GLOBALIZATION, AND REFLEXIVITY: A CROSS-
COMMUNITY COMPARATIVE ANALYSIS OF TOURISTS AS A SALIENT REFERENCE
GROUP IN THE MEXICAN YUCATÁN PENINSULA

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ABSTRACT

RELATIVE DEPRIVATION, GLOBALIZATION, AND REFLEXIVITY: A CROSS- COMMUNITY COMPARATIVE ANALYSIS OF TOURISTS AS A SALIENT REFERENCE GROUP IN THE MEXICAN YUCATÁN PENINSULA

As developing countries are becoming more globally engaged, inequality continues to persist. As a result, there has been an increased interest in relative deprivation and its implications for societal health and wellbeing (i.e. Wilkinson and Pickett 2007, Ravallion 2008, Mangyo and Park 2010). To advance the current literature of relative deprivation, I will explore the impact that increased interactions with tourists have on participants' perceptions of relative deprivation and inequality in six different communities in the Mexican Yucatán peninsula.

A principle tenant of relativity in the context of deprivation is the existence of a comparative component, known as reference groups. A central question in the relative deprivation literature poses is: When we speak of the relative deprivation of a population, just who is it that we are comparing them to? In this study, I conduct 64 semi-structured interviews to addresses what type of differences in reference group formation exist at the community and individual level in a globalizing world. Specifically, I explore the way the constant flow of international tourists through the communities in the Yucatán Peninsula might create a type of “global-local” reference group that extends beyond the literature’s traditional understandings of reference groups. An important methodological contribution to reference group theory is also made, as opposed to previous research, participants’ in this study self-selected salient reference groups for themselves.

Findings suggest that the way in which an individual defines inequality impacts their perceptions of its existence and persistence within their own communities, as well as the basis for how their reference group(s) for self-comparison form. In addition, salient reference groups extend beyond the traditional types of reference groups, and, in this case, include foreign tourists. Drawing on these findings, I posit that in this study, participants' daily interactions, with whom they frequently interact, and at what level of depth these interactions take place influences the way in which they perceive themselves in comparison to others, and with whom they tend to compare themselves to. Essentially, the salience of tourists as a reference group represent one of a multitude of ways increased global interactions under the umbrella of globalization influence reference group formation. This suggests that there are likely a variety of ways that a developing nation's move toward a more globalized society impact individuals perceptions of inequality, and that there are a plethora of individuals and groups that can emerge as salient reference groups as a result of the globalization process.

In the future, it appears that as countries continue to develop, relative deprivation will become an increasingly important way to conceptualize and address poverty and social problems as a whole. Moving forward, qualitatively building on relative deprivation and reference group theory advancements may prove to be integral to enhancing both individual and societal wellbeing, and so must continue to be examined carefully as part of the solution to decreasing inequality and relative poverty around the globe.

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Chapter 1: Introduction

Revisiting the roots of ‘keeping up with the Joneses’

A house may be large or small; as long as the neighboring houses are likewise small, it satisfies all social requirements for a residence. But let there arise next to the little house a palace, and the little house shrinks to a hut. The little house now makes it clear that its inmate has no social position at all to maintain, or but a very insignificant one; and however high it may shoot up in the course of civilization, if the neighboring palace rises in equal or even in greater measure, the occupant of the relatively little house will always find himself more uncomfortable, more dissatisfied, more cramped within his four walls.

In what may be the earliest critical commentary on “keeping up with the Joneses,” Karl Marx (1847) subtly hints at the way that perceptions of relative inequality leave individuals feeling “uncomfortable” and “dissatisfied.” Despite Marx’s uncanny foreshadowing of the importance of reference groups in understanding social inequality, it was not until the mid 20C that the concept sustained sociological attention in the work of Robert K. Merton. Merton sought in his theory of reference groups, to “systematize the determinants and consequences of those processes of evaluation and self-appraisal in which the individual takes the values or standards of other individuals and groups as a comparative frame of reference,” (1949 p. 288). Since then, theorists have continued to build upon Merton’s idea of relative deprivation and the role that reference groups play in forming our perceptions of it.

A central question this literature poses is: When we speak of the relative deprivation of a population, just who is it that we are comparing them to? Singer, (1981) noted that race, gender, education, and/or geographic proximity are central in forming points of reference. Through the 1990s and 2000s, Wilkinson’s macrocomparative studies of relative deprivation utilize cross-national or intra-national cross-state data, so reference group formations were examined primarily based on their relationship to geographic location. In fact, prior to the work of Mangyo

and Park (2010), reference groups were generally limited to “geographic location or demographic characteristics, such as age, gender or ethnicity,” (p. 460). In their analyses of self-reported data across China, Mangyo and Park (2010) find that in urban settings, relatives and classmates are prominent reference groups, whereas in rural locations neighbors are salient reference groups. Their work provides an important contribution to the literature on relative deprivation by adopting a more open-ended approach to understanding the concept in practice. However, it remains that the reference group categories used in this and other previous studies are defined *a priori* by researchers. Mangyo and Park’s (2010) research, for example, used survey results from the China Inequality and Distributive Justice survey which asked individuals about the average living standard of relatives, classmates, individuals with the same education level, coworkers, neighbors, and people living in their city, county, province, and country. This reliance on quantitative measures and focus on data objectivity is ironic given that the concept of relative deprivation necessitates subjective perceptions and self-comparisons.

There is a dearth of research that actively explores reference group definition via subjective interpretation, yet subjective interpretations of a reference group remains central to the concept of relative deprivation. As a result, it is unclear who would comprise a salient reference group for individuals if the topic were to be discussed freely and openly with them. Not only do these studies subject themselves to an elevated level of researcher bias by pre-determining categories to be tested for reference group salience, they also lack the ability to uncover a particular depth of understanding of reference group salience—a methodological gap in the relative deprivation literature that this thesis aims to contribute to. Specifically, this research addresses what type of differences in reference group formation exist at the community and individual level in a globalizing world.

Reference Groups in a shrinking world

The focus of this thesis is to understand relative deprivation and reference group formation at a more micro-level, but as it is couched within in the broader context of globalization. The increase in transnational corporations, migratory workers, and the business and leisure travels may very well likely influence the way in which reference groups are formed. The increasing global mobility of people holds transformative potential for how individuals perceive themselves in comparison to this newly defined reference group. Today, humans have the ability to interact more frequently and faster than ever before—even in the remotest of locations around the globe. This is particularly true for locations that become popular leisure destinations, even those that were once so far off the beaten path there was little chance of community members interacting with foreign tourists. To explore the impact of increasing globalization and international interactions, this research project is centralized in a geographic region where several communities serve as popular global tourist destinations. The research question driving this exploration asks:

1. Is global mobility impacting individual perceptions and experiences of relative deprivation and inequality?

A second contribution of this research lies in the fact that most studies involving relative deprivation are conducted within and across developed nations (noted in Ravallion 2008). This is in part due to the fact that in less developed countries, relativism is overshadowed by absolute poverty needs. Many studies have found that the importance of relative deprivation have increased as the world has continued to become more globalized. Globalization has increased rates of inequality (Scholte 2005, Kazgan 2001, Ravallion and Chen 2007; 2009) while paradoxically increasing living standards (Dollar and Kraay 2002) and decreasing extreme or absolute poverty (Ravallion and Chen 2007; 2009). This decline in absolute poverty and increase

in living standards raises the question: should analytic attention shift from a focus on meeting basic needs to a more relative understanding of poverty and inequality, particularly in the developing world? If so, what does this mean for the way we understand the existence of deprivation and how we might work toward its eradication?

In a micro case-study, Ravallion (2008) tests for welfare effects of relative deprivation in Malawi. In a discussion of the findings, Ravallion states utilizing a relative approach to poverty “will be more salient as the economy becomes more urbanized,” (p. 20). Moreover, his results “suggest that relative deprivation can be found even in poor but unequal countries, and that it is likely to become more important as such countries develop. It could be that future measurement practices even in developing countries will need to be more relativist, if they are to be consistent with perceptions of welfare on the ground¹,” (Ravallion 2008 pp. 20-21). As this thesis is one of the few studies of relative deprivation conducted in a developing nation, it may serve as a case that sheds more light on whether this is a valuable approach. A final contribution of this study is its focus on the effects of global tourism on reference group formation. This thesis examines the way in which individuals think about relative deprivation in the Mexican Yucatán Peninsula, a popular tourist destination in a developing nation.

Named one of Goldman Sachs “Next Eleven,” insinuating its potential to rise as one of the world’s top economies in the 21st century, Mexico exists, both literally and figuratively, as a bridge from the Global South to the Global North. Mexico serves as a unique nation-in-transition in the global sphere. Conducting research on relative deprivation and reference groups

¹ Ravallion (2008) refers to “perceptions of welfare on the ground.” In the context of his research, he is referring to the way in which the individuals in his study in Malawi provided self-assessments and relative assessments of their friends and neighbors. In the context of this research, this notion applies to the self-assessments of the participants as well as their relative assessments of others whom they have placed in their own reference group.

in Mexico's world of 'everchanging interactionary landscapes' will expand the literature outside the limits of its current boundaries.

While Mexico has become further integrated into the global economic system, perhaps increasing its national competitive advantage, inequality still persists as a troubling issue. Part of the problem of the persistence of inequality in Mexico is the federal government's approach to social programming, particularly its focus on alleviating absolute poverty over the last several decades. On the one hand, many individuals have benefitted from these programs, but on the other, many more citizens have been excluded from participating in Mexico's social programs. While overall rates of extreme poverty and need have decreased (Bayon 2009), the Mexican government's approach to poverty continues to divide Mexican society and has done virtually nothing to address problems of relative deprivation related to inequality. Given the prevalence of inequality within Mexican social policies and programs, it is imperative to keep the Mexican government's social policy decisions in mind as we examine experiences of relative deprivation and the formation of reference groups in the context of this research. The national policy not only sets the stage for understanding the context of inequality within Mexican society today, it has likely impacted the lives of individuals in this study and influenced the way in which they themselves have formed perceptions of poverty and inequality.

When considering Mexico's growing importance and integration in the global economic system, its prevalence of urban migration, its increased standard of living experienced in the 20th century (Astorga, Berges, and FitzGerald 2003), and its high prevalence of inequality, it is clear that it is a principal nation to study the relative deprivation's potentially increasingly importance as a country develops. In addition, the communities selected as sites for this research project represent the integration of globalization in varying ways and degrees, particularly in regards to

the tourism industry. Given this, the Mexican Yucatán Peninsula is an excellent site for understanding the complexities of relative deprivation and reference group formation in a constantly transforming world. My second research question therefore asks:

2. Has the constant flow of international tourists through this area created a type of “global-local²” reference group that extends beyond friends and family members? If so, how has a reliance on this type of reference group impacted people’s lives and their perceptions of themselves?

The application of a constructionist paradigm

Throughout this study, I adopt an approach that aligns with assumptions of a constructivist paradigm (Guba and Lincoln 2005; Rubin and Rubin 2012). This means I am working within a relativistic ontological approach, wherein reality is constructed locally and specifically (Guba and Lincoln 2005). In addition, my epistemological orientation is transactional and subjectivist (Guba and Lincoln 2005). Adopting this perspective implies that meaning is developed by individuals based on their past experiences and their own biases. By utilizing a constructionist approach, I seek to explain what I have seen through this study, understanding that my findings may not extend across time and space to explain precisely what is going on elsewhere in the world (Rubin and Rubin 2012). In order to align methodological techniques with a more phenomenological approach, this research adopts a qualitative approach designed to explore how the phenomena of daily transnational interactions might influence perceptions of inequality and processes for forming salient reference groups.

Conclusion

In the following sections of this thesis, I provide a more in-depth overview of reference group theory as it stems from relative deprivation, and more broadly, poverty literature.

² The concept of a reference group has been previously defined in this thesis; however, it is understood as a group that is used as a point of self-comparison for individuals. A “global-local” reference group addresses a comparison group wherein either (1) foreign individuals infiltrate a community’s local context, or (2) an individual enters a new local context as a foreigner.

Following this literature review, I turn to a historical chapter on Mexican social policy, addressing the way in which national social policies contributed to Mexico's problem of inequality and shape the context that participant's perceptions and expressions of relative deprivation are situated in. Then, I focus specifically on the research sites in the Yucatán Peninsula where this research takes place in Chapter 4. In Chapter 5 I describe my methods and methodology, explaining the reasons behind my particular methodological choices, as well as the process of selecting a sample and conducting data collection and analysis. In Chapter 6 I discuss the results of this study, suggesting that individuals who frequently interact with tourists do tend to utilize them as a reference group for themselves; however, the way in which this impacts their perceptions of inequality varies. Finally, I will conclude the thesis in Chapter 7 with a discussion of these results, an overview of study limitations, and suggestions for the direction of future research on reference group formation and relative deprivation.

Chapter 2: Poverty, Relative Deprivation, and Reference Group Theory: A Literature

Review

Introduction

In order to address relative deprivation and reference groups, it is essential to first review the broader importance of relativity in poverty research and literature. Below I discuss the rise of relativity in evaluating poverty and deprivation, tying these concepts to inequality and social wellbeing. I then provide a review of previous literature on reference group formation before closing the chapter with a reiteration of the important relationship between inequality, relative deprivation theory, and social problems.

Understanding the importance of relativity in approaches to poverty

To understand the important contribution that relative deprivation and reference group theory play in understanding social problems, we must review the primary social problem wherein relativity has become increasingly important—poverty. After the 1960s “War on Poverty,” the focus of poverty shifted to growing inequality (O’Connor 2001) and the utilization of a “relative poverty line.” Since this relativistic approach was introduced into the poverty literature, there has been ongoing debate regarding whether an absolutist or relativist approach to poverty research is more appropriate. While in “developing” nations, it was widely accepted that poverty should be measured in absolute terms due to the widespread problems of access to basic needs, there was not consensus regarding its adequacy in “developed” countries (Sen 1983). Thus, the question arose, “Should poverty be estimated with a cut-off line that reflects a level below which people are—in some sense—‘absolutely impoverished,’ or a level that reflects standards of living ‘common to that country’ in particular?” (Sen 1983 p. 153). While Sen (1983)

acknowledged the importance of the relative approach to poverty, she ultimately argued that absolute deprivation, reconfigured from its initial approach, was more pressing, as it addresses the capabilities of individuals, while relative deprivation concerns only “commodities, incomes, and resources,” (p. 153).

However, Peter Townsend, a leading theorist in the relativist approach to poverty, argues that “the necessities in life are not fixed...increasing stratification and a developing division of labor, as well as the growth of powerful new organizations, create, as well as reconstitute, ‘need’” (Townsend 1979 p. 17). From this viewpoint, deprivation is defined by an individual’s or a family’s inability to attain what others have attained in a society (Sen 1983). Townsend further posits that there is no way to separate standards of living from the particular historical conditions of a place and time (Rosenfeld 2010). Since standards of living are constantly changing, what it means to be poor is equally fluid (Rosenfeld 2010). Thus, “poverty as a social condition must be defined in reference to the period in which an individual lives,” (Rosenfeld 2010). At the same time, Rosenfeld (2010) notes that for Townsend, poverty “must be understood as locally defined according to the norms predominating in particular communities, allowing for comparative analysis [such as this thesis] that adjust for ‘differences in conditions between different societies at simultaneous moments in time’” (p. 104). Townsend is also clear that he does not see relative deprivation as synonymous with inequality. Instead, “poverty connotes a threshold effect: below some minimum level of resources, the experience of deprivation intensifies to the point where the individual is ‘excluded from ordinary living patterns, customs, and activities,’” (Rosenfeld 2010 p. 106, referring to Townsend).

As previously mentioned, Ravallion (2008) suggests that “relative deprivation can be found even in poor but unequal countries, and that it is likely to become more important as such

countries develop. It could be that future measurement practices even in developing countries will need to be more relativist, if they are to be consistent with perceptions of welfare on the ground,” (Ravallion 2008 pp. 20-21). Furthermore, he posits that utilizing a relative approach to poverty “will be more salient as the economy becomes more urbanized,” (p. 20). This calls into question Sen’s (1983, 2001) adherence to an absolutist and objectivist understanding of poverty in developing countries—particularly as we see developing countries urbanizing and increasing citizen access to basic needs and resources.

Relative deprivation theory

Relative deprivation theory is an important concept for understanding both relative poverty and reference group formation. Here, I will outline the relative deprivation literature, and trace its importance for understanding reference group formation. As suggested, Robert Merton was the first to pursue an understanding of relative deprivation and reference group theory. His work laid the foundation for Runciman’s (1966) definition of relative deprivation theory:

We can roughly say that [a person] is relatively deprived of X when (i) he does not have X, (ii) he sees some other person or persons, which may include himself at some previous or expected time, as having X (whether or not this is or will be in fact the case), (iii) he wants X, and (iv) he sees it as feasible that he should have X.

This theory implies that individuals tend to compare themselves to particular persons or groups in society, determining their own social position through referring to the position of others. Simplified, Runciman describes relative deprivation as “the extent of the difference between the desired situation and that of the person desiring it” (1966 p. 10). Runciman’s idea was later extended by Easterlin (1974), who hypothesized that relative deprivation was responsible for the stagnation of growth in the proportion of the population that considered themselves happy, even

as economic growth flourished. This was perhaps one of the earliest indications that a relationship might exist between inequality and wellbeing.

Relative Deprivation, Health, and Wellbeing: A Cause for Social Concern?

In the early 1990s, literature began to emerge tying experiences of relative deprivation to both physical and mental health issues. Bunnk and Janssen (1992) found that relative deprivation was a predictor of mental and physical health for professional working men across all age groups. Marmot (1994) examined life expectancy rates from 1965-1990, and posited that relative deprivation was one of the main influences on life expectancy in rich countries. Additionally, Benach et al. (2001) similarly found that relative deprivation influenced mortality rates from 1987-1995.

In 1996, Richard Wilkinson put forth a concrete relative deprivation hypothesis positing that experiences of feeling “less well off” than others can lead to increased stress, which can negatively affect one’s health, and ultimately, create a negative correlation between the existence of income inequality and wellbeing. His approach follows William’s (1995) application of Bourdieu’s ‘habitus’ which states that class-related habitus shapes relative health and illness inequalities. Furthering the literature on this relationship, Subramanyam et al. (2009) found that relative deprivation had an independent impact on self-reported health, as it explains “between 33 and 94% of the association between individual income and self-rated health,” (Subramanyan et al. 2009 p. 327). The positive relationship identified between relative deprivation in income and poor self-rated health supplement similar findings in previous research (see Eibner and Evans 2005; Eibner, Sturm, and Gresenz 2004; Reagan, Salsberry, and Olsen 2007; Stewart, 2006), and advance the importance of subjective knowledge in relative deprivation research. In

this thesis I will continue to utilize self-reporting to advance the role of subjective knowledge in understanding the impacts of relative deprivation.

One additional tie between relative deprivation and health is worth mentioning here. In addition to the host of health and social problems tied to relative deprivation identified above, its impacts on children's health are even more concerning. Emerson (2009) highlights the health problems associated with child relative deprivation as leading to "poorer overall child well-being," to include issues of "infant mortality, low birth weight, childhood obesity, and mental health problems" as well as behavioral problems such as "low educational attainment, dropping out of school, nonparticipation in higher education, poorer peer relations, and having been bullied" (p. 425). Finally, youth exposure to these problems is linked to adult morbidity and mortality across a variety of health problems (i.e cancer, diabetes, coronary heart disease) (Galobardes and Smith 2004; 2008). According to the World Health Organization, the concern over links between relative deprivation in childhood and health and well-being is part of the reason nation-states have shifted to focusing on reducing relative health inequalities both "between and within nations," (World Health Organization 2008).

What is particularly important about relative deprivation, is the way in which inequality eventually can manifest as both physical and mental health problems. Advances in the relative deprivation hypothesis literature (in large part put forth by Wilkinson) indicate that social problems are exacerbated by relative deprivation including "homicide, low trust, low social capital, hostility, racism...poor education performance among school children, the proportion of the population imprisoned, drug overdose mortality, and low social mobility" (Wilkinson and Pickett 2007 p. 1965). The more unequal the society, the more prevalent these conditions are. Below, Figure 1 demonstrates the relationship between inequality (calculated using the Gini

coefficient) and health and social problems, which are measured by aggregate data on: life expectancy, math & literacy, infant mortality, homicide, imprisonment, teenage births, trust, obesity, mental illness (including drug and alcohol addiction), and social mobility (Wilkinson and Pickett 2009).

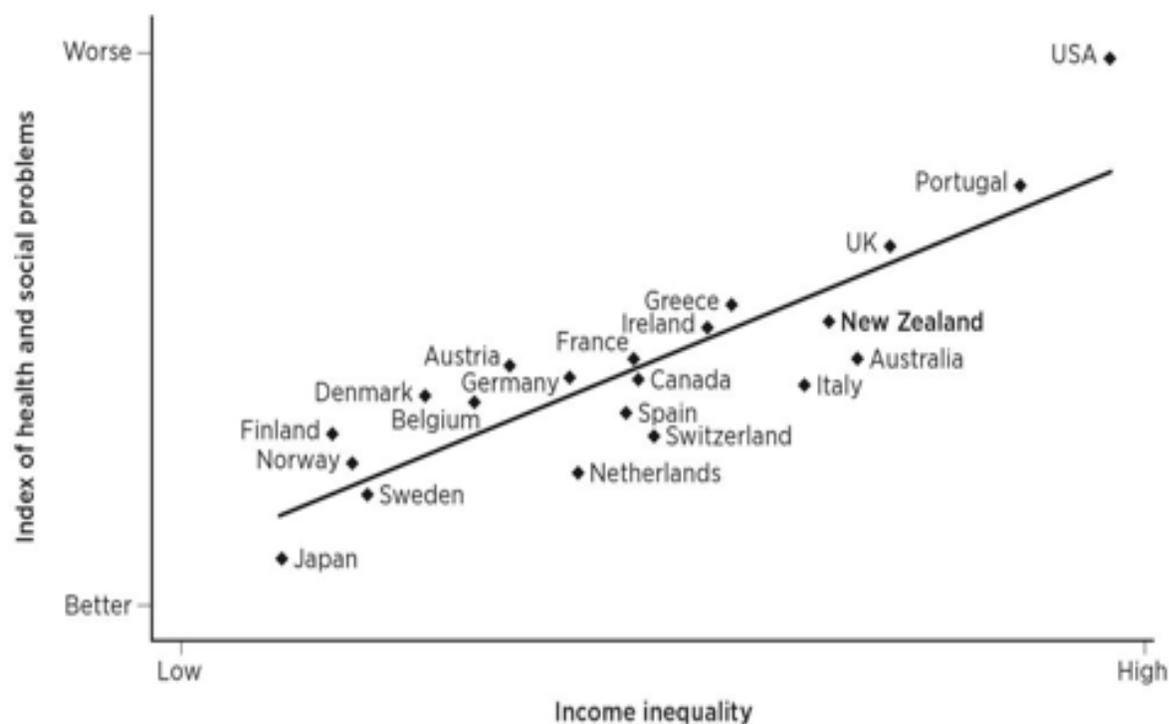


Figure 1: Index of health and social problems by nation income inequality. Reprinted from Wilkinson and Pickett 2009.

Individuals living in a nation with larger rates of inequality suffer reduced spans of life expectancy (Wilkinson 1992; 1994, Hales et al. 1999). Furthermore, the same pattern tying income inequality and mortality rates has appeared across different geographical regions within nation-states (see Kennedy, Kawachi, and Prothrow 1996, Lynch et al. 1998, Walberg et al. 1998, Chiang 1999). Yet what is it that links unequal societies to health problems and consequently an aggregate of other social problems?

Citing rises of inequality in mortality rates in Britain (Pamuk 1985, Acheson 1998) and the lack of a relationship between GDP and life expectancy in wealthy nations, Marmot and

Wilkinson (2001) suggests that material conditions alone cannot explain the impacts of relative inequality on health and wellbeing. Instead, Marmot and Wilkinson (2001) submit that there are both material and psychosocial pathways at work, particularly when it comes to the relationship between income and health inequalities. Essentially, “economic and social circumstances affect health through the physiological effects of their emotional and social meanings and the direct effects of material circumstances” (p. 1233). Relative disadvantage therefore, can be damaging not just based on a lack of material possessions, but on the psychosocial pathways through which relative deprivation impact health, namely “control over life, insecurity, anxiety, social isolation, socially hazardous environments, bullying and depression” (Marmot and Wilkinson 2001 p. 1234). Furthermore, the prevalence of psychosocial pathways influence on health and wellbeing is impacted by “the socioeconomic structure and by people’s position within this” (Marmot and Wilkinson 2001 p. 1234).

Furthermore, other signs exist that suggest the psychosocial effects of relative inequality. Greater income equality internationally and within the U.S. is “strongly associated with increased trust,” and more equality in general is associated with group membership, helpfulness, and closer community relations (Marmot and Wilkinson 2001 p. 1235). Higher rates of inequality, however, is tied to hostility, homicide, increased racism, and increased discrimination against women (Marmot and Wilkinson 2001). In fact, the U.S. 1998 General Social Survey indicated that over the previous 30 years, the income gap continued to grow, while simultaneously individuals who reported that they trusted others dropped from 55% to 35% (Marmot and Wilkinson 2001). Marmot and Wilkinson suggest then, that these issues constitute a “‘culture of inequality’ which is more aggressive, less connected, more violent, and less trusting” (2001 p. 1235). What is more, Putnam (2000) found that “social capital and economic

inequality moved in tandem throughout most of the twentieth century” (p. 359). As the burdens of lower social status and increasingly weakened social ties are the result of increases in relative inequality, an increase in negative health outcomes, according to Marmot and Wilkinson (2001), should be expected. Essentially, increasing inequality creates a more corrosive social environment that has long-lasting implications at both the societal and individual level—and simply trying to address these problems at a material level will not wholly solve these complex issues.

These recently discovered ties help to demonstrate just how important addressing relative deprivation might be for alleviating the plethora of social problems tied to poor wellbeing of individuals in a community. The findings suggest that the consequences of relative deprivation move far beyond where we began with Marx’s analogy, to serious and multiple social problems with potentially dire consequences. It seems reasonable to imagine that in an increasingly global world wherein individuals are becoming more transient and urbanized, experiences of relative deprivation may become more frequent and more disparate. This may be particularly true if those who are part of the internationally mobile class become an important reference group for individuals in this study. However, to fully understand how this relationship might develop, it is necessary to first review the literature on reference groups and reference group formation.

Reference Group Formation

A principle tenant of relativity is the existence of a comparative component. As such, relative deprivation can only be understood when speaking of individual(s) who are deprived of something that *others are not deprived of*. Essentially, reference groups occur when an individual creates a comparison between themselves and others, to serve as a point of reference for contextualizing their own situation. Yet what is it that impacts who individuals choose to

compare themselves to? To address this question, Singer (1981) grounded Merton's theory in data, noting that race, gender, education, and/or geographic proximity are central in forming reference group formation. He also suggested that individuals tend to compare themselves with those they find to be similar.

More recently, Mangyo and Park (2010) have advanced the understanding of salient reference groups, examining the relationship between relative deprivation, unhappiness and stress, and worsening health, which was first put forth by Wilkinson (1996). While conducting self-reported health surveys in China, they found evidence that supports the development of several salient reference group categories. Mangyo and Park (2010) utilized a survey "asking the respondents to rate their living standards in comparison with multiple reference groups," including relatives, classmates, coworkers, neighbors, and others "in the same county or city, the same province...and China," (p. 472). They found that across all reference groups subjective assessments of relative income equality were associated with better health (Mangyo and Park 2010). In addition, Mangyo and Park discovered that the reference groups most important to participants varied depending on whether those participants lived in rural or urban areas. For rural respondents, close neighbors were the most relevant reference group, while urban respondents' most prominent reference groups were classmates and relatives (Mangyo and Park 2010).

This finding expands the parameters of the reference group concept, and is particularly important because the authors established variability in reference group formation along rural and urban lines. Mangyo and Park (2010) assert that their results demonstrate that "future research on the importance of more salient social reference groups to health may hold great promise for improving understanding of how relative deprivation affects individual health

outcomes,” (p. 477). Thus, future research explorations must continue to explore both existing and new reference groups in order to advance understanding of relative deprivation theory. The advancement of reference groups in relative deprivation discussions, particularly understanding whether tourists may become a salient point of reference for individuals in communities with high levels of tourism, is an important goal of this research endeavor. To advance understanding of reference groups and relative deprivation, I will explore the following research questions:

1. Is global mobility impacting individual perceptions and experiences of relative deprivation and inequality?
2. Has the constant flow of international tourists through this area created a type of “global-local” reference group that extends beyond friends and family members? If so, how has a reliance on this type of reference group impacted people’s lives and their perceptions of themselves?

These questions are relevant for addressing the relationship between reference groups, relative deprivation, inequality, and social problems in a globalizing world. Here I will use qualitative methodologies to expand the depth of our understanding of these concepts, as advancing our understanding of this relationship may prove to be an integral first step toward reducing social problems and deprivation gaps.

Conclusion

The above review suggests that with greater inequality comes more social dysfunction in a society, with health problems being of utmost significance at the individual level (Wilkinson and Pickett 2007). Due to the ties that many social problems have to relative deprivation at the societal level, Wilkinson and Pickett (2007) posit that ties of inequality may run deeper than most people might imagine. Their research indicates that income inequality may be “central to the creation of the apparently deep-seated social problems associated with poverty, relative deprivation, or low social status,” and that many of these problems can be caused by social stratification, yet they can also be “amenable to changes in income distribution,” (Wilkinson and

Pickett 2007 p. 1965). Thus, the frequency of these problems is relative to the differing scales of social stratification across different societies (Wilkinson and Pickett 2007). If this is the case, Wilkinson and Pickett suggest that approaches to social problems should be more cohesive and unified toward reducing relative deprivation in society. In turn, this should weaken the prevalence of a variety of the social problems tied to relative deprivation at the same time.

The extensive reach of social problems tied to relative deprivation demand that we must continue to focus on advancing our understanding of the impacts of relative deprivation. Yet to understand the consequences of relative deprivation within a particular context, we must first be able to uncover the way relative deprivation manifests itself to those who experience it in that given context. To understand this manifestation, my thesis will explore experiences of relative deprivation and the formation of reference groups in the Mexican Yucatán Peninsula. To do so, I will examine the larger context of Mexican social policy in the context of globalization over the last few decades.

Chapter 3: Situating Poverty, Inequality, and Social Problems in Mexico: A Brief History of Mexican Social Policy

Introduction

In Chapter 2, I reviewed previous literature addressing relative poverty, relative deprivation, and reference group formation, and the way in which these relate to important social problems stemming from inequality. In this chapter, I provide a policy review that examines the way in which Mexican social and economic policies of the last several decades have attempted to address social problems, including inequality. In the context of this thesis, exploring the history of Mexico's social policy programs is important primarily for two reasons. First, this allows the reader to trace how Mexico has increased its ties internationally since the 1970s, as the country has developed and increased its ties to the global market. Additionally, Mexico's social policy appears to have exacerbated the problem of inequality in Mexico across the lifespan of several participants in this study—potentially impacting the way participants express their perceptions and experiences of inequality throughout this study.

This social policy review is organized chronologically. First, I provide a brief overview of the history of Mexico's social policies since initially addressed in the Constitution of 1917. After describing the state of Mexican social policy from the early 1900s to the 1980s, I discuss the impact that the oil crisis and resulting structural adjustment programs (SAPs) in the 1980s had on rates of inequality in Mexico. Then, I address post-SAP poverty alleviation programs and evaluate their attempts at closing inequality gaps and increasing the quality of life of Mexico's citizens.

Focusing on the government's poverty alleviation programs, I explore the extent to which Mexican social and economic policy has actually further complicated issues of relative deprivation, contributing to the high rates of inequality in Mexican society today. By tracing the history of social policy within the nation, I will be able to draw clear links between inequalities in historical and present-day Mexico and tie them into the findings of this study. As previously noted, Rosenfeld (2010) contends that there is no way to separate standards of living from particular historical conditions of a place and time, and poverty "must be understood as locally defined according to the norms predominating in particular communities" (p. 103-104). I would extend this concept and suggest that national level decision-making norms also influence our ability to deconstruct relative deprivation within a particular context. In other words, to understand the experiences and perceptions of relative deprivation in the Yucatán Peninsula today, it is essential to trace the Mexican government's historical role in creating and implementing social policy that might impact the state of relative deprivation in the context of this research. Specifically, we must highlight and analyze the Mexican government's devotion to social issues as well as the impact of their poverty reduction programs for families across the 20th and 21st centuries. In the end, I argue that the historical policies of the Mexican government have contributed to the formation and persistence of wealth gaps across the nation.

Mexican Social Policy: Early Background and General Overview (1810 – 1970s)

In Mexico, the government's devotion to social welfare issues has seesawed since its declaration of independence from Spain in 1810. As Nord (1994) puts it, the Mexican social policy pendulum swings the Government's focus back and forth between "social enhancement" and "economic growthmanship" (p. 5). As we will see, this pendulum has typically tended to swing more heavily and frequently toward economic growth. However, in the late 1920s, the

nation set out to implement policies that aligned with the social rights laid out in their 1917 constitution.³ From 1928 to 1932, the Lazaro Cardenas administration worked to advance social policies by accelerating the nation's social budget and enacting a plan that would: (1) restore *ejidos* (common land), (2) socialize secular education, and (3) create cooperatives in opposition to the industrial capitalist system (Nord 1994). Cardenas's regime offers perhaps the first glimpse of enhanced social policies from the Mexican government, which carried over into the following administration.

By passing Social Security legislation for Mexico in 1942, Manuel Camacho's administration extended the Government's focus on social policy. Yet only a selectively small percentage of the population was actually covered under this program⁴ (Nord 1994). In the decades that have followed, Mexican administrations have failed to enact consistent policies that enhance social programs and decrease inequality across the nation. Furthermore, what was previously established in writing by the constitution and countless administrations thereafter was slow to make it to practice—and any social policies which were adopted during this time period were done so in a rather piecemeal fashion. This suggests that initial policy and programming aimed at enhancing social development in Mexico lacked stability and cohesiveness.

After the end of World War II, the importance of social policy continued to wane as Government decision makers pursued industrialization (Nord 1994). During this time, the Mexican government utilized import substitution industrialization (ISI) and intervened heavily in the public sector to foster growth (Moreno-Brid Carpizo and Ros 2009). The purpose of the ISI was to “protect Mexico's domestic market for manufactures from the pressure of the competition

³ The 1917 constitution addressed several broad social issues, banning slavery and discrimination, declaring access to a state-provided education for all, establishing equal gender rights, guaranteeing citizens the freedom of speech and press, and significantly expanding worker's rights (Kirkwood 2010).

⁴ Working groups and military personnel, for example, were excluded from this plan (Nord 1994).

of imports” (Moreno-Brid et al. 2009 p. 156). In order to do this, tariffs and permits were imposed on imports, and some goods were banned from importation (Moreno-Brid et al. 2009). With this ongoing focus on ISI, Mexico’s policy “pendulum” was in full swing toward economic growthmanship.

It is important to note here that it isn’t clear what the direct impacts of the above mentioned policies were on economic disparity, as income distribution measures were not introduced in Mexico prior to the 1950 census (Nord 1994). Following this measurement implementation, however, an initial income distribution study by Kreps and Kuykendall spanning from 1958-1968 found that the position of the poorest 5-10% of Mexicans deteriorated during this time, in both relativist and absolutist terms (Nord 1994). This situation persisted over the decade, as there was virtually no change in Mexican distribution levels from the mid-1950s through the 1970s (Nord 1994). As Table 1 demonstrates, the slight change that was recorded across this time span actually indicates a slight but steady decrease in income distribution equality.

Table 1: Percentage Distribution of family income after tax, 1950 to 1975

Percentage accruing to—	1950	1958	1963	1968	1969	1975
Poorest 20%	6.1	5.0	4.2	3.7	4.0	4.1
30% below the median	13.0	11.7	11.5	10.7	11.0	10.1
30% above the median	21.1	20.4	21.7	22.5	21.0	19.4
Richest 20%	59.8	62.9	62.6	63.1	64.0	66.4
Gini index	.50	.53	.55	.56	.58	.58

Table recreated from Ginneken 1979.

In the midst of this persistent pattern of inequality, special attention was once again given to Mexican social policy during the 1960s and 1970s. In 1960, civil service workers were granted coverage under the exclusive Social Security program, and throughout the early 1960s

child welfare was addressed via protective services (i.e. providing school meals) (Nord 1994). School meal programs also enhanced the ability of the Government to address nutrition concerns, though increasing reliance on agricultural exportations actually became much more detrimental to food consumption patterns (Nord 1994). These decades not only saw continued improvements to health services and education programs offered, but a decrease in the prevalence of poverty in Mexico. Moreno-Brid et al. (2009) contend that “in its [ISI] four decades of implementation, Mexico’s per capita real GDP grew at an annual average rate over and above 3 percent...[which]...driven by the impulse of the manufacturing industry, transformed Mexico from an agrarian to an urban, semi-industrial, and the incidence and depth of poverty decreased” (p. 157). Interestingly enough, the focus on economic growthmanship in this situation increased urbanization and positively influenced rates of poverty—two factors which suggest the increasing importance of relative deprivation as Mexico continued to develop.

Unfortunately, this improvement did not cancel out the persistence of inequality in Mexico. Nord (1994) points out that these advancements were not widespread and the “scope of those who benefit[ed]” still remained overwhelmingly narrow (p. 14). Moreno-Brid et al. (2009) recognize this shortcoming of Mexico’s social advancements through the ISI as well, noting that the economic growth was *not* equally distributed and rates of poverty, though lower, remained very high. They posit that this is in part due to the fact that the social policies that accompanied the ISI were “never backed by sufficient fiscal revenues to be able to achieve the goal of universal protection of basic needs for the rapidly expanding population” (2009 p. 157). This suggests that in Mexico, social policies are often implemented in support of other national priorities—overwhelmingly the priority of economic growth. The resulting programs then are tacked on afterthoughts, and thus significantly under-funded—leaving little room for success.

Mexico's oil crisis and the structural adjustment programs (Late 1970s – 1980s)

As we move into examining Mexico's social policies in the 1980s, it is imperative to examine the following: (1) the oil crisis, (2) the structural adjustment programs (SAP), and (3) the poverty alleviations programs that followed. As we analyze these factors, the important relationship between selective access to social welfare programs and its consequences (escalating rates of poverty and inequality) becomes increasingly apparent. As mentioned, following World War II Mexico's policy prerogative was driven by domestic based-industrialization. However, isolation-like policies were chipped away at in the late 1970s and early 1980s as the drive toward economic-based liberalization was seen as a path to enhancing Mexico's development status and involvement in the global market (Moreno-Brid et al. 2009). By 1976, the Mexican government under the Lopez Portillo administration aimed to quickly move forward with "The Global Development Plan." (Nord 1994). This led Mexico into a four-year economic growth spurt⁵ referred to as the "petrolization of the development model" (Nord 1994 p. 41).

The discovery of oil reserves in Mexico vaulted the nation into position as the world's fourth largest oil exporter by 1981 (U.S. Library of Congress 2013). This boom drastically enhanced Mexico's economic and global positioning; however, the resulting economic growth was mismanaged and the nation's dependency on the oil market as a single-commodity export proved to be unsustainable (U.S. Library of Congress 2013). Under the false assumption by all parties that oil revenues and profits would continue into the foreseeable future, Mexico continued to request and receive foreign loans at an unprecedented rate (U.S. Library of Congress 2013). By mid-1981 however, demands for oil exportation dropped significantly as a result of overproduction (U.S. Library of Congress 2013). This caused Mexico to suffer major profit losses, and the nation once again turned to foreign loans. As Mexico found itself facing a US\$10

⁵ Each year economic growth was at 8%, respectively (Nord 1994).

billion debt, their deficit was compounded by not only a continued decline in oil demand, but also “the devaluation of the peso, surging inflation, a decline in employment opportunities, zero economic growth, and major business failures” which ultimately led investors and their capital to flee Mexico’s borders (U.S. Library of Congress 2013). This is significant as this economic situation set the stage for the neoliberal takeover of the Mexican economy that began in the early 1980s and slashed what little budget for poverty reduction programs existed at the time.

To address and combat the oil crisis, President Portillo followed a framework for success laid out by the IMF, which consisted of “new taxes, financial ‘reforms,’ decontrol of ‘non-essential’ items, and a general belt tightening” (Nord 1994 p. 270). Essentially, in order to begin to try and successfully recover from the crash of the oil market, Mexico found itself embedded even deeper in a neo-liberal, macroeconomic ideology. The nation undertook what was used as a common debt-crisis solution for “developing nations” at that time—a structural adjustment program (SAP). Essentially, “adjustment” in this context means that the Mexican government partook in a combination of both macro- and microeconomic reform (Summers and Pritchett 1993). Typically, an SAP strategy to increase the efficiency of resource use and augment economic growth is driven by four main goals: stabilization, liberalization, deregulation, and privatization (Summers and Pritchett 1993). As characteristic of the SAPs of this time period, Mexico’s adjustments were supported and guided by the international economic community, particularly multilateral financial institutions (Summers and Pritchett 1993). In fact, as was standard with this type of program, the World Bank and IMF funds were conditional upon Mexico’s adherence to the macroeconomic reform policies adopted by these organizations.

For Mexico, changes in economic policies were characterized by the deregulation of the market, the privatization of services, and the liberalization of finance (Moreno-Brid et al. 2009).

In addition, inflation control, labor flexibilization (resulting in employee social protection declines), and tax and pension reforms (i.e. the privatization of medical care and Social Security) were used as guides for economic stability (Bayon 2009). One result of these economic policy shifts that is particularly important for the context of understanding poverty and inequality in Mexico was the decentralization of government services. This created an “excessive emphasis on price stabilization and fiscal discipline, without any accompanying strategy for social development and quality job-creation aimed at reducing inequality, social segmentation, and poverty” (Bayon 2009 p. 303).

By the mid-1980s, Mexico’s import tariffs and restrictions had been largely removed and domestic social spending was drastically cut in order to adhere to SAP guidelines set forth by the International Monetary Fund (Laurell and Wences 1994). More reform on social spending impacted a variety of social policy programs, leading to less effective health and education services and an eradication of food subsidies (Bayon 2009). In addition, the General Coordination of the National Plan for Deprived Zones and Marginal Groups (Coplamar) was an early poverty reduction plan (introduced in the 1970s) was abruptly halted in 1983 in order for the nation to meet SAP conditional requirements (Laurell and Wences 1994). Similar policy trends continued through the late 1980s and early 1990s under the rule of Salinas de Gortari. His administration extended neoliberal policies by re-integrating foreign competition into Mexico’s domestic market, privatizing major public services (i.e., the telephone company), and amending the Constitution to privatize the nations’ ejidos, or collective farmlands (see Bayon 2009; Moreno-Brid et al. 2009).

The oil crisis and resulting turn toward neoliberalism not only slashed social policies and programs, it fueled the inequality fire in the Mexican population. That is to say, there were

distinct differences in the way Mexican citizens were impacted by this economic crisis and the restructuring that followed. Facing an already reduced standard of living for the middle class, the SAP focus on a global market economy and privatization resulted in job losses for one million Mexicans, as wage raises were held at 25% and inflation surpassed 100% (Nord 1994). Said another way, average commodity prices rose more than 100% while wage raises could not increase more than 25% in a year's time—making it difficult for those whom still had a job to keep up with commodity costs. Government workers saw a slowing in salary and benefits, the middle class saw a drop in home building, vacations, and expensive purchases (Nord 1994). Union members suffered significant losses, and the lower class, peasant, and student population were hardest hit as Coplamar and Mexican Food System (SAM) were dismantled (decreasing nutrition benefits) and tuition rates increased (limiting opportunities of social mobility). Essentially, impoverished households carried a disproportionate burden of the hardships that initially stemmed from the government's long line of economic missteps (see Table 2 below, page 28) (Laurrell and Wences 1994).

The differences in how Mexican citizens were affected by this crisis are stark. The pursuit of a neoliberal economic policy resulted in a 'regressive income distribution' wherein the second half of the 1980s witnessed a decrease in average incomes across households in every decile, excluding the richest 10% of the population which experienced an average income gain of 3.4% (Laurrell and Wences 1994). That is to say, while many Mexicans suffered, a wealthy few benefitted from these programs, increasing the economic inequality gap. By the end of the 1980s, 51% of the Mexican population was living in poverty, approximately 18 million of which were considered extreme cases of poverty (Laurrell and Wences 1994).

Table 2: Socioeconomic Effects of the Mexican Austerity Programs

Group	General Effects	Specific Policies	Net Change
Government Workers	Projects cut or delayed	Public sector good and services up in cost, public spending down 13-50%	Slowed improvements in salary and benefits
Middle Class (Workers)	Annual inflation rate over 100%, gains from 1978-81 period wiped out, reduced consumption	Taxes raised on consumption (10-15%), imports down, CONASUPO stores for the affluent	Small, less home building
Lower Class (Employed Non-Union)	Open unemployment doubles from 1982-1983	Government subsidies reduced, official minimum wage down 23%	Substantial losses, critical subsidies maintained
Lower Class (Marginally Employed)	Informal Economy absorbs more workers	COPLAMAR underfunded and dismantled	More strain on family “safety net”
Peasant (Workers)	Stagnation persists	S.A.M dismantled	More strain on family “safety net”
Peasant (Marginally Employed)	International aid may have superseded internal aid	COPLAMAR never reached population, except for some clinics	Remain “super-marginalized”
Students	Lower classes froze out reversing trend, cutbacks and closures	Tuition increases, “punitive cuts” in subsidies	Dual class system reinforced as to access to higher education
Union Members	Inflation losses not restored by wage increases	Wage increases held to 40% vs. 81% inflation	Significant but not catastrophic losses

Re-printed from Nord 1994 p. 229.

The SAP strategies of the 1980s hence continued a strong Mexican policy tradition through which (intentionally or unintentionally) excessive social polarization and inequality have rapidly increased. Inequality in Mexico has not only persisted over the better part of the 20th century, but as we demonstrated above, it worsened during the 1980s. This is despite the words of President De La Madrid, who, as he prepared to take office in 1982, noted that

When people say they have no drinking water...when you realize the indices of infant malnutrition and sickness in depressed zones, obviously you have an emotional reaction. I have reiterated that the greatest challenge facing Mexico lies in the inequalities between groups, classes, and regions of the country (Nord 1994 p. 230).

It was not until significant backlash against the ineffective 1980s SAP strategies that the government would once again turn to face the challenge of reducing poverty and inequality in Mexican society.

Mexico's post-SAP poverty reduction programs (1988 – present)

From the beginning of the Mexican government's rule, its poverty reduction programs have focused on eradicating extreme poverty, while its social protections policies have focused on ensuring social securities for individuals working in the formal labor sector. This has essentially allowed the upper-lower class and lower-middle class needs to fall through the cracks in Mexican society, and in turn, inequalities have persisted. Below I will examine the poverty reform policies of the last 25 years, consisting of Pronasol, Progresa, and Oportunidades. I will explore the way poverty reduction and social protection strategies over the last few decades have aimed to increase standards of living for Mexican citizens around the entire country, yet have achieved little success at reducing rates of poverty and inequality across the nation. The review of these policies demonstrates that despite several administrations' efforts and a return to a more welfare-state based model, poverty and inequality persist in the Mexican state today.

Pronasol—Re-focusing on poverty reduction (1988 – 1997)

Despite the mentality shift encouraging a diminished federal role in providing social services following the integration of a SAP in Mexico, there remained a need for the Mexican government to directly address the increasing rate of poverty and inequality in the nation. The first program to acknowledge and address this realization in the SAP era was the Mexican

National Solidarity Program (Pronasol). The program was introduced by President Carlos Salinas de Gortari in 1988 after years of diminishing social programs (Soederberg 2001). The main objective of this program was to enhance living conditions for Mexico's poor, with a primary focus on the construction of basic infrastructure in high need areas (Recondo 2005). However, the pursuit of this goal became complicated as the program also attempted to address issues related to education, healthcare, and production (Soedeberg 2001). Economically, the federal government's approach under this program was to redistribute federal funds to states and municipalities, the levels at which PRONASOL projects were typically enacted (Recondo 2005). In this World-Bank supported approach to poverty reduction, the state was expected to "direct its efforts toward guaranteeing a minimum social level for the poor," which is achieved via small public expenditures "carefully targeted [at] poverty programs that complement the satisfying of social needs through market and family mechanisms" (Laurrell and Wences 1994 p. 382). In other words, this program was largely a supplement to an economic policy that aimed at increasing the number of individuals who could participate in the market. In a sense, the program reflects further encouragement of the neoliberalist ideology wherein state intervention exists only at an extreme level of necessity.

As suggested, PRONASOL was designed to address common issues faced by Mexico's poor primarily within three categories—social welfare, production, and basic infrastructure (Laurrell and Wences 1994). It was explained by President Salinas as a two-tiered program that would create a baseline social floor for Mexico's citizens and would then build a "second floor, [consisting of] production and jobs in order to generate economic development options" (Laurrell and Wences 1994 p. 388). However, its ineffectiveness at even advancing the quality of life for its target demographic—the extreme poor—is demonstrated by several different factors.

First, PRONASOL lacked a focus on advancing access to sufficient nutritional diets, which is an important first step in mitigating circumstances in extreme poverty (Laurrell and Wences 1994). In terms of increasing employment opportunities for this same group, data shows that overall PRONASOL created 42,000 jobs in its 9-year span, averaging a meager gain of 5,000 jobs per year (Laurrell and Wences 1994).

While citizens may have hoped that PRONASOL would address poverty concerns in a more balanced way, its theoretical focus on selective communities experiencing extreme poverty meant that it fell victim to the same status quo set by its late 1970 and early 1980 predecessors—Coplamar and SAM. However, unlike these programs PRONASOL was not integrated into public social welfare institutions and was created as a program at the direct discretion of President Salinas (Laurrell and Wences 1994). In essence, this meant that citizens did not have a *right* to participate in the program but had to negotiate their program inclusion with the executive branch, making it even more exclusive than former social policies (Laurrell and Wences 1994). Coupled with the fact that PRONASOL's budget ranged from a pitiful .32-.69% of Mexico's GNP, the program's ability to fairly and equally address matters of poverty within Mexico has been deeply criticized (Laurrell and Wences 1994).

PRONASOL's lack of integration into the public social welfare institutions made the program political in its roots (Laurrell and Wences 1994). The program's selectivity ignored situations of extreme poverty in suburban and urban Mexico as 80% of the program's projects were launched in rural areas (Laurrell and Wences 1994). In addition, when PRONASOL aid was compared to regional development resources needs, the two did not match up (Laurrell and Wences 1994). Despite the goal of targeting regions experiencing extreme poverty, 58% of the municipalities that benefitted from PRONASOL were outside of Mexico's extreme poverty

zones (Laurrell and Wences 1994). Overall, PRONASOL only benefitted 20% of the total Mexican population living in conditions of *extreme* poverty, regardless of their location (Laurrell and Wences 1994). Once again this calls into question the unequal distribution of federal assistance, as well as the effectiveness of the program.

The selectivity of this type of discretionary program demonstrates a common theme that arose during my interviews in the Yucatán. Access to assistance programs for individuals living in poverty is highly political in a nation where government corruption is assumed as commonplace. While PRONASOL ultimately fell under the President's command, at the local level, a "Solidarity Committee" consisting of program officers had complete control over the program's local resources and their distribution. This created a multitude of social problems, particularly (1) tying unequal access to resources to political allegiance (2) increasing the extreme gaps of inequality between Mexico's rich and poor (3) furthering social discontent and (4) potentially increasing the prevalence of social problems tied to inequality and discontent.

PROGRESA—Enhancing economic support of social policies (1997 – 2002)

Following PRONASOL, the Program of Education, Health, and Nutrition (PROGRESA) was established as the next program targeting poverty eradication. PROGRESA was a "human-capital-conditional cash-transfer program" which worked to improve "education, health, and nutrition of poor families, particularly children and their mothers," (de la Fuente 2010). This was the first time since the SAP implementation that an increase in social expenditures accompanied this type of social programming. Implemented in 1997 under the rule of President Ernesto Zedillo, this social emergency program's goal was to improve "the opportunities for personal development and productive agency of the members of poor families, so that the use of these opportunities enhances their standard of living and their general social integration" (Bordi 2002

p. 209). The program was aimed at targeting all families living in extreme poverty, which by 1998 meant 14 million Mexicans (Bordi 2002). The implementation of this program marked the Mexican government's return to a welfare-state model that worked to foster community progress by specifically addressing quality medical services, cash grants for nutritional intakes, and quality education (Bordi 2002).

PROGRESA sought to increase access to basic education services and to increase school attendance and preparedness through scholarships and the distribution of school supplies (Bordi 2002). In order to reach these objectives, Mexico's social budget allocations were shifted. To enhance citizen health, the program strove to consolidate locations with medical equipment, workers, and consequently care (Bordi 2002). In addition, it aimed to balance the nutritional deficiencies faced by pregnant women, breast-feeding mothers, and children (Bordi 2002). Nutritional improvements were also addressed through the awarding of cash grants to participating families (Bordi 2002). This initial decision to focus on nutritional advancements meant that PROGRESA was immediately off to an improved start over PRONASOL in the battle against extreme poverty.

With PROGRESA, surveys on socioeconomic household characteristics were distributed, and the results were analyzed via an econometric model that attempted to objectively identify which households were living in conditions of extreme poverty (Bordi 2002). Families with lower scores on this survey were selected to participate in the program. This methodology highlights one of the biggest problems with PROGRESA, and more broadly with absolute measures of poverty as a whole. In order to determine who was living in extreme poverty, an arbitrary line was drawn wherein one family's ability to participate in the program could be denied while a family with an almost identical score but just below the cut-off could be accepted

into the program. Not only was this line drawn arbitrarily, but the “objective criteria” measured was pre-determined by the government and may very well have glossed over some key elements of poverty in different local contexts that could change the way in which families in need might best be identified.

The problem with this approach is important for two very different reasons. The first reason is that this type of individualized assistance to an area that as a whole is poverty-stricken creates deep divisions within communities of need. Through this program, families that did not qualify for PROGRESA based on their questionnaire score had the opportunity to reapply, but could not be considered for admittance until the program completed its first year (Bordi 2002). In addition, families that were not surveyed were merely able to submit a request for consideration—provided it was in written form (Bordi 2002). This requirement of course assumes the fact that a head of household in a rural (and likely indigenous) community is Spanish literate, which excludes families who do not have fluent Spanish language skills as well as families with the lowest levels of parental education. In fact, of those that did not partake in the survey, several women in one community explained that they did not participate because they did not know how to answer the survey questions (Bordi 2002). Others were either not at home when the survey took place, or were not made aware of the survey all together (Bordi 2002).

The result of this selection process, as noted by Bordi (2002), was immediate social discontent. While these feelings were in part due to the questionnaire participation discrepancies, women also explained feeling resentment or injustice because “they perceived themselves as being poorer than the ones who were selected, or...some families were selected despite not having children of school age” (Bordi 2002 p. 217). For families that did have children of school age, there were further disparities between access to scholarships and food assistance (Bordi

2002). Families received more benefits for children that attended school and fell between the ages of 6-12, and less for children outside this age range (Bordi 2002). Hence, community resentment, which according to one local mother was previously unheard of, developed in terms of the perceived community inequalities that related to receiving assistance (Bordi 2002). This suggests that despite the intentions of Mexican social programs to alleviate extreme poverty, the design may have actually fostered more disparity and discontent across a nation already struggling with large wealth and resources gaps.

Another key problem was that PROGRESA did not account for the lack of food resources within marginal (and particularly indigenous) communities (Bordi 2002). With limited access to food resources, cash grants and scholarships did not provide enough incentive for families to participate in the program (Bordi 2002) as cash is useless for proper nutrition if food isn't available for purchase. As Bordi (2002) points out in one community, San Miguel de la Labor, what was needed there was "a source of employment...as well as improved local wages, not to mention a source of clean drinking water" (p. 214). My research too reflects the uniqueness of need (as defined by local residents) in each of the six communities where I conducted research. For example, in one community a feud has been brewing for a few years between two groups who orchestrate *cenote*⁶ tours. In this community, conflict resolution, or legitimate business regulation is important to restoring equality and cohesion within a community. In another community, however, frustrations were expressed in regards to healthcare access. While the same goal—poverty and inequality reduction—may exist in both communities, the best way to achieve that goal is not the same. PROGRESA as a poverty reduction strategy was designed to provide uniform assistance to poverty stricken communities around the nation, yet unfortunately

⁶ A *cenote* is an underground sinkhole filled with freshwater and is a popular tourist attraction in the Yucatan Peninsula.

this approach and others like it are not able to address the varied expressions of need that exist in very different local contexts. I would suggest that this lack of understanding of the local context is perhaps in part why national poverty strategies in Mexico have not seen significant positive results in terms of poverty reduction or alleviation.

Another reason PROGRESA in particular may not have garnered much success is that like its predecessor, the program inclusion initially kept poverty policy's focus on rural communities. While the focus remained on rural communities and the policies were designed to provide assistance for extremely impoverished areas, the community selection process at large was based on a community's infrastructure capacity to support program initiatives (Bordi 2002). In other words, if a community could not provide the capabilities needed to sustain the PROGRESA programs, infrastructure was not invested in and the programs were not implemented in that community. While tactically this qualification undoubtedly made program implementation more efficient and cost effective, the reality on the ground was that PROGRESA became another exclusionary model of poverty alleviation, where once again, those living in the most extreme conditions of poverty in Mexico were not selected to receive government assistance despite being named the program's target population. Furthermore, even in communities that were selected to participate in the program, PROGRESA was similar to PRONASOL in that not all individuals there would receive assistance. In terms of inequality then, the reality is that the way in which participants were selected to participate in PROGRESA encouraged inequality at both the national and community level. In this way, PROGRESA became another example of a post-revolutionary political administrations' strategy to promote the idea of equal opportunity, despite the fact that many of these strategies had a questionable impact on equitable distributions of income.

Reflecting on the unintended consequences of encouraging disparity in terms of social assistance, we can once again turn back to the concept of relative poverty, wherein gaps in assistance and perceptions of injustices can diminish social cohesion and formulate social divisions (Wilkinson 1997). According to Wilkinson and Picket (2007), social divisions perpetrated by inequality are at the very core of a society's social problems. PROGRESA's attempt at reducing extreme poverty, enacted within an absolute poverty framework not only failed to meet its objectives, but created a situation where previously non-existent social strains were developed following its implementation. Essentially, the program furthered the inequalities that continued to plague Mexican society through the better part of the 1900s. According to Bayon, reductionist policies such as PROGRESA:

intensify dualism and social segmentation, but they also increase the vulnerability of all those outside the 'target population,' who have no access to social protection provided by the market...Mexico will be unable to cope with the risk of social fracture it faces today unless its economic and social development strategy is redirected toward a solidarity-based inclusive model that can not only provide for the most disadvantaged groups, but also reduce poverty, vulnerability, and the shocking differences in opportunity that so typify Mexican society (2009 p. 314).

PROGRESA's unintentional enhancement of disparity highlights the importance of addressing poverty from a relativist standpoint when we think about enhancing quality of life factors for individuals in Mexico and around the globe.

Oportunidades—More of the same (2002 – present)

In the first decade of the 21st century, Mexico has continued to implement a social welfare program that is aimed at eliminating extreme poverty, despite the little success this approach has had in the past. Oportunidades attempts to address poverty by encouraging production and employment opportunities that would afford eligible beneficiaries market access, typically through cash transfers (Levy 2008). However, these eligibility-based programs prohibit

citizens from requesting to be considered to participate in the programs (Duhau 2001; Valencia 2005; Hevia 2007). Implemented in 2002, Oportunidades replaced its poverty-reduction predecessor PROGRESA, yet still focused on the same overarching goals, namely improving health care, health education, nutrition, and access to continued education for Mexico's poor (Bayon 2009).

The cash transfers delivered under the Oportunidades banner of health and education were quite conditional, and were only meant for those referred to by Duhau (2001) as the "deserving poor" (Bayon 2009). This left "between 30 and 50 percent of the poorest quintile" of Mexicans excluded from Oportunidades (Bayon 2009 citing World Bank 2005). Furthermore, the limited access to program benefits was *once again* starkly divided for individuals living in rural versus urban areas. Of the 5 million families impacted by Oportunidades in 2006, nearly 70% were rural dwellers (Bayon 2009). This type of selective eligibility for poverty reduction programs not only increases the income and quality of life gap across socioeconomic groups, but creates a range of relative deprivation experiences that may look quite different across the rural-urban divide.

Oportunidades receives criticism for its inability to decrease inequality or reduce cases of extreme poverty based on the disconnect between the overarching program goal, and the reality of poverty in Mexico (see Bayon 2009, Moreno-Brid and Pardinias 2007). As its predecessors also did, Oportunidades aims to enhance a market economy by encouraging production and attempting to "develop beneficiaries employability in order to improve their access to various markets" (Bayon 2009 p. 306). The program is based on the assumption that when poverty-stricken individuals within the program enter the job market, they would then be capable of pulling themselves and their families out of poverty (Bayon 2009). The problem with this

assumption is its incompatibility with the reality of Mexico's labor market. First, the program lacks any sort of exit strategy which might assist individuals in entering the labor market. Second, the Mexican labor market in its current form by and large restricts the lower class from accessing formal employment opportunities (and so too social protection benefits) in the workforce (Bayon 2009). Given this mismatch between program goals and reality, Oportunidades is largely unable to move impoverished families from program dependencies to employment opportunities that could enhance both their economic status and their quality of life (Bayon 2009).

Incompatibility is also a problem for Oportunidades in terms of poverty reduction goals and program funding. Moreno Brid et al, (2009) contends that poverty reduction programs need a larger allocation of resources, but given Mexico's "insufficient fiscal revenues, inefficiencies in their allocation, and, crucially, the persistent deterioration in the conditions of employment" additional funding and resources directed toward combating poverty was and continues to be unlikely (p. 167). While authors and Mexican residents alike rightfully claim that a lack of resources is damaging to the outreach of social policies and programs, the application of social benefits and programs in a highly selective, political, and absolutist fashion share responsibility for Mexico's prevalence of inequality. The selectivity of these reduction programs is perhaps one of the biggest barriers to successful social policies, as despite program efforts impacts on long-term poverty reduction and rates of income inequality have remained high and relatively steady since the mid-1980s (see Moreno-Brid 2009).

So plaguing is the exclusivity of Mexico's social programming, Bayon (2009) describes "selective access to social services" as a persistent feature of Mexican history (p. 301). Laurell and Wences (1994) contend that selective poverty programs, social compensation funds and

social investment funds persist because they reinforce “basic neoliberal economic policies” wherein the state absolves financial and organizational responsibility for social services,” (p. 382). In this type of exclusionary model, poverty programs target only extreme poverty groups, which essentially means addressing poverty *only* when it cannot be addressed privately through “markets, family, [or] community,” (Laurell and Wences 1994 p. 382). Furthermore, as we have seen, when poverty programs have aimed to ameliorate the lives of those living in extreme poverty, even this target group of individuals can be left unimpacted. Perhaps Bordi’s (2002) core findings sum up the problematic pieces of Mexico’s post-SAP poverty alleviation programs: (1) Poverty reduction strategies designed to fit in the value framework promoted by the World Bank and IMF have little to no effect on reducing poverty in Mexico, (2) Mexico’s poverty alleviation programming, oriented toward cash handouts, forced school attendance, and utilization of health care centers has failed to address the very real and different barriers to success across the Mexican landscape, (3) the “implementation of ‘top down’ policies reduces the range of agents of social change (p. 219), and (4) “current methods of analysis of welfare and social change policies are generally divorced from a changing reality⁷,” (p. 219).

Despite attempts by PRONASOL, PROGRESA, and Oportunidades to reduce poverty, the programs acted as repetitive unsuccessful policies that focused on absolute poverty and a threshold poverty line, thus also allowing the rate of inequality to persist (see Table 3, below). This leads to a considerable level of concern, given the multitude of social problems that Wilkinson and Pickett (2007) have identified as stemming from larger equality gaps. What has further confounded inequality and relative deprivation in Mexico is the similar patterns of exclusiveness with which social protection and social security programs have been applied

⁷ This is particularly important to keep in mind as previous relative poverty literature acknowledges the fluidity of poverty.

Table 3: Evolution of poverty, 1992-2008 (percentage of population)

Poverty Type	1992	1994	1996	1998	2000	2002	2004	2006	2008
Rural areas									
Extreme Poverty	34.0	—	—	—	42.4	34.0	28.0	24.5	31.8
Poverty	66.5	—	—	—	69.2	64.3	57.4	54.7	60.8
Urban Areas									
Extreme poverty	13.8	—	—	—	12.5	11.3	11.0	7.5	10.6
Poverty	44.3	—	—	—	43.7	41.2	41.1	35.6	31.8

Abbreviated re-print from Bayon 2009. Data compiled from CONEVAL, based on the National Household Income and Expenditure Surveys 1992-2008.

across the Mexican employment sector. Below, I will briefly review and evaluate these additional programs.

Social Programming and the Mexican Labor Market in a Post-SAP Globalization Era (1980s – 2000s)

While I will not spend as much time evaluating Mexico’s more broad-based social programs, it is important to note the way in which they too have contributed to the stratification of Mexican society through the labor market. Poverty reduction and alleviation programs are only one branch of Mexico’s social policy. In addition to these programs, social security and social protection programs have also been enacted, and ultimately have also contributed to the problem of inequality in Mexico. While the poverty reduction programs are of primary concern for this paper, it is important to give a brief overview of the additional branches of Mexican social policy and address the general impacts they too have had on shaping the quality of life for Mexican citizens in the last several decades.

Just as the poverty reduction programs were orchestrated, the process for qualifying for social security and social protection programs was and is highly selective. However, unlike

poverty policy, social protective programs have been restricted to individuals who are members of the Mexican labor force (Levy 2008, See Table 4).

Table 4: Social Benefits, Income Level, and Salaried and Nonsalaried Status

Income level	Salaried Workers	Nonsalaried workers (self employed and comisionistas)
Non-poor	I. Social Security	II. Social Protection
Poor	III. Social security and Progres-Oportunidades	Social protection and Progres-Oportunidades

Reprinted from Levy 2008 p. 17.

In addition, eligibility for benefits is highly dependent on the type of labor force—formal or informal—a worker belongs to (Levy 2008). This brings us to a particular complexity when examining inequality in the Mexican context—the notions of who is poor and whom is not are heavily intertwined with an individuals’ position in the labor market. Employment (or lack thereof) is one of the strongest connections between Mexico’s market-economy model and social policy goals, and was also a component that differentiated between both low and middle class and poor and non-poor for many of the interviewees in my own study.

As noted above, throughout the 1980s, the SAP encouraged drastic cuts to social spending and also enhanced the flexibility of the labor market, leading to a decrease in formal labor participation, coupled with a growth in informal employment (Bayon 2009). Traditionally, social benefits within the labor market were reserved for only formal laborers, while informal laborers were left with little governmental support (Levy 2008). This meant that at a time when only informal labor opportunities were on the rise, many of Mexico’s social nets were only available to individuals working in the formal sector (Moreno-Brid et al. 2009). The formal sector, where employment data indicated substantial drops in employment, was the same sector that overwhelmingly provided social protections to its workers (Bayon 2009). This labor market shift then, marked a sizeable decrease in the number of Mexican laborers who were eligible for

benefits. This is another breakdown within Mexican social policy wherein Nord (1994) suggests the exclusivity of the nation’s social programming. A divide based on income is apparent as paradoxically between 1982 and 1992 Mexican wages dropped in value by 55% (Bayon 2009) while the percent of disposable income dedicated to capital steadily increased to 63% (Laurell and Wences 1994). Inequality persisted (see Figure 2 and Table 5 below)—in large part due to the restructuring of the labor market, which combined wage and benefit losses for Mexican laborers in the middle and lower class as Mexico attempted to achieve a position of higher national competitiveness in the global economy.

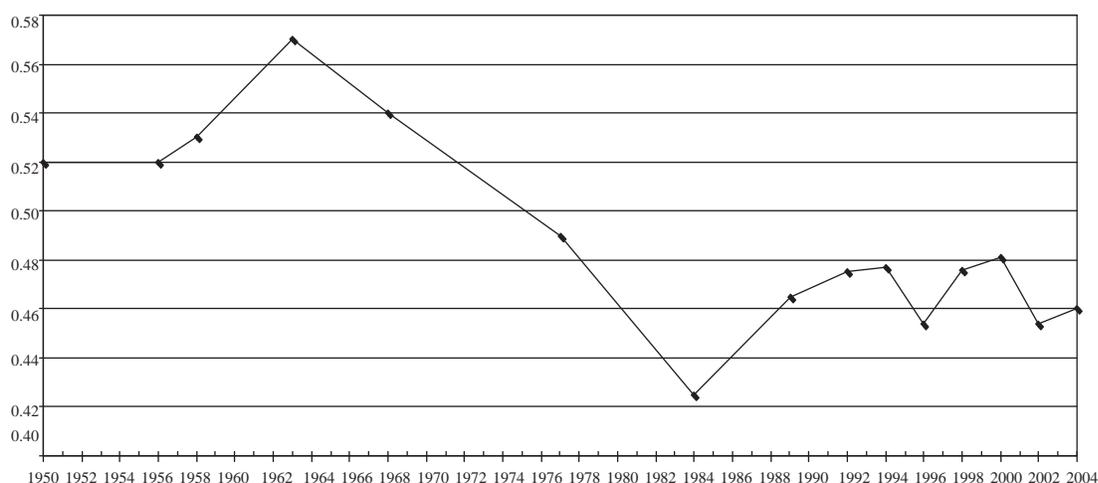


Figure 2: Inequality in Mexico 1950 – 2004 (measured by Gini coefficient) Source: Szekely 2005, Re-printed from Moreno-Brid et al. 2009)

Table 5: Indicators of income distribution and concentration, 1989-2006

Year	Share of total income	
	Poorest 40%	Richest 10%
1989	15.8	36.6
1994	15.3	35.6
2000	14.6	36.4
2002	15.7	33.2
2004	15.8	34.6
2005	15.4	35.4
2006	16.9	32.9

Abbreviated re-print from Bayon 2009. Data from ECLAC 2008.

President Salinas's 1994 signing of the North American Free Trade Act (NAFTA) marked Mexico's first involvement with formal, institutionalized trade liberalization policies, opening the door for Mexico's participation in additional free trade agreements as well as the Organization for Economic Cooperation and Development (OECD) and the World Trade Organization (WTO) (Moreno-Brid et al. 2009). It did not, however, help Mexico's ever-present labor market problems. As a combined result of the SAP, NAFTA, and overarching economic reform, employment and social welfare within Mexico were vastly altered. Employment in the *maquiladoras* skyrocketed, jumping from 650,000 jobs in 1995 to 1.3 million in 2000 (Bayon 2009). However, wages paid in these positions were nearly 40% lower than that of wages paid in typical manufacturing labor (Salas and Zepeda 2003). This demonstrates one of the key reasons that scholars maintain trade liberalization has further increased rates of national inequality across Mexico—the continuation of drastic wage reductions (Moreno-Brid et al. 2009; Bayon 2009).

The neoliberal development strategy also downsized the Mexican government's investment in the public, without creating a private sector that could fully compensate for its services (Moreno-Brid et al. 2009). As a result, the last two and a half decades of Mexican social policy as a whole has not just been associated with wage drops, but has also been seen as largely responsible for the increase in the informal employment sector, the increase in U.S. emigration, and the failure of the programs geared toward alleviating poverty and inequality explored above (Moreno-Brid et al. 2009; Bayon 2009; Laurrell and Wences 1994; Levy 2008).

Finally, Mexico's economic reform, which was supposed to set Mexico's economy on "a path of sustained and robust expansion," (Moreno-Brid et al. 2009 p. 156), essentially exacerbated the already devastating rates of social inequality and further alienated individuals from qualifying for social protections (Bayon 2009). What is particularly problematic about the

economic approach taken by the Mexican government in this context is (a) there was no social strategy of development or quality employment expansion program to accompany the emphasis on price stabilization and fiscal discipline, and (b) substantial drops in labor wages did little to address the existence of social segmentation, inequality, and poverty within the nation (Bayon 2009). Essentially, the labor market further differentiated between which citizens could access or qualify for social protection or poverty reduction programs, driving a bigger wedge between and across socioeconomic groups. By diminishing access to social services for the population at large, the rate of inequality subsequently increased in 2002 to its highest level since the 1960s⁸ (Bayon 2009). In fact, by that time approximately half of the Mexican population was considered poor, and one in five citizens were labeled as living in extreme poverty (Bayon 2009). As of 2008 the national poverty rate in Mexico remained high with 47.4% of the population considered to be living in poverty, and 18.2% living in extreme poverty (Bayon 2009).

The Unique Role of Federal Social Policy in the Yucatán Peninsula

In addition to exploring the overarching Mexican policies which shaped the socioeconomic conditions of poverty and inequality in Mexico, it is important to understand the extent to which implemented federal level development goals—focused primarily on promoting a tourist industry—has impacted the state of economic growth, poverty, and inequality across the area where our my research sites are located. Here, I will briefly review the unique context of the Yucatán Peninsula in Mexican history and the way in which federally-planned and directed tourism growth, has cultivated the tourist boom the area has been experiencing over the last few decades. Finally, I will explore the extent to which this fostered growth has had mixed results for

⁸ This is measured by the Gini coefficient, which measures a nation's inequality on a scale of 0 to 1, where 0 is complete equality and 1 is complete inequality. Mexico's score was recorded as .54 in 2002, and .52 in 1960.

economic and regional development, as the economic benefits to the Yucatán Peninsula's tourism success have been sky-high, and yet largely unevenly distributed.

Given the Yucatán Peninsula's remote location, contact with the outside world came only through the sea until mid20C (History Channel 2013). Mexican railways did not reach the Peninsula until the 1950s, and a connecting highway to the rest of the nation was not constructed until the 1960s. In fact, Quintana Roo in particular was considered underdeveloped, backward, isolated, and a "refuge for the rebellious" given the area's reputation for conflict and resistance at the time (Torres and Momsen 2005 p. 266). However, the Peninsula's vast landscapes and sparse population of rural Maya became a central area of focus for the Mexican national government in the 1970s.

As discussed previously, the 1970s marked a new era for the Mexican economy, as the nation began to turn to more outward approaches for ensuring economic growth. Accompanying a focus on agriculture and oil as market-oriented and export-driven approaches to economic development, tourism planning became a strategic economic sector (Torres and Momsen 2005). This can be traced through the formation of several different agencies focused on enhancing the tourism industry: the Fondo de Promocion de Infrastrctura Turistica (INFRATUR) , Fondo de Garantia y Fomento del Turismo (FOGATUR), and Fondo Nacional de Fomento del Turismo (FONATUR) which marked the merging of INFRATUR and FOGATUR in 1974 (Clancy 2001). The idea was actually introduced by Banco de Mexico, and was seen as a way for the government to drive foreign investment without losing total control of the market (Pelas 2011). In addition, the implementation supported Mexican development goals such as increasing Mexican jobs and enhancing development in poorer regions around the country (Pelas 2011). Based on stringent calculations and perceived benefits, planned tourism development (PTD) was

born, and the Yucatán Peninsula's own barrier island of Cancun became the nascent test-site for the federal government's investment in transforming towns into tourist resorts (Clancy 2001).

Once Cancun was selected, the Mexican government bought the remaining land on the island that it had not owned, eventually establishing the first nine hotels in the area as federally owned and operated (Pelas 2011). In addition, the federal government took on other projects to encourage private investors and foreign visitors—building a golf course, a central market, a worker city on the mainland, and restoring archeological sites (Clancy 2001). The government then attempted to further entice private investors through financial incentives (Pelas 2001). The initial endeavor was funded in part by the Mexican state government, the World Bank, and the Inter-American Development Bank, with Mexican loans from the Inter-American Development Bank totaling \$207.5 million between 1971 and 1985 (Pelas 2011). The investment goals consisted of: increasing profits, stimulating regional development, and establishing “backward linkages between tourism and other sectors of the local economy” in hopes that the investment in tourism “would not only stimulate economic development but also serve to alleviate poverty and improve the socioeconomic conditions of the region's marginalized rural Mayan inhabitants” (Torres and Momsen 2005, p. 260).

Financially, this state-led endeavor started to pay off rapidly. By 1979 there were 42 hotels and by 1989 the Cancun area became the top destination in Mexico for foreign tourists (SECTUR 1992). The profits of the tourist industry that now exists across the Yucatán Peninsula suggest that in terms of economic development, the Mexican state has successfully achieved their goal in both the initial test-project of Cancun and beyond. In fact, in 2010, tourism contributed over \$130 billion to the nation's GDP, and in the state of Quintana Roo alone, tourism accounted for over 90% of the state's GDP in that same year (Pelas 2011). As Clancy

(2001) suggests, “the primary stated goals of government officials—increased export revenues and the creation of regional employment opportunities---have for the most part been met” (p. 145). However, questions persist about just who is benefitting from this tourism success.

On the one hand, Mexico was able to keep the wealth of this endeavor decidedly in the hands of Mexican citizens. As Pelas (2011) suggests, despite the international brand names, these companies are often franchises that are owned or managed by Mexicans. In fact, Torres (2003) found that as of 1997, 86.7% of the hotels in Cancun were Mexican-owned. Yet Pelas (2011) is also quick to note that while businesses may be Mexican-owned that does not mean they are owned by Cancun locals. On the contrary, it is often the case that owners are quite concentrated—big businesses, Mexican billionaires, and industrial conglomerates (Pelas 2011). Clancy (2001) notes that “the scope of most projects, along with the manner in which concessions are granted, effectively shut off access to all but the biggest tourism developers and operators” (p. 147).

This unbalanced opportunity for investment is one of many ways that the ability for PTD to effectively address inequality has been questioned. For example, despite the ways in which local infrastructure has improved as a direct result of the federal government’s continued investment in the Yucatán tourism industry, Torres and Momsen (2005) contend that the PTD has, in many ways, further exasperated the existence of inequality in the Peninsula—particularly across more urban tourist locations and rural indigenous communities. These authors further suggest that the near-total dependency on tourism means that “striking divisions and hierarchies...are manifest in ‘layers’ of inequality and uneven development” in Quintana Roo (p.260), a problem that extends beyond the Quintana Roo state and across the entire Peninsula. In particular, the rural out-migration has led to uncontrolled urban growth, and despite higher urban

wages, higher urban costs of living have left individuals lacking access to affordable, acceptable housing conditions including basic services and infrastructures (Torres and Momsen 2005).

One issue that showed up both in the literature and on the ground was the way in which several tourist cities in the Yucatán Peninsula are essentially informally segregated. Pelas (2011), for example, notes the way in which Cancun is divided into three sections: the strip of hotels designated the tourist zone, the city area for the local government and the workers, and a third “shanty-town periphery of recently-arrived laborers in search of work in the tourism center” (p. 30). Furthermore, Pelas (2011) observes that services (i.e. waste management or water treatment) are adequately provided in tourist areas, but are strained in other areas where primarily Mexican citizens live. Similarly in Akumal, (a tourist destination south of Cancun on the Riviera Maya), Maya workers became segregated from the tourist area which had previously been the site of their palapas (Manuel-Navarrete 2012). This separation was similar up and down the coast, as the Government’s land use plans to build a Federal road segregated the locals to one side “while reserving the coastal side to hotel developers and tourists” (Manuel-Navarrete 2012 p. 25). During my time in Playa del Carmen this separation was again made clear, and one interviewee pointed out that a more in-land, periphery area of town across the highway was where (according to her) the poorest people lived.

What is particularly problematic is that the plan has successfully led to urban in-migration in the area as migrants within the Yucatán Peninsula move toward the “regional tourist poles” to fill labor opportunities in low-skill labor positions within the tourism industry (Carte et al 2010). The current system is charged with “creating new relationships of labor exploitation between tourism management elites and low-wage service workers” (Carte et al 2010 p. 703). Furthermore, while some workers have received employment benefits, Torres and Momsen

(2005), and Re Cruz (2003) found that these benefits were distributed unevenly based on race, class, and education levels. Of course, there are more people migrating into these tourist towns than there are employment positions available. However, as the tourism sector has continued to grow as a part of the area's economy, other labor sectors, in particular agriculture, has dropped substantially (Carte et al. 2010). As many rural dwellers from even further distances are leaving their communities behind for opportunities in the urban tourism industry, the labor markets are essentially saturated (Carte et al 2010). The migratory influx means less, and less desirable opportunities for employment, with little to no option of finding viable employment through other means. As Carte et al. (2010) put it, "While the tourist pole of Cancun takes from the rural periphery, in the form of cheap labor, it has provided very little in return."

It is clear from the above discussion that authors tend to disagree about the extent to which PTD has helped or harmed individuals and their quality of life in the Yucatán Peninsula. Yet there is seemingly no one that would argue that without the heavy-handed involvement of the Mexican government the tourist industry there would not be what it is today. Outside of the state's intentions, it appears that to a certain extent the Mexican government's commitment to tourism promotion (both around the nation and in particular within the Yucatán Peninsula) has largely benefitted the wealthy while leaving the poor and marginalized populations once again in the dust. In other words, the tourism-promoting policies have also contributed to the vast inequalities that exist in Mexican society, and particularly in communities within the Yucatán Peninsula. The resulting unequal development and distribution of income and resources most certainly plays a role in understanding relative deprivation across the six communities of focus in this particular study.

Conclusion

The advances and setbacks within Mexican social policy reflect a widespread policy problem—while many have benefited from an enhanced quality of life due to national social programming, progress has been extraordinarily slow and segmented, and the programs have excluded far too many citizens. As a result, vast inequalities persist. While overall rates of extreme poverty and need have decreased, Mexico continues to advance “the same old exclusionary model” while pursuing development policies that are “based on export processing zones and abundant, cheap labor” (Bayon 2009 p. 313). This approach continues to divide Mexican society and has done virtually nothing to address problems of relative deprivation related to inequality. Given the prevalence of inequality within Mexican social policies and programs, it is easy to understand both (1) why studying inequality is particularly relevant within Mexico and (2) how participant experiences of national social policies might impact their responses to questions of poverty and inequality.

It is imperative to keep the Mexican government’s social policy decisions in mind as we examine experiences of relative deprivation and the formation of reference groups, as these are the policies that have been implemented during the lifetimes of the participants. Thus, the national policy not only sets the context for the study, but has likely impacted the lives of individuals in this study and influenced the way in which they themselves have formed perceptions of poverty and inequality. Complicating the participants’ perceptions and experiences of relative poverty further is the role that ethnic identity has played in differentiating their experiences with national poverty policies and relative deprivation. This is a topic that is particularly important in the context of this research, and one I will return to in the *Population* subsection of the subsequent Methods Chapter.

This chapter traces important historical markers in the history of Mexico's social policy that are essential to understanding the state of poverty and inequality in Mexico throughout its continued development process. Specifically, it examines the way in which the national government has increased inequality across Mexico despite various attempts at addressing social problems and poverty rates. These policies, particularly the unique investments in the Yucatán Peninsula and PTD, have coincided with Mexico's increased global activity, further calling into question the relationship between relative deprivation and reference group formation in a globalizing world. To explore the way global mobility (stemming from increased globalization) has impacted inequality, relative deprivation, and reference group formation in Mexico, I chose the Mexican Yucatán Peninsula as the region where I would conduct my research. In the next chapter, I explain the process of selecting my research sites, and offer a description of each community.

Chapter 4: Research Sites

Introduction

In Chapter 3 I reviewed Mexico's social policies over the last several decades, focusing particularly on the government's approach to poverty alleviation. This is important in the context of this study as it highlights Mexico's increasing participation in the globalized world and traces the extent to which policies adopted by the Mexican government furthered the nation's problem of inequality. In this chapter, I will examine why Mexico, the Yucatán Peninsula, and the six communities I selected are relevant sites for addressing my research questions. In addition, I will describe each research site in order to contextualize participants' lives and experiences in each community. I begin with a discussion of Mexico's unique positionality in the developing world. I then address the extent to which the Yucatán Peninsula's dependency on tourism creates a regional area of interest relevant for this thesis work. Finally, I discuss the site selection of the six individual communities that served as research sites in this study. First, however, I will explain the methodological process that guided my adoption of particular research sites in this study.

Adhering to methodological processes

With a clear understanding of the theoretical and methodological approach to this research, I undertook the task of choosing research site locations⁹ where I could conduct semi-structured, in-depth interviews. Given that my research aims to understand the impact that daily transnational interactions have on people's perspectives, it was necessary for me to have several different research sites where varying levels of interactions with tourists exist and are comparable to one another. In addition, I also considered Rubin and Rubin's (2012) suggestion that it is imperative to choose a research site based upon four factors: (1) relevance to the

⁹ For an overall map of Mexico and the Yucatan Peninsula and detailed maps of each research site, see Appendix 2.

research problem, (2) ability to gain access to participants at the site, (3) the ability for the site to allow you to test contrasting and tentative explanations, and (4) to help you decide the extent to which your findings apply elsewhere. For a map of the six research sites, see Figure 3.

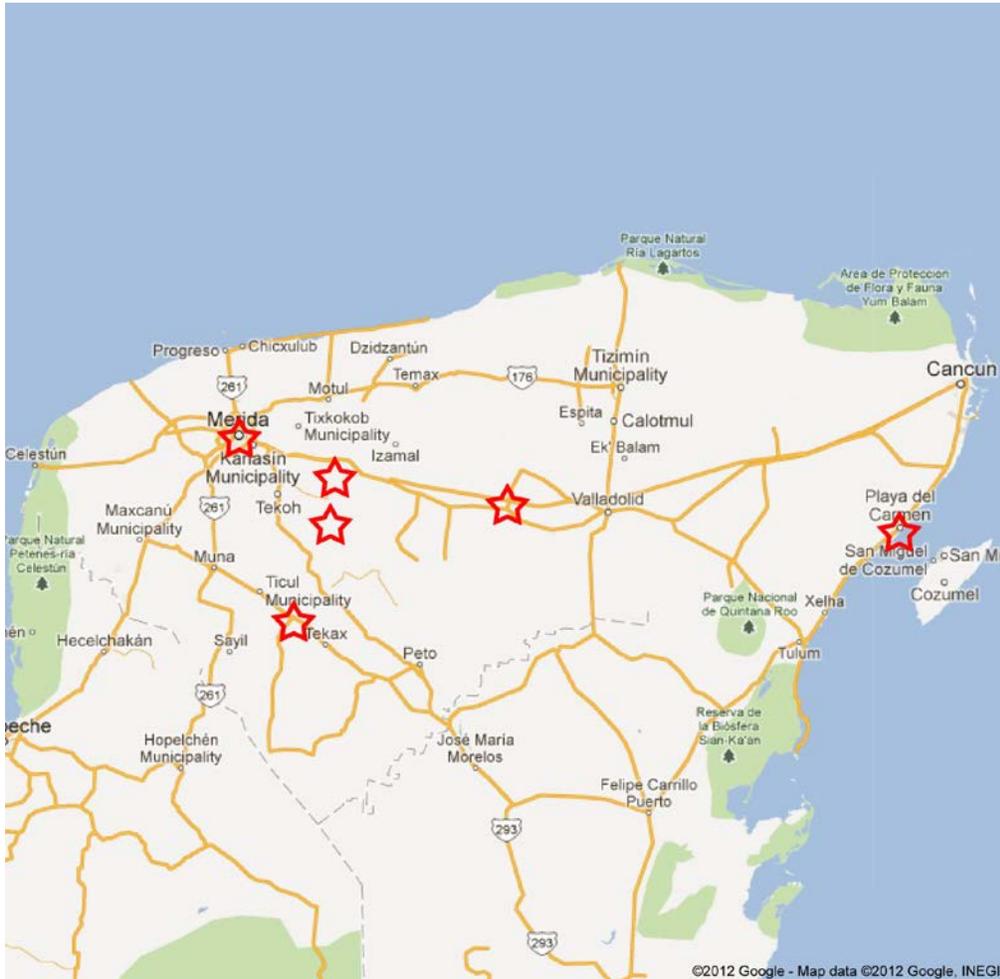


Figure 3: The six research sites selected in the Yucatán Peninsula, Mexico. Printed from Google Maps 2012.

Choosing the Mexican Yucatán Peninsula¹⁰

The World Bank classifies Mexico as an upper-middle-income nation (U.S. Dept. of State 11/20/2011). However, despite growth and improvement, approximately 44% of Mexico's population is living below the country's poverty line (U.S. Dept. of State 11/20/2011). The few individuals who live lavishly well raise the standard of living rank that the nation as a whole

¹⁰ See Appendix 2.1 and 2.2 for a map of Mexico and the Yucatán Peninsula.

receives while a true economic representation would highlight the vast differences in living standards that actually exist. This is demonstrated through the Inequality-adjusted Human Development Index (I-HDI), as when inequality is considered, Mexico’s adjusted HDI drops by 23.5% (HDR 2011). Essentially, the achieved quality of life for Mexico as a nation is artificially inflated 23.5% on the HDI due to uneven wealth distributions across classes and individual households (HDR 2011). On the 2011 HDI, Mexico ranked 57th. When adjusting for inequality, its rank would fall to 72nd. This rank reduction is the fifth highest of all nations, just below Columbia, the U.S., the Republic of Korea, and Venezuela (HDR 2011). For illustration, see Table 6 below.

Table 6: Nations with highest and lowest total loss when accounting for inequality

Country	HDI Rank	HDI Value	Inequality-adjusted HDI			Quintile Income Ratio	Income Gini coefficient
			Value	Total loss (%)	Rank Change		
Norway	1	0.943	0.89	5.6	0	3.9	25.8
U.S.	4	0.91	0.771	15.3	-19	8.5	40.8
Rep. of Korea	15	0.897	0.749	16.5	-17	4.7	n/a
Slovenia	21	0.884	0.837	5.3	7	4.8	31.2
Finland	22	0.882	0.833	5.6	7	3.8	26.9
Czech Republic	27	0.865	0.821	5	9	3.5	n/a
Mexico	57	0.77	0.589	23.5	-15	14.4	51.7
Venezuela	73	0.735	0.54	26.6	-16	10	43.5
Columbia	87	0.71	0.479	32.5	-24	24.8	58.5

In addition to high rates of inequality, to study the foreigner as a reference group it was essential that the research sites provide space for international interactions. For the purpose of this research, Mexico’s reputation as a tourist destination meets this criteria. The U.N. World Tourism Organization (UNWTO) ranked Mexico as the 10th most popular international destination in 2010, noting that the nation recorded 22.4 million visitors (UNWTO 2010). Of the ten most popular destination cities (measured by percentage of visitors and hotels), six of these

cities are in the Yucatán Peninsula (Raveable 2012). Of the top twenty destination cities, the Yucatán Peninsula is home to eleven (Raveable 2012). Hence, the Yucatán Peninsula is a Mexican haven for those who are part of the globally mobile population. Given the changing face of the people living and visiting this area, as well as the close proximity of rural and urban communities, the Yucatán Peninsula provides a plethora of research sites for understanding the impact that cross-cultural interactions have on individuals' perceptions of self, relative to others.

Discussion of site selections

Many of Mexico's labor opportunities are in the Yucatán Peninsula, where exposure to foreign tourists is becoming increasingly common. In addition, many citizens local to the Yucatán Peninsula migrate to work in the U.S. and Canada. Thus, Mexican communities within the Yucatán Peninsula are a perfect crossroad in which to study impacts of global-local interactions. Within the Yucatán Peninsula, I selected six research sites that represent communities of varying population sizes where inequalities and exposure to a more global community differ greatly (see Tables 7 and 8). The six sites selected were: Mérida, Chunkanán, Seyé, Oxkutzcab, Pisté, and Playa del Carmen. Below is a discussion of how each research site was selected in this study.

Table 7: Household and health demographics by research site

Research Site	Municipality	Population Municipality ¹¹	% Population Maya	% Covered by health services	% Households have flooring
Mérida	Mérida	830,732	23%	75%	27%
Chunkanán	Cuzamá	4,926	96%	61%	24%
Seyé	Seyé	9,726	64%	60%	24%
Oxkutzcab	Oxkutzcab	29,325	93%	69%	22%
Pisté	Tinum	11,421	95%	67%	22%
Playa del Carmen	Solidaridad	159,310	27%	62%	28%

Statistics from INEGI 2010.

Table 7: Household and health demographics by research site (continued)

¹¹ These estimates are from Instituto Nacional de Estadística y Geografía (INEGI), based on 2010 statistics.

Research Site	% Households have a toilet	% Have access to public water supply	% Have access to Electricity	% Households have TV	% Households with washer	% Households with computer
Mérida	26%	26%	27%	26%	22%	12%
Chunkanán	16%	23%	24%	23%	13%	.08%
Seyé	16%	20%	24%	23%	15%	1%
Oxkutzcab	20%	23%	23%	21%	15%	3%
Pisté	17%	22%	22%	20%	12%	2%
Playa del Carmen	29%	29%	29%	27%	19%	9%

Table 8: Major differences across selected research sites

Research Site	Population ¹²	Municipality	Rural/Urban	Observed Economy	Level of Tourism
Mérida	1,000,000	Mérida	Urban	Business and Commerce	Med-High
Chunkanán	350	Cuzamá	Rural	Tourism	Med
Seyé	9,000	Seyé	Rural Suburb	Maquiladora, dayworkers in Mérida	Low
Oxkutzcab	29,000	Oxkutzcab	Rural	Agriculture	Med-Low
Pisté	5,000	Tinum	Rural	Tourism	High
Playa del Carmen	150,000	Solidaridad	Urban	Tourism	High

Before entering the Yucatán Peninsula, I was able to confirm Pisté and Oxkutzcab as definite research sites. Upon my arrival, I chose Mérida and Chunkanán as initial research sites that not only served to refine the semi-structured interview, but became important in their own right as additional research sites. I also added Seyé as a research site as it was necessary to include a community that is not saturated with foreigners. At present, there is no tourism industry or source of tourist-related income within the community of Seyé. Finally, Playa del Carmen was the last research site to be added to this study. While Pisté receives as many (if not more) tourists on a daily basis than Playa del Carmen, Pisté has not conformed to the Western development ideals in the way that Playa del Carmen has. In Playa del Carmen, the community has transformed itself to not only be a tourist destination, but to meet and exceed any and every desire vacationers may have while they are there. From restaurants to nightclubs, shops to

¹² These estimates are aligned with community estimations, which are up-to-date in 2012.

vacation adventures, Playa del Carmen is the only research site that represents the complete inundation of both Western business and international tourism with the Yucatecan culture.

Essentially, all six of the above research sites met the criteria for becoming “realistic sites” (Marshall and Rossman 2011). That is, entry was possible (due to both my relationship with translator Jamie Emilio and their proximity to my homebase in Mérida), a high probability existed that “a rich mix of the processes, people, programs, interactions and structures of interest” were present, trusting relations in at least four sites could be built through relations with the gatekeeper, and overall collecting data from these sites meant I was able to ethically gather information that enhanced the quality and credibility of my study (Marshall and Rossman 2011 p. 101).

Research Site Description 1: Mérida, Yucatán, México¹³

Mérida is a city of approximately one million people, and is the capital of the Yucatán state in Mexico (Yucatán Living 4/26/2012). It is in the Northeastern part of the state of Yucatán, approximately one hour south of the gulf coast city of Progreso. It is the largest city in the state, and is the 12th most populous metropolis in Mexico (INEGI 2010). Mérida is a sprawling city, with urban, suburban, and rural areas in every direction from *el centro* (the town center). A friend of a friend’s family home in this location served as my jumping off point for this research endeavor. The city was selected as my base for convenience—not only did I have a family home I could stay in for a very affordable rate, but my translator Jamie Emilio also lived in this city. Finally, as the capital city of the Yucatán state, Mérida is a large and relatively well-known point of reference from which it is easy to contextually locate the remaining research sites.

El centro’s historic charm is the main point of reference for visitors. Here, countless buildings from the colonial period are still standing. A historian’s dream—the Catedral de San

¹³ Research sites are presented in the order of which they were first visited.

Ildefonso—tends to be the show stealer. The cathedral, erected in 1598, is the oldest one in the continental Americas and is still open today. In addition to the historical markers, the ease with which Mérida can be used as a starting point to countless attractions is, I suspect, one of the key reasons it draws tourists.

Mérida was not initially selected to be a research site, and in fact the interviews conducted there were serving the purpose of refining the interview schedule. However, over the course of interviews across all research sites, utilizing the interviews from Mérida made more and more sense. As a large city in Mexico, Mérida has been exposed to interactions with a “global other” through corporatism; McDonald’s, Starbucks, Chevrolet, Wal-Mart, and TGIFriday’s are just a few examples of the American companies that have thrived in this city. I wondered: What sort of impact on perceptions of wealth and inequality could the normalization of these companies have for individuals in Mérida? In addition, since Mérida is one of two urban locations in this study, its inclusion lends itself to understanding the extent to which the rural/urban divide delineates people’s thought patterns about wealth, poverty, and inequality.

Research Site Description 2: Chunkanán, Yucatán, México

Chunkanán is a small village of approximately 350 residents, 90% of whom live in indigenous Mayan households (INEGI 2010). The *pueblo* (village) is nestled in the heart of the Yucatán state of Mexico, just a few minutes away from the municipality of Cuzamá (pop. 5,000 [Nuestro Mexico 2012]). It is 50 kilometers southeast of Mérida, and is reachable from there by car in approximately 45 minutes (Google Maps 2012). It is 17 kilometers south of Seyé, another study site. The pueblo developed as a *hacienda*, a large estate of land that was utilized for the production of henequen. The leaves of henequen are processed into fiber and transformed into rope (Yucatán Living 4/17/12). Though the hacienda was abandoned and henequen harvesting

ceased after the machinery was destroyed by Hurricane Isidore in 2002, many descendants of hacienda workers remain in the village where *cenote* tours have now become the main economic source for the community (Yucatán Living 4/17/12). A *cenote* is an underground water formation where tourists can relax, swim, and capture unique natural beauty in the Yucatán Peninsula (Yucatán Living 4/17/12). The *cenotes* at Chunkanán are just five minutes past the Cuzamá Municipality.

In Chunkanán there are three *cenotes*. In order to reach them guides whisk tourists down a track in horse-drawn wooden “trucks.” The open-air wooden platforms and track were once used for henequen production, and provide a unique mode of transportation to the tourist attraction (Yucatán Living 4/17/12). This tour was developed by a local who formed a *cenote*-tour cooperative within the Chunkanán community (Yucatán Living 4/17/12). The economic state of the community is very dependent on *cenote* tourism, and it is greatly improved during the high tourist seasons.

In the pueblo, the only non-resident buildings I observed were (1) a small structure with a palm thatched roof with plastic tables and a jukebox where I was able to buy a water, (2) a cramped convenience store overflowing with snacks and batteries, and (3) Restaurant El Dzapakal, a large gray stone fixture with a cathedral style palm-thatched roof—the latter creations to appease any tourists visiting the *cenotes*. Hence while the pueblo is somewhat dependent on tourism, it is not equipped to handle large numbers of visitors at once, nor is there a place for individuals to stay overnight.

In order to reach Chunkanán, many tourists have to pay someone in Cuzamá to transport them to the hacienda by motorcycle-carts (motorcycles with wooden carts attached on the front for seated space). This employs a small number of individuals (5-15 people), and at least during

the time I spent there, the owners and operators were exclusively male. It is not clear what most of the individuals do for employment if they do not work in the *cenotes* because the soil is not good for growing crops. There are several other small pueblos nearby, and it is possible that residents may work in other towns. At least one of these towns is home to a large textile factory that produces garments for a U.S.-owned company. In addition, some interviewees discussed commuting to Mérida for work at one point or another in their lives.

Some interviewees cited disparities between families within the village. They identified these differences primarily in terms of the materials in housing construction. For example, some of the houses are mud huts with woven palm tree roofs. Others are made from stone slabs, and others still appear to be tin. According to *Nuestro Mexico* (2012), all of the 86 households have flooring, and only 19 are one-room houses. In addition, all but two households are equipped with sanitation installations, 75 are connected to and can access the public water supply, and 81 homes use electricity (Nuestro Mexico 2012). Essentially, almost every household is able to meet their basic needs. However, when we move beyond basic needs, inequality is more pronounced: only 69 households have one or more television sets, 32 (less than half) own washing machines, and just one household has a computer (Nuestro Mexico 2012). Within the community, I counted only five or six motor vehicles. These disparities indicate that inequality does exist here, though it may not be as pronounced as in larger communities.

At the time I visited Chunkanán, there was another rift in the community that participants frequently wanted to talk about. According to the interviewees, a few years ago the mayor of Cuzamá (the neighboring town you must pass through to visit Chunkanán) recognized that his community was not benefitting from the tourism that the *cenotes* were bringing to the area (Yucatán Living 4/26/12). Since the *cenotes* were technically on *ejido* (public land) the Mayor

determined that they were the property of both Chunkanán and the *comisario* (municipality) of Cuzamá (Yucatán Living 4/26/12). He created his own work force and developed a separate point of departure for *cenote* tours. These tours conveniently begin closer to the town of Cuzamá and main road from Mérida, and at times block tourist access to the entry point at Chunkanán. During my time there, men with red flags waved vehicles into a designated parking area at this initial entry point. This diversion has caused a further economic strain for the individuals working within the original cooperative at Hacienda Chunkanán. Again, the theme of Mexican political intervention exacerbating inequalities emerges, this time at the local level.

I selected Chunkanán because it represents a mid-gradation of interaction with foreigners—while the main economic source is from tourism, the operation is extraordinarily small, and the community is in a very rural location that is a little difficult for uninformed tourists to reach. In addition, not all visitors are foreign, as this is a popular place for individuals living 45 minutes away in Mérida. The addition of this site provided an understanding of the interplay between locals and foreigners in a very small, rural village on the outskirts of a major city.

Research Site Description 3: Seyé, Yucatán, México

Seyé is a Mayan pueblo approximately 35 kilometers southeast of Mérida (Google Maps 2012). By car, Seyé is reachable from Mérida in about 40 minutes. The village has approximately 9,000 residents¹⁴ (INEGI 2010), many of whom commute to Mérida daily in order to work. Though it is very close to Mérida, the pueblo itself is rural and is not exceedingly developed. At one point, the pueblo harvested henequen fibers for rope, as in Chunkanán (Van Bodegraven, 2012). This brought a small number of outsiders and tourists to the area, but today

¹⁴ This is according to the 2010 census. When I traveled there in January 2012, residents suggested the population had grown and was roughly between 10,000 and 12,000 people.

the daily lives of the residents of Seyé do not involve interactions with tourists. For some, their daily interactions do not move past their neighbors and family members within the village. In terms of employment, one source of household income within the community is a *maquiladora*¹⁵ that is located near the village center. Like Chunkanán, the most visible sign of wealth differential was the type of material used in household construction. This was demonstrated by one participant who prided herself on what she recognized as a privilege within her group of friends—her floor was concrete, not dirt.

Seyé was selected as a research site that is representative of the least intense level of interaction with foreigners or outsiders (essentially little to none). However, it is important to note that the community may still be influenced by foreign culture as many work in the commercialized city of Mérida, and some residents have been or are still connected to the global trade market, whether through henequen or garment production. In my research, Seyé was essentially the site I could identify (particularly given project constraints) as having the least interactions with foreign tourists. While this limits the conclusions I will be able to draw following data analysis, it also demonstrates how pervasive Western tourism and influence truly are in the Yucatán Peninsula.

Research Site Description 4: Oxkutzcab, Yucatán, México

The city of Oxkutzcab [pronounced Osh-cootz-cab] has just over 29,000 residents (INEGI 2010). It is 106 kilometers south of Mérida, and is reachable from Mérida by car in approximately an hour and a half (Google Maps 2012). Oxkutzcab runs along the Northeastern edge of the highlands, giving it a very diverse landscape in comparison to the other research sites selected. The land in Oxkutzcab is extraordinarily fertile, so crops that are used for family

¹⁵ A maquiladora is an export processing zone wherein “raw materials and components are imported for manufacturing or assembly, and finished products re-exported—chiefly to the United States—subject only to value added tax” (Bayon 2009).

consumption, domestic sales and exportations are grown here in this area. It is most well-known for its production of oranges.

In addition, there is a small tourist attraction on the outskirts of the municipality, a Mayan cave called Lol-tun. Near the top of the tourist entrance, there is a tiny, open-air restaurant and one lone hotel. Of the six research sites I chose for this study, this is the most challenging for tourists to reach. Essentially tourists would have to either have a car with them or rent a car to get to this specific place. There may be buses to the central Oxkutzcab municipality, but there are certainly not ones that take people anywhere within walking distance of this tourist attraction or the crop fields. While it is true Oxkutzcab's location is rural and distant from any major city, its population and town size make it feel less rural than Seyé, for instance, which has a smaller population but is less than half the distance from Mérida.

Many of those in Oxkutzcab who work in the fields and/or Lol-tun have also been employed as migrant laborers in the United States. This is not only apparent in interactions with individuals, but through meandering around the municipality itself. On one street corner, a mural depicts the towering red arches of the Golden Gate Bridge, with "Plaza California" scrolled in red and yellow just above it. In addition, in the town center there is a large outdoor recreational area with a domed roof. It houses a basketball court, and was built for community use in 2009. Its construction was in part funded by "hermanos Yucatecos de Oxkutzcab residents en San Francisco Ca.," or the Yucatecan brothers of Oxkutzcab who live in San Francisco.

I chose Oxkutzcab as a research site because, while there is tourism here, it is not the main source of income for the area. The economy here depends on agricultural production, and so individuals in Oxkutzcab are tied into the global economy not just through tourism, but through the international food production system. In addition, given former Oxkutzcab residents

have created a sub-community within a major city in the United States, transnational interactions for these individuals could potentially occur in three contexts (1) interactions with tourists in their hometown, (2) interactions with individuals in the Global North wherein they themselves are the foreigner, and (3) indirect interactions as products pass through global commodity chains. Hence, in comparison to other research sites I may be able to understand how several confounding types of interactions with foreigners influence Yucatecan perceptions of relative deprivation and inequality.

Research Site 5: Pisté, Yucatán, México

Pisté is located approximately 119 kilometers east-southeast of Mérida (Google Maps 2012). It is roughly an hour and a half drive from Mérida to Pisté, and rests near the center of the Peninsula. Pisté is a rural village with approximately 5,000 residents. It is part of the Tinum municipality which has just over 11,000 residents (INEGI 2010). The village is significant because it is the closest town to Chichen-Itzá, a popular Mayan archeological site where one can find *El Castillo* (The Castle), named one of the “New Seven Wonders of the World” in 2007 (Chichen-Itzá 4/26/12). From the parking lot of Chichen-Itzá, the town center of Pisté is less than a 6 kilometers drive (Google Maps 2012). From Hotel Chichen-Itzá (which is actually a Best Western) the distance is closer to 2.5 kilometers (Google Maps 2012). This is the hotel that I stayed in for a night, and is the place of employment for nearly half of the individuals interviewed at this research site.

The city of Chichen-Itzá was finished in 900 AD, and at the time was a regional capital within what is now considered the Yucatán state (Chichen-Itzá 4/26/12). Tourists have been visiting the archeological site since the late 1800s, but traffic increased initially in the 1920s when a highway was built leading to the site (Madeira 1931). Today, Chichen-Itzá is a UNESCO

World Heritage site, and its most distinguishing feature is the pyramid central within the remains of the town—“El Castillo” (Chichen-Itzá 4/26/12). The pyramid stands close to 100-feet high, towering over tourists and Mayan handicraftswomen peddling their wares. The ruins at Chichen-Itzá make it the second most popular archeological site in Mexico, bringing in over 1.2 million tourists in just a year’s time (SECTUR 2012).

Both within and immediately outside of the archeological area are Maya selling crafts and souvenirs. At the ticketed entrance, there are more souvenir shops and vending carts, these are headed by “official” Chichen-Itzá staff. There is even a small station where bus tickets can be purchased. This area is packed with people from around the globe, standing shoulder to shoulder and equipped with visors, sunscreen, and cameras. I chose Pisté/Chichen-Itzá as a research site because individuals living around the archeological site have constant interactions with and exposure to foreign tourists. In this study it would be considered to be at the high-intensity end of local-tourist interaction. Yet the location is a more remote rural setting, and while easily accessible to tourists, the town itself still only has a small, primarily Mayan population. These differences in population size and development relative to Playa del Carmen (which sees similar exposure levels to tourism) will help uncover the way in which rural settings, development levels, and tourist interaction levels impact the formation of reference groups and perceptions of wealth and inequality.

Research Site 6: Playa del Carmen, Quintana Roo, México

Playa del Carmen is in the state of Quintana Roo. It is approximately 65 kilometers south of Cancun along the coast of the Mayan Riviera (Google Maps 2012). Playa del Carmen (Playa) continues to grow at a rapid pace. Of the 160,000 people living in the Solidaridad municipality in

2010, approximately 150,000 of those were residents of Playa del Carmen (INEGI 2010). Playa is an urban area and one of the most popular tourist areas in all of the Yucatán Peninsula. Its rise as a resort town and destination hot spot is in large part due to its location. The island of Cozumel is a 45-minute ferry ride from the shores of Playa, and is world renowned for its scuba diving locations (Yucatán Living 4/26/12). Playa and Cozumel are so close that on the right day when the sun hits a certain spot, you can see the faint outline of buildings glimmering across the waters. Since Playa is the best access point to Cozumel and cruisegoers at port in Cozumel can easily cross to Playa, tourist appeal continues to increase. In addition, Playa is just a 45-minute drive south of Cancun and has been a refuge for vacationers after Cancun suffered major hurricane damage in 2005.

During the day in Playa del Carmen, tourists can soak up the sun on the sand, walk the souvenir-lined streets to search for the perfect hammock, or travel to nearby adventure parks and Mayan ruin sites. In the evening, restaurants and bars come to life on the infamous Quinta, or 5th Avenue. Music cuts through the air while patrons dance the night away until four or five in the morning, sometimes until the sun comes up. Quinta Avenue—from the Burger King to Starbucks, the bus terminal to the pier, the souvenir shops to the department stores, the hotels to the bars, and the diving companies to the adventure booths—is the heart, soul, and life of the city. While the community and government want to maintain this charm and avoid growing to rival the size and sprawl of Cancun—employment opportunities continue to draw in Mexicans searching for work and the city itself continues to draw in domestic and foreign tourists (including those who never leave).

I selected Playa del Carmen as a research site as this is a location where local individuals are continuously exposed to and constantly interacting with foreign tourists. This location

represents the highest level of interaction with foreigners, as it is a popular urban vacation destination. By interviewing those within the service industry in this location, I can identify how these intense interactions impact the way locals think about wealth and equality, and determine whether or not foreign tourists become a salient reference group for individuals who interact with them more frequently than other Mexicans or even their own family members.

Conclusion

Of particular importance when attempting to compare cases is the ability to “test contrasting and tentative explanation” (Rubin and Rubin 2012 p. 53). This means it was important for me to have research sites that were as diverse as possible (Rubin and Rubin 2012). All six of the research sites demonstrate different ways in which transnational interactions intersect with ethnicity, gender, age, occupation, community size and makeup, and ties to the tourism. By choosing these sites, I gained a better understanding of the phenomenon of transnational interactions. In the end, this approach to research site selection left me with data from extreme ends on the “interaction with foreigners” continuum, allowing me to have more confidence that the results describe a potentially broader phenomenon. Even though generalization is not a driving goal of this study, a variety of focused, complementary and controversial experiences from interviewees across diverse sites increases the balance of the interviews and enhances the research credibility (Rubin and Rubin 2012).

In this chapter I described my research site selection process and the relevance of these sites in relation to this study. I began by discussing my methodological process for research site selection, and then discussed the importance of Mexico and the Yucatán Peninsula in the context of my research questions. In addition, I provided a detailed profile of each community that

served as a research site in this thesis. In the following chapter, I will discuss the qualitative methodological approach that guided the rest of my research process.

Chapter 5: Methods

Introduction

In Chapter 4 I introduced the research sites I selected for this study, and their relevance for addressing my research questions. In this chapter I discuss the qualitative methodological approach that guided my research process. After re-stating my research questions and a brief discussion of relative deprivation, I discuss the way in which my theoretical orientations shaped the development of qualitative methodologies used in this study. In addition, I describe in detail the processes of selecting research sites and populations to sample, data collection, and data analysis. I close by reflexively exploring the influence of my own position within the context of this research, and addressing methodological challenges and limitations of the study.

This research aims to address the following questions:

1. Is global mobility impacting individual perceptions and experiences of relative deprivation and inequality?
2. Has the constant flow of international tourists through this area created a type of “global-local¹⁶” reference group that extends beyond friends and family members? If so, how has a reliance on this type of reference group impacted people’s lives and their perceptions of themselves?

To address these questions, I conducted semi-structured qualitative interviews with individuals linked to the global economic system in different ways. I conducted 64 interviews across six communities. During the interviews I asked participants to discuss their perceptions and experiences of deprivation relative to others in their community, in Mexico, and in the global

¹⁶ The concept of a reference group has been previously defined in this thesis; however, it is understood as a group that is used as a point of self-comparison for individuals. A “global-local” reference group addresses a comparison group wherein either (1) foreign individuals infiltrate a community’s local context, or (2) an individual enters a new local context as a foreigner.

sphere. This is relevant as it addresses Ravallion's (2008) notion that relative deprivation may become increasingly more important in the developing world as we see an increase in access to basic needs and resources. In addition, there is a dearth of studies that directly address the impact that cross-cultural reference groups may have on conceptualizations of relative deprivation. As opportunities for geographic mobility increase for individuals worldwide, the importance of expanded reference groups, particularly in cities acting as global hubs, is likely to grow.

Ravallion (2008 p. 14, emphasis mine) states that:

It would seem reasonable to assume that people living in poor areas tend to have more limited knowledge and experience of the full range of levels of living found in the society as a whole. Someone living in a poor village who has gone no further than the county town, will undoubtedly rate her economic welfare higher than someone with the same real income living in a city, who sees far greater affluence around her. *In these circumstances, heterogeneity on the frame-of-reference will translate into corresponding differences in perceived welfare.*

While Ravallion (2008) develops this assumption as potentially problematic for his statistical analysis, he simplifies precisely what one might suggest regarding the nature of this research study. That is, utilizing an individual or group as a point of reference whom is much more economically well off than we are likely will have a detrimental effect on our perceptions of our own economic welfare. If this is true, we would anticipate that individuals in urban areas would actually experience relative deprivation to a larger extent than rural dwellers. In addition, we might posit that in an urban tourist hub, deprivation gaps between individuals and those with whom they interact with and compare themselves to might lead to increased perceptions of relative deprivation. As we will see when reviewing the results of this study, that this was not necessarily the case.

While we know that inequality and relative deprivation matter, the ways in which they matter to individuals in a rapidly changing world nevertheless remains unclear. Developing a

better understanding of relative deprivation and its relation to a changing face and concept of community will contribute invaluable qualitative depth to the relative deprivation hypothesis that, until now, has remained relatively unexplored. This research examines the impact that increased daily interactions with a global “other” (tourists) have on community members in the Yucatán Peninsula. It provides insight into how relative deprivation is framed within the “developing world,” what its impacts are, and how we can more holistically combat the negative consequences of relative deprivation and social inequality. In order for me to do this, it is essential I utilize a constructionist paradigm as a part of my methodological approach.

Philosophical Underpinnings: Why Qualitative?

The value of qualitative methodology in social inequality research has often been overshadowed by the emphasis on formulating the most appropriate econometric approach to poverty measurement. However, qualitative research is required to address how deprivation is perceived and defined by individuals first hand. Current research on relative deprivation indicates that increased inequality intensifies the prevalence of social problems, yet we cannot fully understand this pattern without understanding what relative deprivation and inequality subjectively mean to individuals (Marshall and Rossman 2011). According to Ambert, Adler, Adler, and Dettzner (1995) qualitative research seeks to “acquire in-depth and intimate information about a smaller group of persons,” and “to learn about how and why people behave, think, and making meaning as they do” (p. 880). In this case, utilizing qualitative research methods provides the means for gaining a better understanding of local definitions and perceptions of deprivation and well-being. It also serves as the only way to understand local emphasis on deprivation and potential solutions to the problems it can cause.

While the advantages of utilizing qualitative research are limitless, there are some additional reasons I advocate for the use of qualitative research in this particular study:

1. The ability to delve in-depth into complexities and processes
2. Researching little known phenomena
3. Researching novel, ignored, or often marginalized populations
4. Researching a phenomenon for which relevant variables have yet to be identified (Marshall and Rossman 2011 p. 91).

As qualitative research is less frequently referenced in studies focusing on relative deprivation, there is much to be gained by undertaking a qualitative approach to uncover information that supplements the value of what has been learned from statistical measurements of deprivation (Marshall and Rossman 2011). In order to examine the formation of a global-local reference group, I need to explore how individuals discuss their lives in comparison to “others” (and unearth just who those “others” are). This focus on perception and experience, coupled with the dearth of research on a potential global-local reference group, is why in this case discovery-oriented, qualitative, semi-structured interviews provide the best methodology for uncovering new information related to relative deprivation in the Yucatán Peninsula.

Accessing Research Sites and Sample

As is typical, the first obstacle for me to overcome when selecting research sites was selecting locations where I could easily gain access to participants. At the time I was developing my research proposal, I was also taking private Spanish lessons. My Spanish tutor was aware of my research intentions and he proposed his hometown of Mérida as a base for the study. He informed me that he had a childhood friend who worked as a trilingual (Spanish/Mayan/English) guide and translator there. After some research to locate his friend’s contact information, I sent an entry letter email (Marshall and Rossman 2011) to translator Jamie Emilio Perez, whose vital role as a gatekeeper and translator in this study will be discussed at length at a later point. For

now, it suffices to say that this connection tremendously eased my ability to access participants across four of the six research sites.

Sample and Sampling Techniques

As described above, the six community sites include: Mérida, Seyé, Chunkanán, Pisté, Oxkutzcab, and Playa del Carmen. The advantage of engaging with members in these locations is that all of the communities have different levels of exposure to the global economic system. Individuals' engagements, interactions, and experiences in this system appear to be markedly different. Thus, these sites add insight to the way in which different experiences in the global economic system in a local setting shape world views, conceptualizations of relative deprivation, and reference group formation. To understand these experiences, I used qualitative sampling strategies, which are the most effective at developing understandings of "complex issues related to human behavior" (Marshall 1996 p. 523).

I recruited participants verbally, using snowballing techniques. Relying heavily on snowball sampling techniques, I was able to access interviewees that offered a diversity of experiences relevant to the questions I was asking. Snowball sampling is defined by Biernacki and Waldorf (1981) as a sampling technique wherein participants are identified "through referrals made among people who share or know of others who possess some characteristics that are of research interest" (p. 141). This does not mean, however, that utilizing snowball sampling allowed me to sit back and watch the participants flow in. Snowball sampling, like any other methodological technique, is chosen and maintained by the researcher (through "initiation, progress, and termination" [Biernacki and Waldorf 1981 p. 143]). While this technique helped me gain access to a hidden population, I did have to work through some problems Biernacki and Waldorf (1981) identify with the use of snowball sampling: ensuring participant eligibility and

controlling the participant chain path. In one instance, I had to turn down potential female participants that were under the age of 18; in another, I had to exclude a male because he had only been living in the city that was a research site for one month. Given that many questions address community issues, I felt he may not be able to provide extensive community insights.

Biernacki and Waldorf (1981) note that as data gathering begins, it is “purely exploratory and the goal is simply to get started” (p. 154). A researcher begins by contacting those he or she knows that are part of the population to be studied. This is how my own research began, with the help of the host-father I was staying with in Mérida. I wanted to begin doing interviews in order to process and revise interview questions immediately. I interviewed six individuals that to some extent fit the population profile, though it was also in a community that I had not initially intended to conduct interviews in. I continued to utilize referrals for two more interviews in this location.

After my initial use of snowball sampling, the referral chains were more specifically developed around individuals working in the tourist industry at other research sites. In addition, I controlled the referrals by balancing (to the best of my ability) referrals of men and women in each location. By the end of my time in the field, I was conducting selective interviews in the last two communities (Pisté and Playa del Carmen), which held populations that were of most importance to me based on the research conducted at previous sites. At this point, the participant selection was narrowed to include individuals who had clearly experienced the phenomena of transnational interactions I was interested in. Hence, the referrals utilized through snowball sampling narrowed the focus and selectivity of my sample, and drew on theoretical considerations more and more as the research progressed. Yet as Biernacki and Waldorf suggest, I was careful to also limit the number of individuals who came from a particular subgroup so as

not to overrepresent a subgroup in a sample. For example, I conducted eleven interviews in Playa del Carmen, four of which (approximately one-third of the sample) came from one sampling network (workers at the same restaurant).

Potential subjects in Chunkanán, Seyé, Pisté, and Oxkutzcab were identified for recruitment based off of translator and tour guide Jamie Emilio Perez's previous knowledge of residents in those communities. Not only did Jamie Emilio Perez serve as the translator for this research endeavor, he acted as a “gatekeeper,” or the individual who was able to provide me an “in” (Marshall and Rossman 2011) to the population in the communities where we conducted interviews together. It was only through his knowledge of the communities and residents that I was able to gain access to these communities and the individuals who agreed to participate in this study.

I traveled with Jamie Emilio and met with his acquaintances in each community. After discussing the project with his acquaintances and conducting initial interviews, I utilized snowball sampling to identify more community residents to participate in the research project. Essentially, I identified additional participants through the connections established with the initial participants. So, initial participant contacts recommended other individuals (frequently co-workers) to become potential participants in this study, then those participants recommended others, and so on (Vogt 1999). Jamie Emilio and I would discuss the nature of the research project with the potential participants; we would inform potential participants that they had no obligation to participate in the project, and that there were no consequences for refusing to participate in the project. In addition, Jamie Emilio and I discussed potential risks that could develop from their participation in the research project and the participants were informed that if they choose to participate they may opt to end the interview at any time.

Partnering with translator Jamie Emilio in four sites, I conducted 64 in-person interviews with consenting adult participants. Jamie Emilio and I would obtain participation consent verbally before the interview began.¹⁷ Inclusion criteria consisted of: being over 18 years of age and a community resident in the study location for what I subjectively considered an established amount of time. Initially I tried to only include residents who had been living in a community for a minimum of five years. However, it became clear in some locations (i.e., Playa del Carmen) that individuals moved too frequently for this to be an acceptable criterion. As the focus of this study incorporates the fluidity of people, it seemed inappropriate to keep this criterion in place.

In Mérida and Playa del Carmen, I still followed the ethical procedures discussed above; however, different sampling techniques were used to identify participants. Mérida was the first site where I began conducting interviews. Jamie Emilio was not ready to begin the project with me upon my immediate arrival to Mexico. This resulted in the use of a temporary translator to conduct convenience sampling in Mérida, meaning that I selected the most accessible individuals to interview (Marshall 1996). This began with two women who worked for the translator's sister and brother-in-law, and the remaining four participants were recruited as we walked through the *centro* area of downtown Mérida. While convenience sampling is criticized for producing a lack of quality data and intellectual credibility, in this case constraints of access to participants, time, and money made it necessary to begin fieldwork interviews through the use of convenience sampling (Marshall 1996).

In communities with a focus on tourism, most, if not all individuals who I asked to participate were those who were employed in the tourism industry and worked in a position where daily face-to-face interactions with tourists were common. In this way, my participant selection process also utilized purposeful sampling (Marshall and Rossman 2011). Using this

¹⁷ For a copy of the verbal consent form, see Appendix 3.

method I identified tourist industry employees as a community subgroup that would be the most productive sample and would allow for cross-site comparison regarding my research question (Marshall and Rossman 2011 and Marshall 1996). This was particularly true of my sampling strategy in Playa del Carmen. Without the assistance of a gatekeeper or translator, I recruited participants in Playa del Carmen alone. By this point, I was advanced enough in the research to utilize purposive sampling to obtain the most productive sample possible (Marshall 1996 p. 523). This is not to suggest that I completely abandoned snowball sampling techniques as I continued to ask participants who they knew that might want to be interviewed. Indeed, this successfully led to referrals on at least two occasions. In addition, this is not to suggest that purposive sampling was not utilized at any of the other research sites. Excluding the convenience sampling in Mérida, a more accurate description of my sampling technique is that a combination of purposive and snowball sampling were utilized to recruit participants in five of the six research sites included in this study.

The strategies I used in this research reflect the process through which sampling strategies typically evolve. Upon first entering the field, I was not informed enough in terms of the research site and the populations to be able to employ advanced sampling methods. However, as I refined my research and interview questions and developed a clearer understanding of the sites and populations I was able to begin collecting data in a more logical and systematic manner (Marshall and Rossman 2011). Through systematic sampling and this documentation of the process of sampling evolution, the credibility and transferability of this study should be enhanced for readers (Marshall and Rossman 2011). In addition, the inherent logic behind the cross-comparisons of the selected research sites should become increasingly evident (Marshall and Rossman 2011).

All participants from each research site were drawn from the respective local populations (For an overview of the sample demographics across all research sites, see Table 9).

Table 9: Sample demographics by research site

Research Site	N	Male	Female	Ethnicity Maya	Ethnicity Maya - Mestizo	Ethnicity Spanish Mexican	Ethnicity Unknown	# working in tourism
Mérida	6	3 (50%)	3 (50%)	6 (100%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)
Seyé	12	5 (42%)	7 (58%)	12 (100%)	0 (0%)	0 (0%)	0 (0%)	0 (0%)
Chuncanán	7	6 (86%)	1 (14%)	7 (100%)	0 (0%)	0 (0%)	0 (0%)	6 (86%)
Oxkutzcab	12	9 (75%)	3 (25%)	12 (100%)	0 (0%)	0 (0%)	0 (0%)	8 (67%)
Pisté	16	10 (63%)	6 (37%)	15 (94%)	1 (6%)	0 (0%)	0 (0%)	11 (69%)
Playa del Carmen	11	9 (82%)	2 (18%)	4 (37%)	0 (0%)	3 (28%)	3 (28%)	11 (100%)
Total:	64	42 (66%)	22 (34%)	57 (89%)	1 (2%)	3 (5%)	3 (5%)	36 (57%)

Despite my best efforts at controlling the sampling chain in each community, roughly two-thirds of my participants were male. While this undoubtedly reflects my ability to engage with female participants, it also reflects more general patterns of the accessibility of females within these communities, and perhaps even Mexican culture as a whole. Though it was not initially planned, given the history of peoples in the Yucatán Peninsula, the overwhelming majority of participants (57 of 64) were also of Mayan descent. As Mexican Maya have and continue to experience poverty and inequality at higher rates than their non-indigenous counterparts, and are largely represented in this research, it is imperative to explore the relationship between Maya ethnicity, poverty, and inequality, and what that might mean for understanding the results of this study. In the following section, this relationship will be reviewed and explored.

An Important Note about the Research Sample: Understanding ethnicity in the Yucatán Peninsula and in the context of this study

In order to understand the diverse outcomes in a society, we must “unpack” not only the state, but also the society (Fox 1996). The Yucatán Peninsula is a diverse region of Mexico that

is home to migrants from Northern Mexico and plays host to a plethora of tourists who come in waves for short-term stays (Faust et al. 2004). It is estimated that of the approximately 4 million citizens of the Peninsula (INEGI 2010), well over 700,000 of these citizens are Yucatec Mayas (Faust et al. 2004).

Globally, poverty and inequality are inextricably tied to ethnicity, and these patterns hold true for both Latin America (where the highest levels of income distribution inequality in the world are found [Poole, Gauthier, and Mizrahi 2007]), and Mexico. In 2004, Fuentes and Montes uncovered these disparities, finding that indigenous Mexican groups have greater problems with poverty, illiteracy, gender equity, and access to basic infrastructure. While these statistics do suggest a striking diversity across ethnic lines in Mexico, we must not forget that the social boundaries of ethnicity across the country—and particularly across the Yucatán Peninsula—are blurred and ambiguous at best.

While throughout this thesis there are several references to the Yucatec Maya, it is important to point out that these references are for the ease of understanding the historical and ethnic contexts that the research is situated in. However, this is not to say that Mayas as an ethnic group, or even the Yucatec Maya possess a particularly cohesive ethnic consciousness, as experience of ethnicity can vary across class, community, and individual interactions. Early Maya accounts by Redfield (1941) suggested the opposite, that Mayas lived quite cohesively as a population, Yet more recent research has contradicted this finding, as Yucatec Maya differ in terms of their “dialect, local history, and degree of acculturation to Hispanic Mexican life” (Faust et al. 2004 p. 2). According to Armstrong-Fumero, research has identified ways that indigenous communities and microregions have their own cultural markers, which “runs counter to assumptions of a homogeneous ethnic identity that encompasses all Yucatec-speaking people”

(2009 p. 304). In addition, cross-community clashes and intra-community inequality pre-dates the arrival of the Spanish (Faust et al. 2004). Even today, differences in culture and prosperity still permeate individuals in Yucatec Maya communities (Faust et al. 2004).

In understanding the Yucatecan culture, Faust et al. say it best: “In short, generalizations are difficult to make in Yucatec country” (2004 p. 3). In fact, Yucatec Maya diversity encompasses assimilated immigrants from Spain, China, Korea, Lebanon, Africa, and northern Mexico (Faust et al. 2004). This brings us to two important questions in the context of this research: (1) How is Maya ethnicity understood and defined in the context of the Yucatán Peninsula, and (2) How am I defining Maya ethnicity in the context of this research?

While phenotype is one indication utilized to distinguish between Maya and non-Maya Mexicans, the physical traits seem to be less important in making this distinction than more culture-based characteristics, such as dress, place of residence, or language abilities (see Faust et al. 2004, Gabbert 2001, Armstrong-Fumero 2009). Findings from my own research support the importance of traditional culture and locale in determining whether or not an individual will be perceived as “genuinely” Maya. I will briefly examine these qualifiers, and then move on to addressing the way in which both state and society place contradictory requirements on individuals who claim a Maya heritage.

Cultural qualifiers and imposed contradictions of being Maya

In the Yucatán Peninsula, there are clear lifestyle and attitude distinctions between urban dwellers and those who live in rural communities. Perhaps who suffers the most from this divide is the suburban population, individuals who live in a “rural-feel” community on the outskirts of a major city, but are dependent on that city for employment opportunities. Armstrong-Fumero (2009 p. 302) notes that for rural-dwellers, “Outside of their home community...[they are]

exposed to forms of urban discrimination that tend to characterize people from the pueblos as homogeneously poor and uneducated ‘indigenous people.’” He goes on to say that this stereotyping derives from the fact that “wealthy indigenous people in Mexico have historically been assumed to have assimilated into the culturally and racially hybrid national society and simply stopped being Indian,” (Armstrong-Fumero 2009 p. 302). I experienced this discrepancy first hand during two interviews in Mérida. Two of the interviewees were young women that performed labor for the same individual. One woman lived in a nearby village, while the other lived in Mérida. The woman who lived in a nearby village wore the traditional ipil, spoke rarely and quietly, while the other woman wore a t-shirt from the popular “American Eagle” brand name and spoke confidently and frequently. Following the interviews, the translator and I discussed the responses of the two women. While both women’s physical traits suggested that they were of Maya descent, Oswaldo consistently praised the interview with the more “modernized” woman while insulting the more traditional woman’s intelligence level. Through her assimilation to the Hispanic-Mexican lifestyle, dress, language, and city, the “modernized” woman essentially lost her Maya identity.

As suggested, the role that the rural-urban divide plays in defining ethnicity in the Yucatán Peninsula is not only about the physical space an individual inhabits, but the cultural traits that accompany that inhabitation. This is particularly true as not all rural communities in the Yucatán Peninsula are always identified as Maya communities (Stephen 1997). Stephen (1997) found that “indigenous agrarian communities are characterized by their ‘cultural traits and organization and conservation of these, and by their language, which is a basic characteristic identified with indigenous communities that constitutes an integral part of all culture.” He describes non-indigenous communities as ones that have “lost a significant part of their cultural

roots, don't use any particular kind of identifying clothing, and which do not conserve their mother tongue except among a few elderly" (p. 26). In this context, Maya identification depends solely on how much an individual or a community continues to retain traditional aspects of their ancestor's culture—in a world where the state and society encourage them to conform to Hispanic Mexican culture and the Spanish language. This creates a complex situation wherein historically Mayas have been pressed to adapt to the Hispanic-Mexican culture (and are able to achieve social mobility more easily if they do), yet in order to qualify for the few benefits that do come from a Maya ethnicity, individuals must prove they are "Maya enough."

In large part, the 20th century policies of the Mexican government encouraged assimilation throughout Maya communities. According to Stephen (1997), the push for the Mexican Maya to become a part of the mainstream Mexican culture was handled through policy that utilized "paternalistic institutions and programs that would help indigenous peoples to learn Spanish, increase their levels of education, rise out of poverty and become constructive citizens in building the Mexican nation" (p. 16). I would argue that the predominant focus of the initial poverty alleviation programs on indigenous regions is an extension of this push toward assimilation, which aligns in part with the notion that many authors conclude regarding these programs—that they are more of a method utilized to retain social control than to alleviate poverty.

While an assimilation agenda was put forward in the 20th century and cultural adaptation still changes local perceptions of the "Mayaness" of an individual, another challenge to Maya ethnicity is also raised. Residents must answer to whether or not they are authentically Maya, or what I term, "Maya enough." While on the one hand the notion is encouraged that in order to break free from the barriers of being Maya individuals must conform to Hispanic Mexican

culture, at the same time individuals are told by the government and the public that in order to receive benefits designed for indigenous persons, they must prove that they are ethnic, indigenous, or Maya enough. For example, as is discussed at length above, poverty alleviation programs are typically tied to rural, Maya communities. So, in order to benefit from these programs, individuals must conform to traditional Maya wares, customs, and languages.

Armstrong-Fumero (2009) demonstrates the way in which the Mexican public reinforces the government's message that people of Maya descent must desert their Maya identity to be successful, but cling to it to receive assistance in enhancing their quality of life. In Chichen-Itzá, Armstrong-Fumero (2009) found that questions continue to be raised about the true ethnicity and nativeness of the vendors who have begun to sell souvenirs within the walls of the historical Maya site. That is, the success that individuals are having by taking advantage of the market created on their own land is being questioned in terms of its legitimacy. In fact, there is actual disdain for the individuals who find success in this business, as rural Maya apparently are not supposed to be able to achieve success. I experienced this mentality first hand through a conversation with my translator. He informed me that many of the people who were vendors inside Chichen-Itzá were not from Pisté (the local town), but moved here en masse in order to take advantage of the new market that has accompanied Chichen-Itzá's growing popularity. Though this is a claim that is wide-spread, Armstrong-Fumero (2009) found this to be untrue. Even if it were to be true, however, are indigenous peoples not entitled to benefit from the profit made off their ancestors' dwellings?

Thus, the concept of Maya in the Yucatán Peninsula is quite muddled. In addition, there is a mix of pride (typically among higher educated Maya who use bilingual skills to their advantage) and embarrassment (for low educated, older Maya) in ancestral heritage. The rise of

tourism to Maya ruins has further obfuscated feelings of being and self-identifying as Maya in the region. The difficulty of defining Maya is well laid out by Faust et. al. (2004 p. 3) when they ask “What does one call a person of Maya descent who is proud of her or his Maya heritage, but lives in a city, works at a white-collar job, and speaks English and Spanish daily, in addition to the native Maya?”

Compounding these difficult questions is that a direct acknowledgement of clear racial and ethnic categories seems quite taboo. As a White American Female, the identification of race as a demographic category does not seem particularly threatening or abnormal. Yet when I first mentioned this question as it appeared on the interview guide, my host father insisted that this question could not be asked. We talked and talked about a way in which it could potentially be rephrased, as his reaction was that a direct question of race is offensive. Yet, we could never reconcile this question in an appropriate way. Given that this question was perceived as harmful or insulting and that Mexico does not have clear defining lines to identify race or ethnicity, I excluded any questions of race or ethnicity from this study. Yet I can say that the rural research sites I used were considered by the translator to be predominantly Maya communities.

It is imperative to discuss the predominance of Maya participants in this sample, as indigenous cultures around the world have suffered decades (if not centuries) of oppression and discrimination. The Mexican Maya are no exception to this type of tumultuous indigenous history. It is quite likely that the results of this study draw in part on this heritage, and that the findings could be quite different if the majority of participants were Spanish-Mexican. This issue will be further addressed in the limitations section of the *Discussion* chapter. However, the historical as well as contemporary experiences of Mexican Maya, the ways that these experiences differ from their Spanish-Mexican counterparts, and the way in which these

experiences might impact perceptions of inequality and relative deprivation should be kept in mind as I move through the data collection, analysis, results, and discussion below.

Research Methodology: Data Collection

In alignment with a constructivist approach, I selected in-depth interviewing as my primary methodological tool for this research endeavor. A common tool for conducting qualitative research is the in-depth interview, which can be envisioned as “‘a construction site of knowledge’ where two (or more) individuals discuss a ‘theme of mutual interest’” (Marshall and Rossman 2011 p. 142 citing Kvale & Brinkmann, 2009, p. 2). In-depth interviews consist of open-ended “grand tour, example, and experience” questions (Spradley 1979), which in this case allows participants to express their conceptualizations of relative deprivation and important reference groups, as well as their perceptions of their position in relation to those reference groups.

Interviews can be subcategorized, and in this case my interviews are considered to be “topical” or “guided” (Rubin and Rubin 2012). The use of topical interviews, which engage participants on a small number of issues and allows them the freedom to frame and structure their own response, draws directly on a key assumption in qualitative research: An interviewee’s perspective on a certain phenomenon must emerge in the way that the interviewee actually sees it (Marshall and Rossman 2011). I engaged participants in in-depth, semi-structured interviews to give them the opportunity to speak freely about social issues of their choosing while also discussing the particular phenomena of transnational interactions and inequality. As the purpose of this study is focused on subjective viewpoints that demonstrate participant perspectives on the phenomenon of relative deprivation, these semi-structured in-depth interviews represent an

appropriate methodological approach and were my sole method of collecting data (Marshall and Rossman 2011).

Individual interview questions stemmed from the theoretical basis of reference group theory and previous research methods designed and used to determine self-proclaimed class positionality. In addition, I included family demographic questions to gain a better understanding of the way that intersections of gender, employment, and family size, impact participant responses.¹⁸ Finally, interview questions also addressed perceptions of community problems and poverty, and inequality in an attempt to uncover the types of problems that community members see and how those relate to poverty, inequality, and relative deprivation. The interview guide was flexible and altered frequently throughout the first half of the interviews. At approximately the halfway point, the interview questions seemed to clearly address the topics I wanted to uncover, and so were only occasionally altered after this point. Throughout the interview process, additional questions were added as interesting topics emerged from many interviews (Charmaz 2006).¹⁹

My ability to elicit the information I was looking for within the interviews proved to be a difficult hurdle. Two problems in particular stand out in my mind as the most challenging to overcome. In some interviews, neither of them could be overcome. First, the initial interview guide included different ‘graphs’ of societies, attempting to demonstrate more or less equality within a society. Whether due to a translation error, or interviewee misunderstanding, the use of these graphs were a source of confusion. After failing to demonstrate usability around interview ten, this technique was discarded. Instead, interviewees were simply asked if they thought that most people were in the “top, middle, or bottom position” in society, and to explain their answer.

¹⁸ As mentioned previously, because of the marked racial history of the research sites, questioning participants about their race was considered highly inappropriate and was therefore omitted from the set of interview questions.¹⁸

¹⁹ See Appendix 4 for initial and final interview guides.

This question was posed four times to address their perceptions of class when “society” was defined at four different societal scales: their community, their state, Mexico, and the world.

A second difficulty was that people were not forthcoming in terms of who they typically compare themselves to. I began initial interviews asking this question outright: When you think about yourself in comparison to others, who do you compare yourself to? This was a mistake. Answers to this question generally indicated that each person was their own individual, a unique snowflake if you will, and that they did not compare themselves with others. I realized that there had to be underlying ways to talk about this. Through countless revisions of the interview schedule, questions such as: “What kind of life would you like to live? What kind of things would you like to have? What kind of opportunities would you like to have? Who specifically do you see or know that has the type of life, things, or opportunities you would like to have?” replaced questions about direct comparisons. For additional changes to the interview, please see the original interview schedule and the final interview schedule in the appendix.

Research Methodology: Data Analysis

Fifty-nine interviews were transcribed in Spanish by Marlyn Vallecillo, a hired transcriptionist working in Nicaragua that was highly recommended by colleague Karie Boone. I used these Spanish transcripts to analyze data, translating passages into English when necessary. All codes during data analysis were applied in English. I familiarized myself with the collected data by reading through and beginning the initial coding steps of the interview transcriptions. As mentioned above, 59 interviews were transcribed by Marlyn Vallecillo. In addition, I transcribed three interviews alone and two interviews were transcribed in part by Marlyn and in part by me. I entered into the phase of data analysis by transcribing the interviews that were done in English and doing an initial read through of the transcriptions that were in Spanish. During this time, I

began also noting thoughts about the data. These initial memos mark significant milestones of analysis across the research process (Charmaz 2006). My memos began as notes about codes and data, but even at a primary stage of analysis they began to develop into theoretical categories (Charmaz 2006). By utilizing these memos, I effectively improved my ability to fully analyze my data during the formal stage of analysis (Charmaz 2006).

I utilized a ‘theoretical’ thematic analysis to examine the data that was collected in the interview process. This type of thematic analysis provides a “less rich description of the data overall, and a more detailed analysis of some aspect of the data” (Braun and Clarke 2006 p. 85). This allowed me to stay narrowly focused on the impact that the introduction of a “global-local” reference group has on individuals’ experiences and conceptions of relative deprivation and socio-positional reflexivity. Utilizing this approach, I began a latent analysis of the data, what Braun and Clarke (2006) describe as “the underlying ideas, assumptions, and conceptualizations—and ideologies—that are theorized as shaping or informing the semantic content of the data” (p. 84).

In qualitative research, coding is defined as a way in which a researcher categorizes, labels, and names pieces of data in order to summarize and explain it (Charmaz 2006). Coding is an impoearative part of the research process. Charmaz (2006) describes it as “the pivotal link between collecting data and developing an emergent theory to explain these data” (p. 46). The coding techniques that I used demonstrate the way I arranged the data and began to dissect the data analytically (Charmaz 2006). As I began coding the interviews I adopted a template strategy for data analysis. This strategy consists of beginning with a template and filling in contextual details with context-laden data (Marshall and Rossman 2011). In this case, the template remained flexible. Since codes emerged from the data that did not fit with the initial contextual details of

my template, the template sometimes shifted. Hence, at times I was also engaging in editing analysis strategies to determine appropriate data codes and theoretical conclusions (Marshall and Rossman 2011).

Coding took place in two phases identified by Charmaz (2006) as initial and focused coding. In the initial coding phase, I studied the data in fragments, examining “words, lines, segments, and incidents” (p. 42) analytically. According to Rubin and Rubin (2012), in initial coding the idea is to “recognize and identify concepts, themes, events and examples” (p. 192) within the text. Therefore, events and topical markers are also a good place to start, particularly as these are rather easy to identify (2012). Since my interviews began with a discussion of an interviewee’s geographic mobility, moving (as an event) was one of my first codes and is coded as ‘migration.’ During initial coding I strived to maintain openness to the direction the data would take me, while also asking questions to keep my core interests in mind (Charmaz 2006).

By examining my interview schedule and initial memos during transcription, I was able to form an idea about what concepts and themes to code and pursue (Rubin and Rubin 2012). This approach informed the way in which I undertook focused coding, or the process of selecting “what seems to be the most useful initial codes and test[ing] them against...extensive data,” (Charmaz 2006 p. 42). The goal of the second stage of coding, or the focused coding, was to determine which initial codes made “the most analytic sense” in order to categorize the data thoughtfully and fully (Charmaz 2006 p. 57). During and after completion of coding, I utilized a thematic map to identify important themes derived from the data set.

I utilized Atlas.TI, a qualitative data analysis (QDA) software, to simplify the coding process. With the understanding that “actual judgments about the meaning, relevance, and importance of any given data must always be determined by the researcher and not by the

software alone,” I was able to capitalize on the benefits that QDA software offers without threatening the meaning and consistency of my data analysis and results (Drisko 2004 p. 210). In the case of this research, the main benefits of utilizing the Atlas.ti software were: (1) my ability to manage, organize, and store data without the necessity of inordinate amounts of physical space, (2) access to enhanced editing and revision capabilities through computer word-processing programs, and (3) the opportunity to re-trace my steps by saving and storing data at each stage of analysis (Drisko 2004). Given the ways in which Atlas.ti has the capacity to complement my abilities to analyze data, I chose to use the program to code my 64 interviews specifically around the research questions posed in my proposal.

Finally, I analyzed the data from a constructionist perspective, which emphasizes the notion that “perspective, meaning and experience are socially produced and reproduced” (Burr 1995 as cited by Braun and Clarke 2006 p. 85). In this way I examined both the ‘sociocultural contexts’ and ‘structural conditions’ (Braun and Clarke 2006) that shape accounts of individual experiences and perceptions. Essentially, analyzing under the assumptions of this perspective furthered my ability to determine what factors contribute to the way in which interactions with a global-local reference group shape perceptions.

As coding moves beyond just being a descriptive tool (Charmaz 2006), data analysis comes full circle and the research focus returns to developing theory. Interpretive ePistémology tends to define theory as “the imaginative understanding of the studied phenomenon...which assumes emergent, multiple realities; indeterminacy; facts and values as linked; truth as provisional; and social life as processual” (Charmaz 2006 p. 126). The constructivist approach to theory “places priority on the phenomena of study and sees both data and analysis as created from shared experiences and relationships with participants” (Charmaz 2006 p. 130). Charmaz

(2006) advocates that contextual grounded theory gives us the methodology to begin by addressing abstract concepts (i.e power) and ends with an inductive analysis that connects theory to both local worlds and larger structures. Following this methodological approach I revisited and refined my theories, and will explore these findings in the *Results* and *Discussion* chapters of this thesis. First, I will review the way I as a researcher was integrated as a part of the construction of knowledge in this research project.

Situating the Self: An intersectional discussion of conducting fieldwork

Reflexivity advances a researcher's ability to adhere to ethical behaviors both in procedure and practices (Guillemin and Gillam 2004). It is also necessary to be reflexive to keep ethics as a central focus of the research process that guides decision making (Guillemin and Gillam 2004). In addition, reflexivity is an essential component of the constructionist approach to research, meaning it is imperative that I take the time to acknowledge and discuss my own subjectivities that led me to conducting this study. As I too exist as a research instrument in this study, I must include information about myself, my experiences, and my training that accompanied me into the field (Kapborg and Bertero 2001). This includes the meaning that I as a researcher create (Rubin and Rubin 2012). This, in turn, influences the way in which individuals (myself included) understand and interpret the world around us (Rubin and Rubin 2012). With this in mind, I monitored, recorded, and discussed the influence that my own background had on the development of this study throughout the entire course of the research process (Rubin and Rubin 2012). I have attempted to insert reflexivity throughout this thesis, and believe it is essential to address it at a more in-depth level here.

In many interviews, my age, sex, race, and nationality impacted the behaviors of interviewees in very different ways. In one instance, a potential male participant agreed to an

interview after striking up a conversation with me. After it was revealed I was working with a male translator, the interview quickly fell through. In many instances when interviewing men along with my male translator, I was largely ignored. At the very least, there was a failure for either the translator or the interviewee to look me in the eye. This gendered dynamic was completely changed when I began recruitment and interviewing by myself. Thus the gendered body and social self affects entree physically, situationally, and meaningfully, and interactions are shaped differently for women (in particular depending on marital and motherhood status) (Warren 2001).

In this case, my status as a young, White, American female impacted the way I was received by potential participants. After one interview with a man, he repeatedly asked me to stay in town for the evening, telling me that he could get me a hotel room at the hotel he worked at for free that night. In addition, when interviewing several men at a restaurant, the initial individual that I had approached and discussed the research with doted on me throughout my hours in the restaurant. He continually referred to me as “mi Corazon” throughout the course of the day. In fact, the reason that my sample from this research site consisted of three women and eight men may be in part attributed to the role I was given as a female researcher in this context, Warren’s (2001) notion of a hypervisible, sexual female. Alone, it would appear that my ability to access male informants for this study was improved.

In addition to the way in which I was received by participants, my status also impacted the way Jamie Emilio and I interacted with each other. While I was indeed fortunate to connect with Jamie Emilio and appreciate the access to research sites that became available because of this relationship, there were times when working together on this study became very difficult. I believe this was in large part due to the perceptions of balance (or imbalance) of power and

authority in our relationship and particularly during the interviews (Berman and Tyyska 2011). As a white female, working with a male Mestizo, interviewing male and female Mayans, it is impossible to overlook the intersection of gender and race and ethnicity that took place throughout the interview process.

As a female, respect felt hard to come by. Jamie Emilio rarely looked me in the eye or actively listened to me. When I attempted to have a serious discussion about revisions to the interview guide, encourage a more open interview style, or generally discuss how the interviews my concerns were brushed off. Many of the male interviewees acted similarly when I was working with Jamie Emilio, and often times the conversations were carried as though I was not even present. This was particularly trying at times when I would interject to try and pursue follow-up questions to an interviewee's answers. In these instances, I felt more like the "invisible secretary or nurse"²⁰ figure described by Warren (2001) as my opinions, interjections, and directives were frequently ignored. However, other times interviewees would engage with me more than Jamie Emilio, as I was the only one making eye contact, nodding, and encouraging them to expand on their responses.

In addition to the influence that my own bias could have had on the interview process, Jamie Emilio carried his as well. This was difficult as his bias at times stood in contrast with my own subjective position. When interviewees would discuss frustrations with government corruption and an unwillingness to help, I inwardly sympathized with them. However, Jamie Emilio would tell me on the ride from the field site back to Mérida how the government can't do everything for everyone and that those individuals need to be responsible for themselves. In some of the very last interviews, Jamie Emilio added his own bias-nested question to my set of

²⁰ This term is a typecast that women have experienced as sociologists in male-dominated settings, wherein women are treated as either invisible or hypervisible (Warren 2001).

questions. His question was: “People who live in poverty, is it because they can’t work, or they don’t want to work?” As this was one of the last questions of the interview, it only began occurring on the last two days of interviews, and my calls for revisions sometimes went unanswered, I simply let it be. While this personal bias had the potential to threaten the validity of my research (Kapborg and Bertero 2001), I coded these instances as “leading the interviewee” and did not draw on these sections of the interviews when drawing out analyses or forming conclusions about the data, to ensure findings remained unimpacted. By excluding the responses that followed a leading question, my findings remain both credible and valid.

Self-reflexivity and a constructionist lens: Re-evaluating the researcher-translator relationship

It would not be sufficient to only highlight the shortcomings of the relationship Jamie Emilio and I maintained throughout the research process. In fact from a constructivist viewpoint, the different perceptions of researchers and translators should be “investigated and debated, not hidden” (Berman and Tyyska 2011 p. 615). During the course of the interviews that Jamie Emilio and I conducted together, he took the dominant role, meaning he primarily conducted the interview (Kapborg and Bertero 2001). I at times interjected, but mostly just acted as an attentive listener, trying to make eye contact with the interviewees and taking notes. After completing an interview, I would shift into a more dominant position as we would negotiate which questions worked, which ones didn’t, and how we could rephrase questions or restructure the interview. Yet, whenever part of the power I obtained in the research process was transferred to Jamie Emilio, I only begrudgingly conceded.

This perhaps suggests my inability to let go of the hierarchical power structure emphasized in research that subscribes to the positivistic paradigm (Berman and Tyyska 2011).

After reflecting on this, I believe that I was wrong to expect to or want to retain all of the power within this partnership. My inability to let this go throughout the course of the fieldwork was quite problematic given not only the theoretical and methodological assumptions I carried throughout the course of this study, but the fact that Jamie Emilio actually assisted the development of this research both before and after conducting interviews. His influence, suggestions, and negotiations of meaning enhanced this research as much, if not more, than his biases were detrimental to it. The way in which we had conflicting biases could actually be considered a strength as this meant that to some extent we were able to better balance researcher bias.

My initial positivistic assumptions are expressed above, wherein I discuss Jamie Emilio's role as a translator as "merely a mechanical and potentially problematic part of the research process" (Berman and Tyyska 2011 p. 180). This view emphasizes the need of the researcher to control the translator and reduce the occurrence of errors (Berman and Tyyska 2011). However, Temple (2002) challenges these assumptions by defining a social constructionists approach to using a translator: they are considered active producers of knowledge, who also carry a subjective history that is both based on their own life experiences and is gendered and racialized. From this point of view, the translator should be consulted at every step of the research process, through which a researcher enhances "the rigor and trustworthiness of qualitative cross-language research" (Berman and Tyyska 2011 p. 181).

While it was impossible to consult with Jamie Emilio through every step of the research process, the irony of my adherence to positivistic attitudes was that in practice Jamie Emilio was actually deeply involved in many of the decisions made in the research process. We constantly engaged in mutual consultation regarding the development of the study (Berman and Tyyska

2011). His insider knowledge guided the site and sample selections, he provided our transportation to the research sites, and he assisted with editing interview guides, adding productive questions like “Does your community have discrimination?” Jamie Emilio’s imperative role in this research process extended far beyond that of a translator; he too acted as a subjective producer of knowledge. From a social constructivist’s perspective, I can see that Jamie Emilio’s actions overall did much more to strengthen this research (Kapborg and Bertero 2001). Without his cultural expertise, the validity, reliability, and rigor of this study would have suffered dearly (Berman and Tyyska 2011).

Methodological Challenges and Limitations

Like any research project, and despite the best efforts of Jamie Emilio and myself, this thesis was not without its methodological challenges and limitations. Below I will describe most pressing methodological issues I encountered over the course of this thesis, including: gaining interviewee trust, using a translator, and overcoming sample limitations. After addressing these challenges, I will conclude by reviewing my overall methodological approach to conducting this study.

The challenge of gaining interviewee trust without an extended stay in the field

While Wax (1952) disputes the idea that a researcher needs a lengthy amount of time in the field to develop trust relationships with interviewees, there were times that some participants seemed uncomfortable sharing information with me (Marshall and Rossman 2011). It was clear when interviewees were not comfortable giving answers particularly when I asked about inequalities within their own community. Respondents who were uncomfortable with the discussion would simply respond that there was no inequality whatsoever within their own community, and refused to elaborate on this response. This was the only time at which the fear of

receiving dishonest accounts arose (Rubin and Rubin 2012). However, given the obviousness of the occurrence, this threat was detectable and should not have any lasting negative impacts on the credibility of the research.

Jamie Emilio's and my inability to convince some interviewees to open up with us was evidenced by several interviews that lasted 15 minutes or less. While the average interview time was longer than this, a 24-minute average falls short of the depth and breadth that should be developed during qualitative interviews. The inability to evoke long narratives was a result of a combination of issues, the primary one being the limitations of my fluency—which contributed to flaws of misinterpreting interviewee responses (Marshall and Rossman 2011). Jamie Emilio's approach to these interviews initially contributed to this problem, as he preemptively anticipated that individuals would not talk longer than fifteen minutes to begin with. This meant that during the beginning of the field work, Jamie Emilio moved through the interview guide extremely quickly. In addition, sometimes levels of interviewee mistrust and discomfort further compromised long narratives during the interview process.

Despite this shortcoming, as my time in the field progressed Jamie Emilio and I both became better at framing the questions differently and probing the interviewees to give more detailed explanations of their answers. I constantly reminded Jamie Emilio of the importance of encouraging respondents to expand on their answers, and I myself would typically interject during interviews with a simple 'Why?' or 'How?' This probing, coupled with constant revisions of the interview guide, helped Jamie Emilio and I combat short answers on the part of interviewees (Marshall and Rossman 2011). I was also able to break through this sort of trust barrier with many participants by demonstrating excellent listening skills (Marshall and Rossman 2011).

The challenges and limitations of using a translator

Another challenge in terms of the interviews was my ability to achieve validity and reliability while using a translator to assist in conducting cross-cultural interviews. This was problematic in this study for two reasons, first, because of the potential loss of meaning that can occur during translation (Twinn 1996; Kapborg and Bertero 2001), and second because of the tensions that arose between Jamie Emilio and I along the lines of gender, race and ethnicity, and personal subjectivities and biases. I will address these issues below.

Twinn (1996) undertook a study specifically aimed at understanding the impact that translation has on the validity and reliability of qualitative research. Contrary to what some may believe, she actually found that there were not any significant differences in the major categories that emerged from data recorded in Chinese and English (Twinn 1996). In addition, there were only minor differences recorded in the themes that emerged from this bi-lingual data (Twinn 1996). These findings indicate there are various issues that arise when utilizing a translator for qualitative research (particularly in terms of phenomenology), but that if addressed appropriately can potentially be overcome.

For this research, I used a translator to conduct interviews in Spanish that were based off of an interview guide I had designed in English. However, to avoid cross-lingual errors of conceptual understanding, translator Jamie Emilio and I met on at least two different occasions to discuss the goal of the project and review the interview guide question by question before we began to conduct interviews. While ideally a translator would also be fully knowledgeable about the research process and the subject of study, often time and money constraints on a project do not allow for researchers to find a previously-trained translator or devote time to providing a translator with extensive training (Kapborg and Bertoro 2001; Berman and Tyyska 2011). In

some circumstances, researchers may not even meet the interpreter before they begin conducting interviews together (Kapborg and Bertoro 2001).

Planning an early arrival date to the research site can help avoid this sort of problem, which is why I landed in Mexico five days before the translator and I were set to begin interviews. With this flexibility, we were able to meet in advance and discuss the project. During our meetings I had hoped to talk through each question on the interview guide with Jamie Emilio as he translated it; however, he preferred to take it home and translate it himself after we had discussed the background and aim of the research project. I was able to point out a few questions where I was uncertain about the proper way to translate them, and more importantly I tried to continually emphasize the way in which semi-structured interviews should unfold. I explained several times that I was looking for in-depth answers and that we would want to probe the interviewees at times when they said something that seemed very relevant. The ability to meet beforehand and go over my research interests and the interview guide was an invaluable way to decrease the chances of losing meaning during cross-cultural interviews.

Another way in which I believe this research avoided the pitfalls of loss of meaning through translation is that I went to great lengths to minimize the number of times language conversion occurred. It is important to recognize that the only reason this is possible is because I have an intermediate level of using and understanding the Spanish language. This meant it was not necessary for the translator to repeat what the interviewees were saying in Spanish back to me in English. In addition, all of the interviews conducted in Spanish were transcribed in Spanish. I then worked through these transcripts by translating sections of interviews back to English when necessary. Additionally, all coding was done in English, though I myself conducted eight interviews in Spanish while on the ground. My own Spanish language skills

allowed me to minimize the number of translations the data underwent, and thus, the potential for loss of meaning (Twinn 1996) was largely mitigated.

Finally, Twinn (1996) stresses the importance of using only one translator “for all interviews carried out in a study so that consistency in translation is obtained and reliability in the analysis of data can be maximized,” (p. 26). Since I used the same translator at five of the six research sites²¹ wherein on-site re-translation was not a factor, I was able to obtain reliability²² in translation. In addition, reliability²³ in data analysis could be achieved as I acted as the meaning interpreter for every interview.

This is not to say that there were never times that the idea of “creating meaning” was challenged during this study. This is because “different languages create and express different realities” (Spradley 1979; Kapborg and Bertero 2001 p. 52). As Twinn (1996) notes, this can make it difficult to identify appropriate words in English that represent what was said in a different language. During translation, we sometimes found that “there is no true equivalent within the source language,” (Twinn 1996 p. 421). For example, after completing a day of interviews Jamie Emilio and I began to talk about the Spanish concept “*forma de decir*.” The conversation lasted for several minutes as we grappled with trying to forge shared meaning. While Google translate considers “*forma de decir*” to mean “that way” in English and my best interpretation of the concept is “a way or form of being,” I believe that the English language fails at achieving a full meaning of this phrase. However, by discussing these phrases with the

²¹ Mérida represents a special case wherein a different translator was used.

²² Here, “reliability” suggests consistency of translation and interpretation by reliance on one individual’s subjectivities, as opposed to multiple subjectivities which would all need to be accounted for and would influence the creation of meaning within interviews differently.

²³ I use “reliability” in the sense that all meaning creation developed in data analysis and interpretation, while subjective, is consistent because all interviews were interpreted through the same subjective interpretation, that is, all meaning which was created in the course of interviews and selected as signifying importance were *consistently* influenced and interpreted my own experiences and understanding.

translator, we were able to go through a process of negotiating a shared understanding of what this meant.

Given the minimization of language translation, the preparation time with Jamie Emilio, the reliance on one translator for approximately 94% of the interviews, and the ability for Jamie Emilio and I to negotiate meaning across languages, I believe that this research, which draws on phenomenology, is able to largely circumvent Twinn's (1996) concerns about validity, reliability, and rigor when using translation to study a phenomena from an interviewee's perspectives. While it is impossible to ensure a perfect conveyance of meaning across the research process, it should be clear that Jamie Emilio and I worked tirelessly to avoid meaning loss at all costs. I believe we were quite successful, yet there were still some underlying problems between Jamie Emilio and I that had the potential to threaten the quality of data that was collected. These are addressed below.

Conclusion

Despite the challenges discussed above, I undertook a thorough methodological approach to conducting the research. Due to the rigorous approach both Jamie Emilio and I utilized when conducting these interviews, I was able to overcome the majority of potential threats to the validity and reliability to this qualitative study. The way in which Jamie Emilio and I were able to constantly negotiate throughout the process of this research endeavor strengthened the credibility of this study and allowed me to produce an in-depth analysis that uncovered nuances that I alone may have missed (Berman and Tyyska 2011). Therefore, despite the challenges of cross-cultural research and the use of a translator, I believe in this case, as well as in other research endeavors, the benefits of conducting cross-cultural research with a translator far outweighed the risks. When done correctly, the use and incorporation of a 'visible interpreter'

(Berman and Tyyska 2011) strengthens the quality of data a researcher can collect in qualitative research.

In this chapter, I have provided a comprehensive overview of the methodologies I used to complete this research. I began by restating my research questions, and outlining the constructionist approach that has guided my methodological approach to this research. In addition, I explained the reason that in-depth interviews were the best tool to uncover answers to my research questions and why the research sites selected were among some of the best locations to address these research questions. I deconstructed the population from which my research sample was drawn, and explained the sample techniques used to identify study participants. Following this section, I thoroughly reviewed the methods I used to both collect and analyze data. Finally, I spent time situating myself within the context of this research project and addressing the methodological challenges and limitations I faced during the course of the research process. Now, I will examine the results of the data analysis process I outlined above.

Chapter 6: Results

Introduction

In the previous chapter, I reviewed my methodology and approach to data analysis within this study, which included conducting, coding, and analyzing sixty-four in-depth interviews across the Yucatán Peninsula. Throughout the coding and upon completion of my data analysis, I began identifying key themes that emerged from the participant discussions of perceptions and experiences of inequality. Here, I will review these key themes, while keeping in mind the way in which each theme ties back to the relevant research questions posed at the beginning of this thesis, and to the larger literature on relative deprivation and social problems as a whole.

The central questions of this study focused on understanding perceptions and experiences of inequality, and thus many interviews focused on exploring this. The purpose of this research endeavor was to examine participant reflections to shed light on the following questions:

1. Is global mobility impacting individual perceptions and experiences of relative deprivation and inequality?
2. Has the constant flow of international tourists through this area created a type of “global-local” reference group that extends beyond friends and family members? If so, how has a reliance on this type of reference group impacted people’s lives and their perceptions of themselves?

These questions are important to address for several reasons. As developing countries are becoming more exposed to globalization and a globalized population, inequality still persists. If we expect to see inequality and relative deprivation continue to be linked to social problems as previous literature suggests, it is imperative we breakdown how inequality and relative deprivation play out in peoples’ lives on a day-to-day basis. Finally, given that what constitutes

our “day-to-day” lives has become increasingly globalized for many people through the late-20th and early-21st century, to truly understand inequality we must examine the way in which our increased interactions with broader groups of individuals might impact our experiences of deprivation relative and with whom we compare ourselves to. The future of addressing social problems thus may depend heavily on our ability to close deprivation gaps, first by better understanding how relative deprivation might be defined—a complex task in times of rising inequalities.

The results of this study shed light on perceptions and experiences of inequality as well as equality—both in an economic and non-economic sense. In addition, through these discussions of equality and inequality, it emerged that types of relevant reference groups vary beyond what the current literature suggests. Most importantly in the context of this thesis, foreign tourists are indeed utilized as a reference group, particularly by participants who reside and/or work in areas where they maintain high levels of interactions with tourists. It also emerged that family, peers, and political figures served as salient reference groups, however in line with the research questions of this thesis, I will focus primarily on tourists as a salient reference group.

Below, in keeping with the questions driving this study, I explore the way in which tourists were expressed as a salient reference group for many respondents, particularly those who had more frequent levels of interactions with tourists in their everyday life. However, it is important to first engage with the broader concept of inequality, within which relative deprivation and reference group theory are nested, in order to fully understand discussions of tourists as reference groups. The following section provides an analysis of participant feelings and expressions of inequality and equality. Here, I make a pointed distinction between the

manifestation of experiences of economic and non-economic inequality and equality based on the interviews. I follow this analysis with an exploration of reference group formation, focusing primarily on the way in which tourists and foreigners were used by respondents as a point of reference in discussions of both inequality and equality. Finally, I close by tying these results back to the larger literature on reference group formation, inequality, relative deprivation, and poverty.

Perceptions and Experiences of Inequality

Roughly two-thirds of participants in this study expressed a belief that inequality, ranging from “mild” to “extreme” existed in their community. Overwhelmingly, participants in rural areas expressed perceived inequalities while participants in Playa del Carmen and Mérida focused more on experiences of equality.²⁴ In addition, participants who perceived themselves as part of the lower class, those who expressed little socioeconomic mobility, and those with lower levels of education tended to focus more on discussions of inequality (as opposed to equality) within their respective communities. One of the ways many respondents engaged the topic of inequality was in an economic sense.

Economic-Based Inequality

Economically-framed responses to questions about equality and inequality were often emphasized by participants as a point of disparity between themselves and others. In fact, when asked about general equality and inequality within their own community, respondent’s most frequently responded by acknowledging that economic inequality did exist and for some, it contributed to community divisions:

²⁴ This result is interesting as the majority of rural-urban literature has focused on the rural-urban inequality divide. Recently, burgeoning literature suggests that inequality in developing nations, particularly in regards to health, is worse in urban areas than in rural areas (see Friel et al. 2011).

“Very few people live well, if you can find it, it is mostly in the town center. Almost all the people with money are in the center where the shops and businesses are. The town is divided into several parts. At the end of this street is where you will see those who are rather poor. The middle class/average is how we live, we live a middle-class life.” [Valentina]

“All of the artisans, they care for their money and have good houses, they have cars, they have work, and manage their dollars but with others also there is a part that don’t have this, for example, all the people who work in the field, they don’t have dollars, cars, trucks because they don’t make enough to afford it.” [Emilio]

Other interviewees talked about economic inequality that extended beyond their own community, which still hints at the existence of divisions, but on a larger geographical scale:

“Primarily in the economic system most are concentrated in some cities, like Valladolid, primarily Mérida because there they have the government, we think the capital is where there is more people who are taken care of, others are not treated the same, Mérida is the main economic system in Yucatán, after that there is Valladolid, Tizimin, Ticul, Tecash, and Oxkutzcab.” [Emiliano]

“We have people who come here from Europe more than anything from France who have a job like we do, they come here as waiters and you could say they are a little better off because of the way their work is there [in France].” [Mario]

“It’s better in the U.S. because here in Mexico we earn very little. The salaries in Mexico don’t compare to the U.S. salaries.” [Tomas]

“Minimum wage in Mexico is lower than in the north [U.S.]... “Mexico has a lot of manual labor jobs that are not well paid, our government has sold us as manual labor with too much emphasis on economics...and businesses from abroad buy this labor.” [Agustin]

Agustin was not the only individual to address economic inequality through a discussion of Mexican wages. Here, for example, Paulina broaches a wage issue that speaks to an issue related to the globally mobile population:

“The only ones who have it good are like the foreign people that come to live here they are the ones who have the money to come and buy you know or to open businesses or make a profit from using [pause] the poor people because they are--the ignorance that we have um, you know that's why our salaries are

so low since they come to make business here and they should be paying the same that they are making because they are charging them in dollars so we should be paying in dollars but no we get really, really low salaries.”
[Paulina]

Her observations also touch on another piece of economic inequality—investment capacity, wages, and unequal opportunity for economic mobility—a concern that is built upon by Perez and Juan:

“The region does nothing but farming, I grew up on a farm, my dad worked land planting oranges, all kinds of fruit, the land is really fertile you can plant anything here, we have really rich soil here, but no money to explore all the lands. You need to have money to invest so instead of making one plot, you can make 10, 20 plots, but they cost a lot of money, most of the people that work here, like my dad, we don’t have that kind of money, so we just work a little bit of land, enough to survive.” [Perez]

“Here we have to go to the extremes. There are a few in the middle, but more on top, and more in the bottom...its growing fast there are a lot of people investing, and when people have the economic power to invest, it works good here, a new idea, a good company, and then they keep going up and up and up... But, a lot of people, they don’t have the money, they just have to work, the places, they just pay enough to survive, so they cannot do better, they cannot afford it.” [Juan]

Juan’s statement suggests a wealth gap between individuals within the top and bottom class in his community (in his case, Playa del Carmen). Hugo, suggests he sees a continued expansion of this divide:

“The rich get richer and the poor stay the same.” [Hugo]

The majority of participants spoke to the existence of economic inequality within their community, with one man, Renata, describing economic poverty’s impact as the “worst thing we could have, starting in childhood.” Yet many other participants who suggested that economic inequality did exist in their community did not divulge much more of a description of its existence than in broad strokes (e.g. ‘the rich get richer’). However, at times when the inequality was conceptualized more complexly, participants seemed to open up the conversation to a deeper

discussion of inequality in their own community and elsewhere that moved beyond strictly economic conditions.

Beyond A Strictly Economic Understanding of Inequality

During the interviews, conversations about economic inequality often led to discussions of other forms of inequality, particularly feelings of being treated unequally by others. Many individuals broached the topic of experiencing or seeing discrimination based on social status and group membership, such as race and ethnicity, nationality, and political standing. These perceptions of inequality were being expressed when respondents were asked to talk about poverty and inequality as a generality within their community. While questions regarding class differences and indicators of poverty were initially included in the interview guide, questions about race/ethnicity, culture, and politics initially were not.²⁵ After hearing several expressions of inequality tied to unequal treatment and perceived discrimination, I began following up these comments by participants with questions about discrimination in the communities. Of primary concern for many respondents was the way in which socioeconomic standing created divisions between their community members. In these instances, it was not just a monetary difference that created these divisions, but the perceived social positions accompanying these differences. One general example of this was the position one might hold within a hierarchical class system:

“I mean I don’t want my kids to be in the same situation that I was growing up, the same position with no opportunities because if you don’t belong to this high class society you will stay down at the bottom no matter what.” [Perez]

While Santino and Alejandro demonstrate the way that type of employment might dictate how a person is treated:

²⁵ Remember that because race and ethnicity is such a highly-charged topic throughout these research sites, self-identifying race questions were not included as part of the interview guide. Yet, race and ethnicity was often brought into the interview by the respondent themselves, suggesting that race and ethnicity may still be perceived as an important issue for many of the respondents.

“If a person has a certain job, they think that they are better than another, but it depends, not everyone is like that.” [Santino]

“In our community we have had a lot of help but often it is people with secured salaries and jobs that go to the government for help while those that have less, the help does not arrive to them.” [Alejandro]

These expressions describe inequality as encompassing both economic and social disparity among Mexican community members. Other types of socioeconomic inequalities, such as political problems that contribute to unequal access to resources and care across communities, were also mentioned:

“There is inequality, more than anything in the political sense, this is the ugliest seed that exists in a community, when we should all be united because we are all family. Unfortunately, policies are misguided to the point that there is certain discrimination among the people. There are ordinary people, there are people who remain in politics, in the position they are the dominant group, and unfortunately there are neglected communities, there are communities that don’t have the resources to survive, and this has been, for me the politics right now have created discrimination.” [Carlos]

“We need a good President, I am so involved in my work so that my children can improve their lives that I can’t go to community meetings. But I realize that we never moved forward but stay at the same level, they [political leaders] never pay attention... when the President promises social security and doctors they never deliver... because of this I distanced myself.” [Selena]

Not only did these political issues contribute to a perceived unequal distribution of resources, Paulina suggests that the government itself acts in a discriminatory manner:

“I think the only discrimination here is from the government. Because like, for example if you are a foreigner and you want to open a business or if you want to do something, because they know you have the money, everything is easy for you. But if you are a simple [Mexican] person, they make everything more difficult for you.” [Paulina]

While Paulina’s statement alludes to being treated differently than her foreign counterparts, what is more troubling is how problematic discrimination by their fellow countrymen and women was for respondents in this study:

“The discrimination, if it comes from foreigners it is nothing, but I see the most difficult thing is when it is discrimination amongst ourselves, like discrimination against your own family, to the people around you we are all family, I see the more difficult part as when discrimination exists between us, when it obviously should not happen.” [Carlos]

For many respondents the complex issue of discrimination among Mexicans went beyond the actions of government, occurring within the research site communities as a part of everyday life, and cutting across lines of class and race and ethnicity, zoning in on poor, indigenous Maya families:

“I see in my country, we discriminate against ourselves more than people in any other places, because if you don’t have this then you don’t belong to my class. I used to go to an elementary school, and when you go to class or school, you can tell right away who is who there. One bunch gets together because their dads are teachers, doctors, lawyers, they have nice shoes, nice clothes on them, and then this other group that got together, wearing native sandals, native clothes, talking Maya language, so it’s you belong here and we belong here because my dad is this and that, immediately you feel the discrimination right there. This is a problem more in Mexico than in the US, the biggest problem for me is that my own people discriminate against my own people, this is the real discrimination.” [Perez]

“I can tell someone lives in poverty because of the way they dress, they can’t write, they speak Maya, they are indigenous, this is because they are dirty, they don’t bathe.” [Ignacio]

“The people that have money look down upon those without...people with money practically despise the very low class people and so there is inequality... The people who have a lot of money, they usually aren’t Mayan, the Maya are the ones that are poor.” [Joaquin]

On top of these internal complexities surrounding experiences of inequality, respondents also discussed ways in which they had experienced discrimination or being treated unfairly by foreigners. While cross-border concerns came up less frequently and may be less impactful than perceptions of domestic discrimination and inequality, they do add another layer to understanding the way in which inequality can and has manifested for participants in this study. That layer in short is the existence of inequality and discrimination based on nationality:

“We know that access at the borders like I said, there are disadvantages and unfortunately we Mexicans are discriminated against by the people of the U.S.” [Carlos]

This, as Paulina and Perez note, can happen both at home and abroad:

“Some people don't understand that being in Mexico, it's still not the same, even for Mexicans our life is tough and frustrating and when they come and they don't get just what they want, they start yelling, ‘You fucking Mexicans’ and things, and you know cursing at us and ‘You Mexicans, these Mexicans,’ I mean I-I honestly, we sometimes endured that when we were there in the U.S. because we were in a country that wasn't ours. So it was ok. But when you are in your country and then you have to have another people come to your country to your home, and say it and, and yelling and being rude in that form, is, that is something that sometimes I don't like from tourists.” [Paulina]

“Here, we are Mayans, and this is also why so many migrate, because we are always discriminated against because we are Indians, and even when I got there [to the U.S.] and people ask where you're from, people will say Mérida, because they know if they say a small town then they will know that he is a native. That was one of the biggest problems, why people started migrating from here, the society here, all the Mexicans that don't have opportunity are considered Indians.” [Perez]

In these responses, we see the way in which social and ethnic group memberships are directly tied to participants' expressions of inequality and discrimination in this study. But just how much do these experiences and perceptions of inequality impact these respondents? One of the core contributions of relative deprivation theory discussed in the literature review of this study was that inequality matters, a notion that is well accepted in the sociological community.

Furthermore, Wilkinson's work on relative deprivation suggests that inequality is positively tied to the prevalence of social problems in a community, so that when the inequality gap expands, so too do rates of social problems. So after examining the emergent patterns of perceived inequality for participants in this study, the question is: How, and how much, does this inequality matter? While the impact inequality might have on an individual level is difficult to measure, some participant responses do shed light on how they see inequality in their community impacting

themselves and others. The way in which respondents felt impacted by this inequality varied greatly. Olivia, for example describes the way in which she has witnessed great material losses at the hands of inequality within her community: For some respondents, this could be quite devastating:

“[Inequality] is causing a lot of problems when people don’t have a stable life, because when it came to hurricane season, some of them lost their houses, they don’t have anywhere to live, they don’t have anything.” [Olivia]

This suggests that residents of these communities may suffer materialistically as a result of inequality, while Perez indicates the way in which experiencing inequality may also have an emotional impact on individuals within a community:

“Who wants to stay in school with those kids? All you want to do is beat them up...I can tell you from my experience, you don’t want to go to school, don’t want to be among kids that have everything I don’t, it’s just hurting my feelings all the time.” [Perez]

Not everyone, however shared this experience. Take Daniela for example. She identified that inequality does exist in her community, but chooses to dismiss it as a focal point in her own life:

“Yes, there is inequality, but if you also take into account what is the same, you can make your life better and do not pay attention to the inequality.” [Daniela]

Daniela was not the only participant who focused on what things might be the same for people in her community. In fact, while most individuals interviewed did discuss inequality within their community, others spoke up about the way they perceive and experience equality within their communities. Below we will explore these discussions of equality.

Experiences and perceptions of equality

Discussions of participant’s feelings about equality and inequality varied across interviews. The majority of individuals suggested that their communities experienced more

inequality than equality among residents. Conversely, several individuals, particularly those in Playa del Carmen, expressed a sense of equality within their community, suggesting that “we are the same people,” “we are all human,” or “all the people who come here can do the same thing.”

As Eduardo puts it:

*“Here there are Quintana Roó people working, there are people of Chiapas, Mexico's people, people of Puebla, here there are workers from all over the world, Italians, French, Americans, Swedish, Canadians, Argentines, Peruvians, Bolivians, worldwide, and so there is no discrimination, there is equality, there are opportunities.”*²⁶[Eduardo]

and as Sergio further illustrates, in Playa del Carmen:

“You can be anywhere, you can enter any restaurant, and we are all equal, here no one says ‘You cannot spend your money here’...all are equal there is no racism...I can go wherever and all the people who come here can do the same, can go anywhere, and nothing happens to them.” [Sergio]

The notion that respondents living in the highest volume tourist area of all research sites overwhelmingly expressed experiencing more equality than inequality within their community contradicted my initial research assumption that increased exposure to an exceedingly more well-off population would increase perceptions and experiences of inequality within the community. It also called into question the extent to which respondents were speaking highly of their community in order to retain their city’s positive image in the tourist industry, but I will return to this concern in more detail as a study limitation. The key piece that I did not foresee when I made the above assumption was that most respondents whom believed there was an abundance of *equality* in their community, conceptualized equality in terms of how individuals are treated by establishments, not economically or materialistically. In fact, respondents rarely express a belief in economic equality within their communities, hence the reason Juan could suggest that in

²⁶ This example, along with similar responses indicates the influence of an important decision I made when constructing the interview design. Within the interviews, I chose not to specify the basis of equity discussions, allowing the concept open for respondent interpretation. While participants overwhelmingly tended to still interpret the question in an economic sense, this was not the case for all of the participants.

Playa del Carmen everyone was equal in terms of performing their day-to-day tasks, but financially, inequality still persisted:

“Socially, yes, everyone has to go and pay taxes and go to the banks and wait in lines and everything, but economically, it’s not equal there are some people that have a lot.” [Juan]

In fact, while more interviewees in Playa del Carmen expressed feelings of equality, some were quick to point out that economic discrepancies did still exist in the community:

“If you walk a little further from here, North, past the bridge, you will find a different style of life, people who don’t have stable life, [they live in] tents/shacks, [they] don’t have electricity, so no, we are not equal.” [Olivia]

This suggests that, depending on the way in which individuals within this study were defining equality and inequality, their responses might be quite different. While within their communities there was little to no suggestion of the existence of economic equality, when the scope was broadened to encompass a more global economic perspective, some respondents’ views on economic equality changed.

Exploring points of reference: Inequality and equality in comparison to whom?

When participants discuss notions of viewing or experiencing inequality, it is important not to lose sight of the base of the concept of inequality—that a comparison is being made between at least two individuals. In this study in particular, individuals were prompted to identify who they compared themselves to, and on what basis these comparisons were being made. From these conversations, family, peers, foreigners, and prominent individuals emerged as salient groups used as points of references. Within these discussions, reasons for making comparisons to particular persons or people within and across different reference groups varied. Because particular themes were prominent across several types of reference groups, it is important to note the role of underlying comparison bases in reference group formation.

Foreigners and Foreign Tourists

If the relative salience of a reference group is transient, it seems reasonable that transient groups of people might emerge as points of references in places where they hadn't previously retained a presence or importance. Prior to the opening of airports in Cozumel and Cancun in the 1980s, the Yucatán Peninsula saw little to no tourism. Today, the region brings in the largest volume of tourism in Mexico. (The History Channel 3/1/2013). While assumptions about reference group formation prior to this study cannot be made, in the context of this study it remains that, foreigners, overwhelmingly in the form of tourists, are perceived by many respondents as a salient reference group.

Earlier in the discussion of perceptions of social equity, there was some documentation of this, as respondents spoke about equal treatment received by all in Playa del Carmen, regardless of nationality. In some interviews, these feelings of social equity continued to be expressed:

“Those who work here are like those who come on vacation. We have a friendship, so I don't know who works or who comes on vacation, everyone goes to the same places, we drink in the same places, and so it is one big community more than anything.” [Diego Alejandro]

For others, the differences they reflect on between themselves and tourists are minute, and more dependent on other factors. Mario and Carlos demonstrate this:

“Tourists live a little different but very similar, because it depends on their profession.” [Mario]

“People who have money, yes there is a difference in life, but there are people living like tourists I consider those people the ones who have a little ability to generate job opportunities, I think they are people like anyone else...I think there are many people living that way, maybe their efforts are on the work, and to leave a little savings.” [Carlos]

In the same way that Mario envisioned tourists similar to himself based on having the same job, other respondents saw similarities between foreigners and themselves based on their ability or desire to travel. Pedro illustrates this point:

“I think when you are a tourist or when you travel I think you are in the same social position of others who have the ability to travel, whatever the nationality. If you are Mexican, if you are European, Asian, whatever, if you have the chance to travel, you are at the same level because people from Latin America, the United States are going to Europe, people from Europe come here then they have to save and have the ability to travel then I think they are the same, the tourists around the world I think are the same socioeconomic position, the upper middle class, because when I was in Mexico City, I was in the upper middle class, and I went to Europe, I went east to India, I was traveling a lot.” [Pedro]

This response suggests that Pedro believes there are certain similarities to individuals who have the capability to travel, regardless of their nation of origin. The notion that individuals with international geographic mobility form their own class of sorts suggests that perhaps en masse foreigners, tourists, and transient groups of individuals serve as a relevant reference group for many of the respondents in this study.

Not all participants view themselves in the same light as their foreign counterparts when making comparisons between themselves and tourists, however. Some respondents pointed stark differences, often suggesting non-Mexicans have it “easier.” There are several examples of these sentiments:

“The tourist, he lives well, has a car, has it easier, it can be in the U.S. or here, he has money and it is easy to buy or get a good house, to buy an apartment.” [Ignacio]

“For us here in Mexico it's very, very expensive. I mean I know having dollars or Euros is easier.” [Paulina]

“If I do this, spend all my money to go home, the way back would be hard, but they [tourists] have the ability to pay for those things, they have a credit card, I don't even have a credit card.” [Olivia]

“They [tourists] come to enjoy the beach and we have to work for them, we have to work and they enjoy the beach.” [Luis]

“Mexico has a lot of manual labor jobs that are not well paid, our government has sold them as manual labor with too much emphasis on economics...businesses from abroad buy this labor.” [Agustin]

Not only were the lives of foreigners and/or tourists deemed easier by participants comparing themselves with tourists, they were also widely considered to be “better”:

“It’s better in the U.S. because here in Mexico we earn very little. The salaries in Mexico don’t compare to the U.S. salaries. [Here] You go to the worksite and there is no work, but that doesn’t happen in the U.S.” [Tomas]

“Tourists live a better life than we do, because of their lifestyle, and because in Mexico we are working more for less money than in the U.S.” [Vicente]

“Those who come out to vacation, it is because they have the income. If they didn’t, they would not leave on vacation...their houses are better than ours, they have better jobs, I talked to various customers who have made friends here at the reception they say that there are people who have their restaurants have their business, and there are ones that have their hotels. I recently met one person from Austria who has hotels and has a home in Canada and sometimes when people talk, you know what kind of life they lead and business they have.” [Lautaro]

Many Mexicans who participated in this study maintained that life as a Mexican was harder than the lives of the foreigners and tourists they interacted with, or at least, they had to work harder and longer than the foreigners that they know and see. Yet these economic and employment differences were not the only ways in which respondents compared themselves to foreigners. In response to a question about desired opportunities, several respondents expressed a desire to travel when comparing themselves with foreign tourists who are capable of doing so. For example, Paulina gushed:

“I would love to, to I mean I really would love to know the whole world. I wish I had the money to do that. I would really love to do that. I mean I don’t want to die just being here since I know there are many beautiful places to know. I really envy, I really envy the people that I know they come and what you have being here you have a chance to talk to the guests and when they tell you a little bit of

their travelings like that when they come and they went to parties and they went there. I really envy them because they have that power of doing it.”

Though this strong desire for travel was expressed, often it was unclear, even to the participant themselves, whether the ability to travel could one day be a reality or not:

“I think they [tourists] live differently, because for them even a librarian may have the opportunity to travel without needing to save.” [Agustina, Librarian]

“The disadvantages [of my socioeconomic position] are the same, that maybe if I want to study a Little more perhaps elsewhere to change because there may not be sufficient resources to travel and live in another place.” [Ignacio]

While the desire to travel is not uncommon, it is important in the context of this research as it is discussed as a form of relative deprivation in comparison with the tourists they see and interact with. Furthermore, this expression of a desire to travel occurred almost exclusively by individuals in high-volume tourists communities. In addition, the responses are intriguing because, on the one hand, interviewees seem to acknowledge that the ability to travel may be out of their own reach. Yet, they still utilize this as a base for comparisons and talk about individuals who have that capacity to travel as part of their frame of reference for self-comparison. This potentially contradicts Singer’s (1981) finding that individuals tend to compare themselves with those that they perceive to be relatively similar to themselves. The implication is that those who we interact with on a daily basis may play an equal or even more important role in our reference group formation than perceived similarities.

Perhaps the most telling argument to support the importance of daily interactions in this research is the variance in frequency of the “foreigner” reference group across research sites. Respondents in Playa del Carmen and Pisté (who experience the highest exposure to tourism) cited foreigners as a reference group more frequently than individuals from any other site. In the remaining four communities, foreigners were referenced a total of three times. This demonstrates

that the use of foreigners as a reference group varied significantly based on the level of interactions a participant typically has with tourists.

Individual differences across interviews are also vital in demonstrating this point, as all but one of the individuals who used foreigners as a reference group were individuals who worked in the tourist industry. In fact, just over half of the individuals in this study that worked in the tourist industry are ones who included tourists as a reference group, while of the 25 interviewees who do not work in tourism, only one individual included this reference group. This further demonstrates that tourism may influence the formation of reference groups while simultaneously becoming a relevant category itself.

Conclusion

Drawing from these results, there are two overarching findings which I will draw on in the next chapter. First, the way in which an individual defines inequality impacts their perceptions of its existence and persistence within their own communities, as well as the basis for how their reference group(s) for self-comparison form. Second, Salient reference groups extend beyond the traditional types of reference groups, and, in this case, include foreign tourists.

In this chapter, I provided an analysis of participant feelings and expressions of inequality and equality, distinguishing between the manifestation of experiences economic and non-economic inequality and equality based on the interviews. I followed this analysis with an exploration of reference group formation, focusing on the way in which tourists emerged as a salient reference group, primarily for respondents in communities that host large numbers of tourists. Finally, I closed by tying these results back to the larger literature on reference group formation, inequality, relative deprivation, and poverty and introducing the study findings. In the

next chapter, I will explore these findings and the broader implications of this study for future directions of relative deprivation research.

Chapter 7: Discussion

Introduction and Review

In the previous chapter, I presented the results of this study. Below, I will expand on these results by reviewing this thesis as a whole, suggesting the key findings that have emerged and their relevance, and concluding with a discussion of the limitations of this study and directions for future research. I began this research primarily interested in the following research questions:

1. Is global mobility impacting individual perceptions and experiences of relative deprivation and inequality?
2. Has the constant flow of international tourists through this area created a type of “global-local” reference group that extends beyond friends and family members? If so, how has a reliance on this type of reference group impacted people’s lives and their perceptions of themselves?

These questions are relevant for understanding relative deprivation, and reference group formation in relation to increasing interactions with tourists, and more broadly to illustrate the relationship between inequality and social problems in an increasingly developed and globalized world. To address these research questions, I first provided a review of relative poverty, relative deprivation theory, and reference group formation literature in Chapter 2. There, I argue that in-depth, qualitative studies on relative deprivation, inequality, and reference group formation are lacking in the literature but are needed because they allow for participants to openly and subjectively define their relative positionality to person(s) of their own choosing—which is essential for truly understanding relative deprivation and reference group formation. After explaining the value of selecting the Mexican Yucatán Peninsula as the region from which I would select my research sites, I provided a brief review of the modern social policy history of

the Mexican state, and its attempts at addressing issues of both poverty and inequality. By drawing on Mexico's history of social policy, I was able to delineate inequalities in historical and present-day Mexico and tie them into the findings of this study.

After an in-depth discussion of my research site selection in Chapter 4, I began Chapter 5 by reviewing the qualitative methodological approach I took to conducting this research. I continued Chapter 5 by exploring the role of ethnicity in the context of my research sample and providing a concrete description of my methodological approach to collecting and analyzing qualitative interviews from Chunkanun, Mérida, Oxkutzcab, Pisté, Playa del Carmen, and Seyé. Finally, in the previous chapter I discussed the results of this study, highlighting the way in which participants expressed their understandings and experiences of inequality, as well as their use of foreign tourists as a key reference group in discussions of inequality and equality. Below, I address the key findings of this research and the relevance of these results.

Key Findings

The results suggest that when subjectively examined, inequality can mean very different things to different people. It can be interpreted, understood, and evaluated both economically, as well as non-materialistically—though the two are often intertwined. In addition, individuals often talk about themselves relative to others by utilizing different groups or individuals as points of reference. In the context of this study, this meant that participants in high-volume tourist communities frequently utilized foreign tourists as points of comparison. What this indicates is that foreign tourists were a salient reference group for many participants—primarily those whom interact with foreigners and foreign tourists on a more regular basis. Specifically, findings from this research suggest the following:

1. The way in which an individual defines inequality impacts their perceptions of its existence and persistence within their own communities, as well as the basis for how their reference group(s) for self-comparison form.
2. Salient reference groups extend beyond the traditional types of reference groups, and, in this case, include foreign tourists.

Drawing on these findings, I posit that in this study, participants' daily interactions, with whom they frequently interact, and at what level of depth these interactions take place influences the way in which they perceive themselves in comparison to others, and with whom they tend to compare themselves to. Undoubtedly the layers that lead to reference group formation are complex. Race, gender, education, and/or geographic proximity likely play a central role in reference group formation as argued by Singer (1981). Sociodemographic factors can reduce and even restrict our sphere of possible interactions in any given situation, but their effects are shaped by different interactionary landscapes.

Relevance

The fluidity of equality, inequality, and reference group formation

An important takeaway message of this thesis is the extent to which varied conceptualizations of inequality appeared to impact respondents' perceptions of relative deprivation and the formation of reference groups. The way in which equality and inequality were defined by participants (i.e. economically or socially-based) fluctuated, and in turn impacted their perceptions of themselves in comparison with others. Furthermore, living in an increasingly globalized world appeared to have been an important factor in shaping some of these conceptualizations.

Across most interviews, the participants were asked to express their thoughts about inequality at the local, national, and international level. Participant responses varied, but several individuals expressed a feeling of global equality at the time the interviews took place. In these cases, participants seemed to be couching their own (poor) economic circumstances in what they believed to be a global economic crisis. For participants who discussed this crisis, global hardships were referenced as an indicator of unfortunate, but generally equal circumstances. Ironically, Emiliano, who expressed concern for inequality within his own community, observed that:

“In the world, almost everything is the same, and we are seeing in Mexico, for example, that Spain has economic problems, Greece, England, the U.S., they have economic problems.” [Emiliano]

Tomas similarly emphasized changes in the global economy and how he is connected to the employment struggles felt similarly around the world:

“You have to realize that now the salary and the economy in the U.S. are pretty much equal [to Mexico] because there is not much work here or there. And if you find work [in the U.S.] it is great but if not you return to your own country here...The economy right now is a little difficult, but not just for us I think it is global. We see it because we work with tourists and the tourism this year was very bad for us. We do not think that every year, but there is a crisis now, now we are experiencing difficult days, but not just us, for them too, this is why there is equality.”²⁷ [Tomas]

In this case, the particular circumstances of the 2008 economic crisis changed the way in which these participants saw their own struggles in comparison with others': this was a struggle felt by all. These feelings of a shared burden would be impossible for participants to have if they were not connected to the global economy. In essence, globalization and our increasingly cross-national interactions have led to a change in our ability to connect with individuals who in

²⁷ This also demonstrates the extent to which several of these research sites are inextricably tied to the global economy, and are particularly dependent on tourism for their economic livelihood.

sociology have often in the past served as a distant, unimportant “other.” This study recognizes this change, and explores one aspect of it by focusing on interactions with tourists.

In this thesis, tourism serves to connect the global and local spheres, grounding the abstract concept of globalization in an easily identifiable, concrete practice. However, it isn't just tourism that impacts our perceptions of inequality, and they are likely not the only salient reference group that can represent changes in a globalized world. Essentially, I posit that the salience of tourists as a reference group represents one of a multitude of ways increased global interactions under the umbrella of globalization can influence reference group formation. The overarching point is that globalization as a whole has changed and will continue to change our interactions with others, our process of reference group formation, and our experiences and perceptions of relative deprivation. This means that we must continue to examine relative deprivation and reference group formation under the premise that an interactionary sphere is not permanent, but extremely fluid and increasingly global.

Above I reviewed literature in which a number of previous authors discussing relative poverty suggest there is no way to separate standards of living from the particular historical conditions of a place and time, and additionally, that standards of living are constantly changing. Thus, “poverty as a social condition must be defined in reference to the period in which an individual lives,” but “must be understood as locally defined according to the norms predominating in particular communities, allowing for comparative analysis of poverty that adjust for ‘differences in conditions between different societies at simultaneous moments in time’” (Rosenfeld 2010 p. 103). It is my suggestion that these same standards apply to our understanding of relative deprivation and reference group formation, in that, we must challenge ourselves to understand reference group formation within the context of the both local definitions

and the changing living standards and interactionary scapes brought about by the process of globalization.

As the world continues to become more globally connected, there will be increasing opportunities for shifting conceptualizations of equality and inequality, as well as increased opportunities for developing new and salient reference groups. This of course, can be attributed to increasing fluidity in terms of interactions, which has been discussed previously and will be re-addressed below. Ultimately, if reference group formation and perceptions of inequality develop as subjective, fluid conceptualizations dependent on both interactions and their context, then we must focus on problems related to social inequality in a subjective and contextual manner in order to make progress.

When and where does relativity matter in the context of globalization?

In a World Bank report, Ravillion (2008) suggests that relative deprivation is likely to become more important as a country continues to develop. Other previous research has also suggested the same might be true for urbanization, that, as a population becomes more urbanized, measuring relative deprivation becomes increasingly important. One value of this thesis is that the research site selection was able to provide additional support for the validity of these claims.

In Mexico, globalization has increased the trade relationship with the U.S. and has also contributed to the domestic migration of workers from rural areas to “industrialized urban centers,” like Mexico City (U.S. Dept. of State 11/20/2011). Currently, approximately 76% of the population lives in urban areas (U.S. Dept. of State 11/20/2011). When we think about the ways globalization has changed the conditions of Mexican society (increasing Mexico’s integration in the global economic system, urban migration patterns, standard of living, and rates

of inequality), the importance of the relationship between globalization, perceptions of relative deprivation and inequality becomes increasingly clear. In general, selecting Mexico as a research site contributes to the literature by addressing the gap of understanding perceptions of relative deprivation and the process of reference group formation outside of the context of developed nations. Furthermore, the state of perpetual and quickening transition that Mexico finds itself in as a result of globalization is not a phenomenon of this nation alone. These conditions of globalization in developing nations are similar around the world, and the results of this study suggest it is imperative we pay more attention to the relationship between relative deprivation and social problems in developing nations as both the speed of globalization and rate of global inequality continue to increase. In the future, it appears that as countries continue to develop relative deprivation will become an increasingly important way to conceptualize and address poverty and social problems as a whole.

Methodological Relevance

Qualitative research methods are an essential tool for unpacking reference group formation, relative deprivation, and inequality. The use of qualitative methods in conducting this research expands the toolkit which we can utilize to further unpack the relative deprivation theory, the concept of inequality, and the resolution of social problems that may take root there. Primarily, the open-ended interview approach to understanding reference group formation meant that the participants themselves defined their own reference groups, based on their own subjective interpretation of relative deprivation. This is of central importance as previous data has been collected by limiting a participant's expression of salient reference groups to categories pre-determined by the researcher. In the case of this study, salient reference groups²⁸ were self-

²⁸ A few other reference groups such as co-workers, business owners, bosses, neighbors were mentioned by more than one participant, but not extensively enough to signify salience across this group of participants.

selected by participants and included family, peers, foreign tourists, and political figures. Family and peers were discussed as points of reference with no prompting on my part. Given the focus of this thesis, questions about comparisons to tourists were included in the interview guide. However, this question was asked nearing the end of every interview, and nearly 75% of participants whom drew comparisons between themselves and tourists did so prior to being asked about this relationship directly. Not only does this provide more evidence for the salience of family members as reference groups, it suggests that other types of reference group are salient that had not been previously considered important.

Ultimately, the value in approaching reference group formation this way is that when exploring questions of relative deprivation, we ask how people consciously and subjectively compare themselves with others. To understand this then, we must ensure that respondents are able to subjectively choose and define whom that “other” is in any given comparison scenario, and whether it be based on economic or social circumstances. Similarly to what Mangyo and Park (2010) posited, advancing understanding of reference group formation has the potential to unlock insight into the way relative deprivation and inequality effect individual outcomes with respect to economic and social wellbeing. This contribution also holds potential for addressing social problems at the societal level, as Wilkinson and Pickett (2009) suggest that approaches to social problems should be more cohesive, and unified toward reducing relative deprivations in society. This methodological contribution has important implications for successfully addressing social policies in the future. Utilizing these methodologies as a way to approach social problems more cohesively through relative deprivation, we have the ability to develop social policies that:

1. Allow the space for social problems and relative deprivation to be defined and addressed cohesively at the community level as opposed to national level (This is

- particularly important as not all communities in this research expressed the same social problems, feelings of inequality, type of inequality, or desires for skills and/or services).
2. Insist that approaches to social problems be addressed in their own right, as opposed to being strung to economic policies as an afterthought (a common critique of previous Mexican social policies).
 3. Adjust the pure absolutist approach to poverty previously so that it incorporates goals for reducing inequality that has persisted over the last several decades worldwide.

These solutions are drawn in part from the context of Mexican policy history, yet there is value to evaluating the extent to which similar policy contributions might be helpful in other developing nations around the globe. While above I have outlined important contributions to literature, methodology, and policy, caution needs to be exercised when translating these findings to the larger theoretical constructs of relative deprivation and inequality. As with any research, there are limitations to my interpretations and applications of these findings.

Limitations

Limitations of sample ethnicity

My first finding suggests that the way an individual thinks about and defines inequality impacts the way in which they perceive themselves relative to others, and who they compare themselves to. While this may be true, it overlooks a crucial piece of understanding relative deprivation—other factors which may influence participants' perceptions of inequality. Below I will address the way in which the ethnicity of my sample may have influenced individual's perceptions of inequality, and how this limits the findings of this research.

In the late 1980s, Mexico ratified Convention 169 of the ILO, in which “recognizes the social inequality suffered by indigenous peoples and the systematic violations of their citizenship and human rights” and adopted “a clear and detailed outline of specific...rights for indigenous people” (Stephen 1997 p. 19). This was important as it formally recognized the way in which indigenous peoples of Mexico were historically oppressed. However, internal indigenous policy typically failed to incorporate the rights given by the adoption of this convention (Stephen 1997). The redistribution of *ejido* lands to indigenous communities was dropped as a governmental obligation in 1992 (Stephen 1997), and despite the Mexican government’s 20th century social policies targeted specifically at improving primarily indigenous communities, today indigenous Mexican groups are “worse off in respect of poverty, illiteracy levels, gender equity, and basic infrastructure” (Poole et al. 2007 p. 316). Hence, century-spanning inequality between indigenous communities and their non-indigenous counterparts has impacted the disparity that persists between the two today.

It would be remiss to believe that these specific set of circumstances over a prolonged period of time did not impact the way in which the indigenous participants in this study perceived inequality. This does not mean that all of the Mayan interviewees have the same worldviews (indeed Shklarov 2007 suggests that differences within an ethnic group are often overlooked), but it does mean that Mayas share some cultural ties, bonds, experiences, and traditions. The cultural background of ethnic Mayas may have great influence on the way in which their worldview has been uniquely formed in comparison with other Mexican citizens. Indeed, much talk about inequality was interlaced with discrimination, focusing particularly on ethnic discrimination against persons of Maya descent. In addition, the extent to which political disdain emerged in discussions of inequality during participant interviews attests to the important

role historical oppression can play in perceptions of inequality, as one participant called political inequality “the most evil seed” in their community. Furthermore, while Playa del Carmen was the research site which received the highest level of tourism, it was also the research site with the largest number of non-Maya participants, suggesting that perceptions of equality in that community may have been different because there were less participants whom carry the burden of historical oppression on their backs.

Given this historical perspective, it becomes more difficult to unpack the various perceptions of inequality in relation to interactions with tourists. However, it must be noted that perceptions of equality and inequality that focused on discrimination (or lack thereof) were engaged in by both Maya and non-Maya participants across various research sites. So being treated equally or unequally beyond economic status was important to participants outside of their ethnic identification. Furthermore, government frustrations and expressions of political inequality were not bounded to Maya participants either. While ethnicity certainly plays a role in an individuals’ perceptions, this demonstrates that in this case it could not have been the explicit factor shaping participant perceptions about inequality within their community. Nor does it stand to explain the use patterns of tourists as a reference group for self-comparison.

Sample limitations to generalizability

A second limitation of this study design is that the ethnically-limited sample does not allow for these findings to be particularly generalizable. At the national level, indigenous-language speakers make up only 15% of the Mexican population (INEGI 2010)²⁹. In the Yucatán Peninsula, indigenous Yucatec Maya comprise roughly 18% of the population (INEGI 2010). Essentially, the number of indigenous Maya within the Yucatán Peninsula is relatively large

²⁹ Indigenous peoples are identified by the Mexican census by their ability to speak an indigenous language. Furthermore, this percentage represents all indigenous minorities and is not limited to individuals of Maya descent.

compared to most of Mexico, yet they are still overwhelmingly an ethnic minority. As Maya culture is a unique piece of both the historical and present day Yucatán Peninsula, it is impossible to suggest that perceptions of inequality and the development of tourists as a salient reference group would emerge in the same way across all communities in the Yucatán Peninsula, or in other major tourists destinations in Mexico and beyond. While I cannot (and would not) say that in every developing nation around the world interacting with foreign tourists impacts locals the same way it has here, the results do indicate that in some developing nations the presence of Westerners can influence the development of individual's world views and perceptions, particularly in terms of inequality and wealth disparity.

Furthermore, issues of generalizability are not particularly problematic as the goal of qualitative research and this study is not to generalize these specific findings to a larger population. Conversely, the goal here is to utilize these findings to suggest that perceptions of inequality and the salience of a particular reference group is quite dependent upon a person's interactionary landscape. The more general point is that there are likely many different types of salient reference groups in existence beyond those which the relative deprivation literature has at this point determined to be salient.

Limitations of data validity

Another issue to consider before reaching conclusions about participant's perception of inequality is the way in which participants—particularly those working in the tourism industry—may have altered their interview responses in order to present their community in a positive light to an outsider (me). For example, given that Playa del Carmen has a reputation to maintain in order to continue to prosper economically; it is plausible that individuals in the tourist industry whom I interviewed talked frequently of the equality that existed in their community because

they felt that this was an important piece of the city's reputation to maintain. However, it is not clear that this was the case as several respondents noted that despite individuals being treated equally, economic and resource inequality persisted in Playa del Carmen. In fact, Olivia hinted at this in a quote I discussed previously, suggesting that there is a particular area north of town where many people live in tents and lack stability. Furthermore, exposing tourists to internal problems of the city did not seem problematic, as one sign that I found posted on a telephone poll in the city read:

TOURIST FRIENDS

We apologize for the bad state of our streets and avenues. Our municipal and state governments do not listen, respect agreements or work hand in hand with those of us who work for you and thanks to you. We 'playenses' greet you with open arms, happy holidays!"

A final reason to doubt the idea that respondents were simply putting on a good face for the sake of their city's reputation can be attributed to the different responses gleaned from participants in Playa del Carmen and Pisté, discussed above. If this were indeed the case, we would expect to see similar responses in Pisté about experiencing an overwhelming amount of equality within their communities. However, as the findings suggest, this simply was not the case.

Interpretationary Cautions

Finally, there are limitations to the extent to which I conclude that perceptions of inequality and reference group formation are both fluid and a product of the expanse of an individual's interactionary sphere. My study exists as more of a snapshot of reference group formation at the particular time that this research took place (December 2011-January 2012). This limits the extent to which I am able to speak to the fluidity of individuals' interactions and their salient reference groups, as my data is not longitudinal over a period of time. It also challenges my authority to suggest perceptions of inequality and reference groups may be fluid.

However, within this study, I have been able to examine the way in which participant responses have differed in communities with varying degrees of exposure to tourism and tourists. Given that tourists were utilized most frequently as a reference group in communities where tourism is most prevalent suggests that reference groups may very well be fluid across geographical space, which of course factors into what our interactionary space consists of.

Future Research

As I have suggested above, the ethnic homogeneity of my research sample presents two hurdles to my findings. First, the limited sample makes it difficult to generalize my findings to a larger or different population. Second, it makes it difficult to know the extent to which the historical oppression of Maya ethnic groups in Mexico influenced participants' perceptions of inequality. This calls into question the impact that interactions with tourists might have on perceptions of inequality in comparison to longstanding, systemic discrimination. In order to better understand the impact that interactions with tourists have on reference groups and relative deprivation, future research must incorporate a more diverse and representative sample within communities of interest. This would also enhance the ability for future researchers to generalize their findings across different communities and more broadly at a state, regional, or national level.

Another direction for future research is to extend the use of qualitative methodologies in exploring the extent to which reference groups and their formation may be becoming more fluid and contextually based in a constantly changing world; particularly as interactions with tourists increase. A key to overcoming the constraints of this thesis in the pursuit of this knowledge is to increase the research time spent in the field. Not only would this diminish the concerns about the validity of this data mentioned above, it could also allow for changes in perceptions of inequality

and reference group formation to be studied over a longer period of time—generating a better understanding of the extent to which perceptions of inequality and reference group salience may be fluid. This longitudinal aspect could be achieved via ethnographic field studies that utilize long-term observation, participation, and/or immersion in a community that serves as a global hub; all methods that have yet to be fully integrated into studies that seek to understand relative deprivation and reference group formation. In terms of understanding the role that interacting with tourists plays in relative deprivation and reference group formation, it would be extraordinarily useful to identify potential up and coming tourist destinations wherein baseline community data on inequality could be gathered initially and re-visited as a community's role as a tourist hub expanded over time.

A crucial component of relative deprivation literature is the formation of reference groups for self-comparison. As noted, I found that almost exclusively in communities that serve as tourist destinations tourists were used as a salient reference group for self-comparison. More importantly, it is quite likely that increasing abilities to partake in diverse interactions as a result of globalization means that reference groups extend well beyond tourists to include other salient reference groups which have yet to be identified. Future research should look at the way in which we can manage or assess reference group formation in an increasingly geographically mobile world.

Not only do we need to expand our understandings of salient reference groups, in order to make significant headway in addressing the social problems tied to inequality, relative deprivation, and relative poverty we need to expand the depth of our knowledge of perceptions of relative deprivation and inequality. In the future, continuing to understand the different ways in which people conceptualize inequality and experience relative deprivation could be used to

create better evaluations of the impacts of both inequality and relative deprivation. More importantly, the more we know, the better we will be able to address the social problems that evidence suggests are tied to inequality and relative poverty.

Conclusion

The results of this thesis suggest that the usefulness of a relative approach to deprivation is pertinent past a certain point where access to basic needs has been achieved. If we revisit the broader literature on relative deprivation, previous research suggests that with greater inequality comes more social dysfunction in a society, with health problems being of utmost significance (Wilkinson and Pickett 2007). Wilkinson and Pickett (2007) also see the prominence of these problems as an indication that larger gaps of inequality are “partly responses to the burden of relative deprivation, and inequality increases that burden,” (p. 1974). Due to the ties that many social problems have to relative deprivation, Wilkinson and Pickett posit that ties of inequality may run deeper in society than most people imagine. Their research indicates that income inequality may be “central to the creation of the apparently deep-seated social problems associated with poverty, relative deprivation, or low social status,” and that many of these problems can be caused by social stratification, yet they can also be “amenable to changes in income distribution,” (Wilkinson and Pickett 2007 p. 1965).

Yet in this study, it was not only inequality as it existed in income distribution that tended to impact whether or not individuals perceived themselves as equal or unequal to others. How individuals compared themselves to others depended on how they interpreted and conceptualized equality and inequality. This ties back to the important methodological contribution I have made by utilizing open-ended, qualitative methods to get at participants’ subjective understandings of concepts founded under the presumption of subjective understanding to begin with: relative

deprivation and reference group formation. It is especially important given the above premise relating economic inequality and social problems, suggesting that these problems are “amenable to changes in income distribution,” (Wilkinson and Pickett 2007 p. 1965). It may be that in some cases, the subjective interpretation of inequality means an individual is more distraught by disparity that extends beyond a pure economic form. If this is the case, income distribution in relation to relative deprivation may not be the most salient solution to addressing the relationship between relative deprivation and individual and community health and wellbeing.

In this study, I examine the impact that increased interactions with tourists have on participants’ perceptions of relative deprivation and reference group formation. Admittedly, this appears as narrowed, fringe sort of approach to understanding conceptualizations of reference group theory and relative deprivation. Yet it is the broader reach and implications represented in the findings of this study that the reader must bear in mind as being of the utmost importance moving forward. Increased tourism is perhaps the most visible and easily identifiable piece of globalization. In this study, I rely on interactions with tourist to serve as an operational definition of globalization. I recognize that tourism is just one small piece of the extensive globalization puzzle, just as the finding that tourists serving as a salient reference group extends only a small piece of our understanding of relative deprivation theory. However, the broader recognition that global mobility does impact the way in which an individual forms perceptions of inequality and salient reference groups for self-comparison extends the results of this study beyond interactions with tourists. Essentially, the salience of tourists as a reference group represent one of a multitude of ways increased global interactions under the umbrella of globalization influence reference group formation. This suggests that there are likely a variety of ways that a developing nation’s move toward a more globalized society impact individuals perceptions of inequality,

and that there are a plethora of individuals and groups that can emerge as salient reference groups as a result of the globalization process. Furthermore, current perceptions of inequality and salient reference groups are likely to continue to change moving forward.

Countries on the path to development are likely to need a more relative and flexible approach to deprivation to curb inequality and social problems than past poverty alleviation programs have allowed for. This would be especially true if we take into account the extent to which day-to-day interactions may be diversifying as a country develops and urbanizes. In these cases, it is imperative we breakdown how inequality and relative deprivation play out across peoples' changing interactionary spheres to achieve a clearer understanding of the link between inequality and social problems. Moving forward, building on these advancements of relative deprivation and reference group theory may prove to be integral to enhancing both individual and societal wellbeing, and so must continue to be examined carefully as part of the solution to decreasing inequality and relative poverty around the globe. In closing, our capacity to address social problems may essentially depend on our ability to narrow deprivation gaps, which begins with striving to continue to subjectively and contextually understand and refine how relative deprivation might be perceived, acted out, and defined—surely a complex task in times of rising inequalities.

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Appendix 1: Verbal Consent to Participate in Study³⁰



Hello. My name is Stacia Sydoriak, and I am asking you to participate in a study for Colorado State University. Dr. Lynn Hempel is the Principal Investigator of the study. I am the Co-Principal Investigator. This is Jamie Emilio Perez, he is my translator.

The purpose of this study to learn about the way people in (insert town), Mexico see and think about the world. You are being invited to take part in this study because you are a member of this community.

This interview will be done in-person and in a location that is most comfortable for you. The interview will last about 30 minutes and will be tape recorded with your permission.

There are no known risks involved in participating in this study. It is not possible to identify all potential risks in research procedures, but the researcher(s) have taken all precautions to minimize any risks. There are no direct benefits to participating in this study.

All research records will be kept confidential, and your identity will never be connected to the interview. If this research is published, we will use a pseudonym to ensure you are not identified. No identifying information about you will ever be used. We will make every effort to prevent anyone who is not on the research team from knowing that you gave us information, or what that information is. For example, your research records will be kept in a locked file on my personal computer, which only I have access to.

Your participation is voluntary. If you decide to participate in the study, you may decide to stop participating at any time without penalty. If any of the questions make you feel upset, sad, or frustrated you may choose to stop answering the question, skip a question, or end the interview at any time.

Before you decide whether to accept this invitation to take part in the study, please ask any questions you might have. Later, if you have questions about the study, you can contact the investigator, Stacia Sydoriak by phone: 570-447-4840 or email: stacia.sydoriak@gmail.com or Dr. Lynn Hempel at Lynn.Hempel@colostate.edu. You may also contact Jamie Emilio Perez at journeywithjj@hotmail.com. If you have any questions about your rights as a volunteer in this research, contact Janell Barker, Human Research Administrator, at 970-491-1655.

Your agreement acknowledges that you have heard the information stated and agree to participate in this study. Would you like to participate in this study?

This recording will not be shared only be used for research purposes by the researcher. Do you agree to an audio recording of this interview?

This consent form was approved by the CSU Institutional Review Board for the protection of human subjects in research on 12/12/2011.

³⁰ This is the English version that was translated into Spanish. The Spanish copy is available upon request.

Appendix 2: Maps of Research Sites

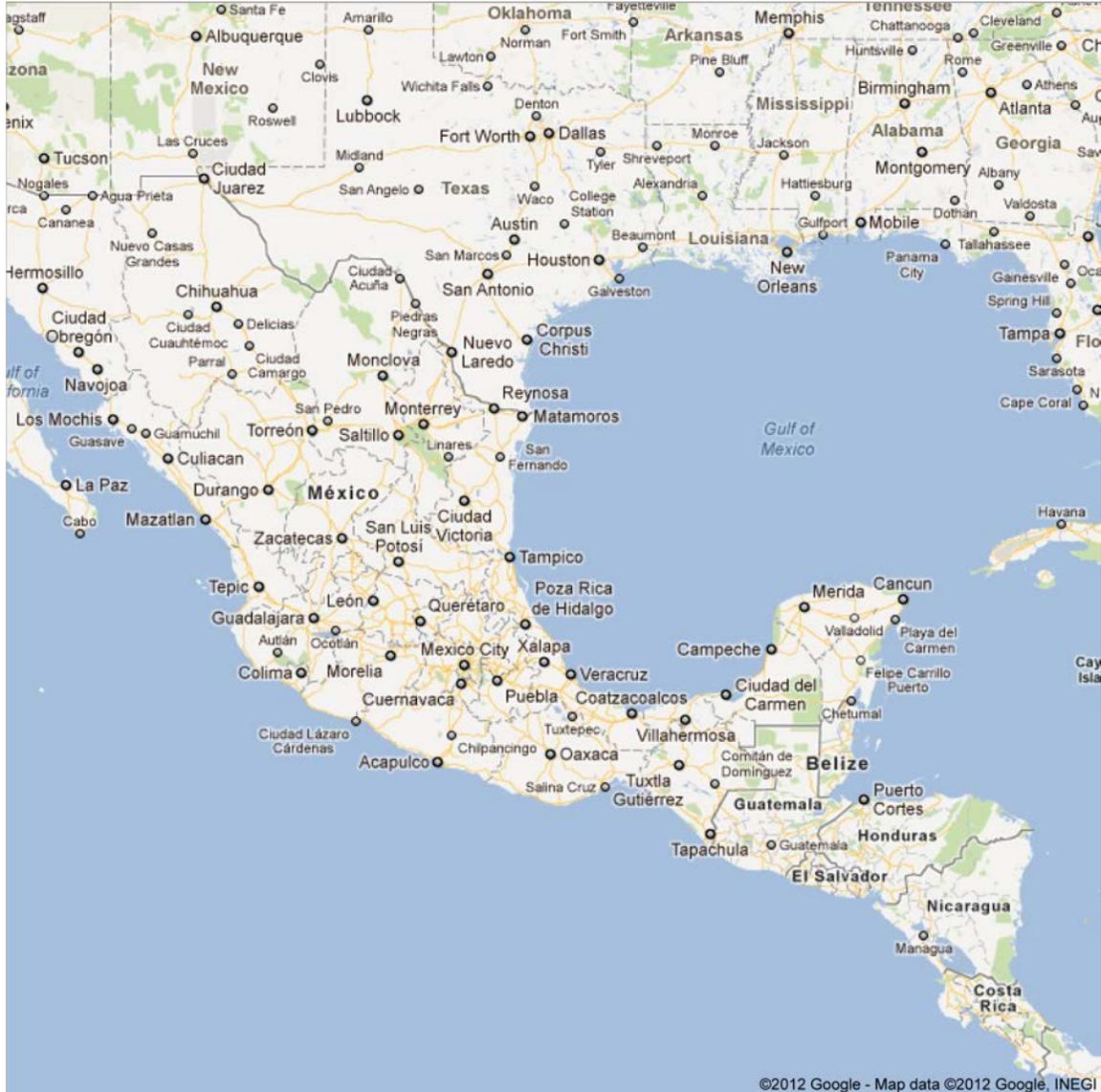


Figure 5: Map of Mexico



Figure 7: Overview map of research sites 1-4

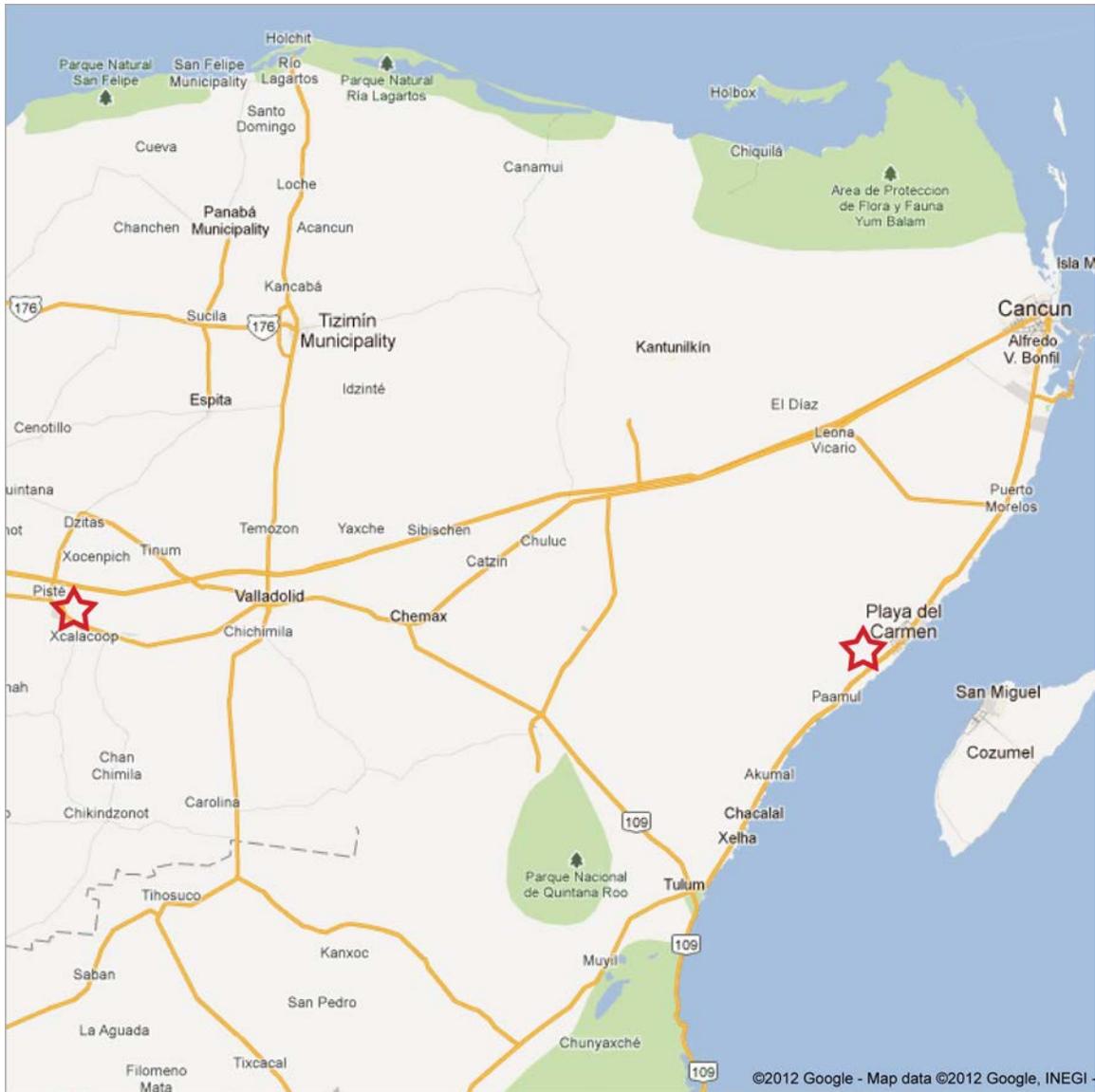


Figure 8: Overview map of research sites 5-6

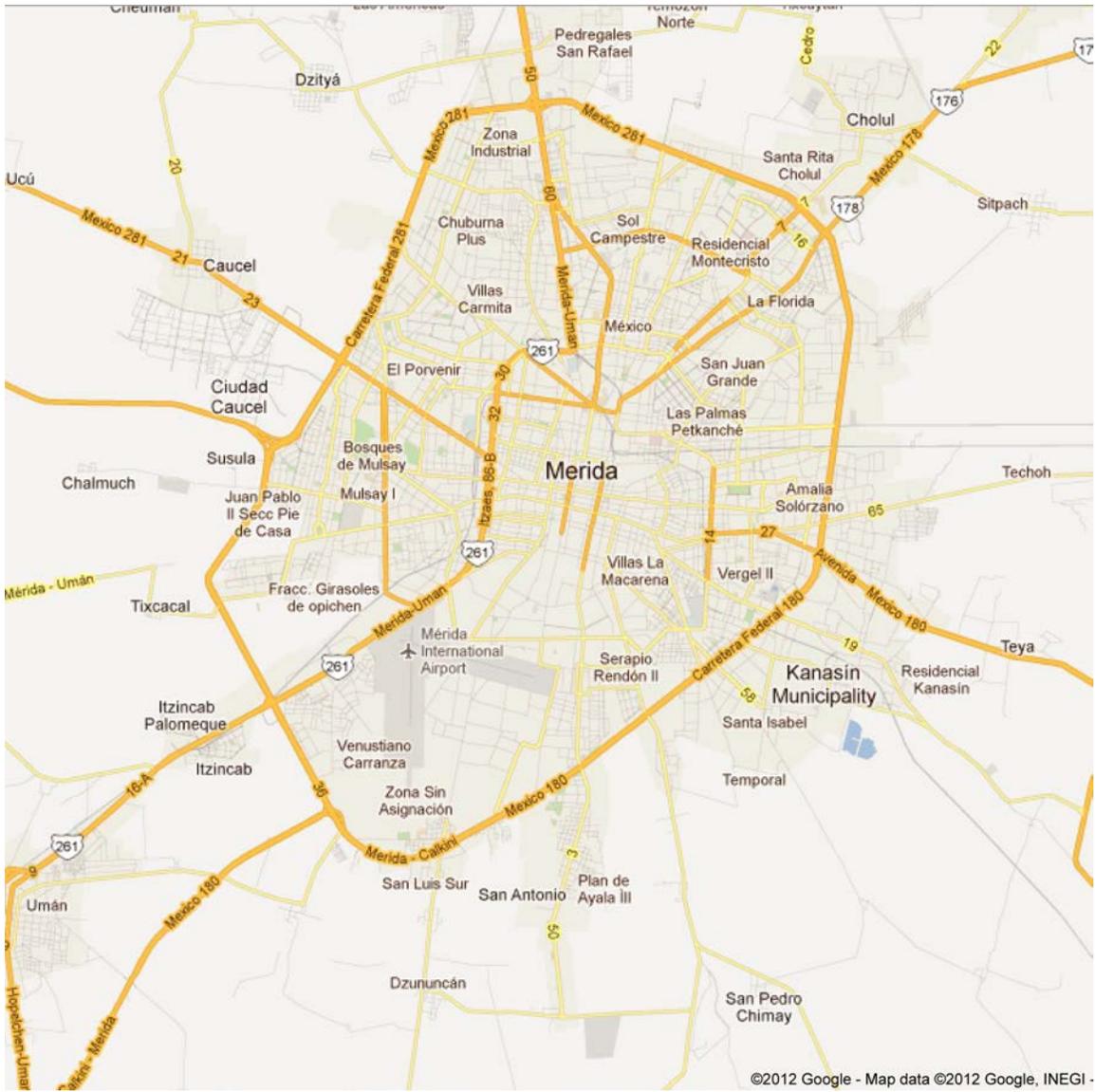


Figure 9: Map of Mérida

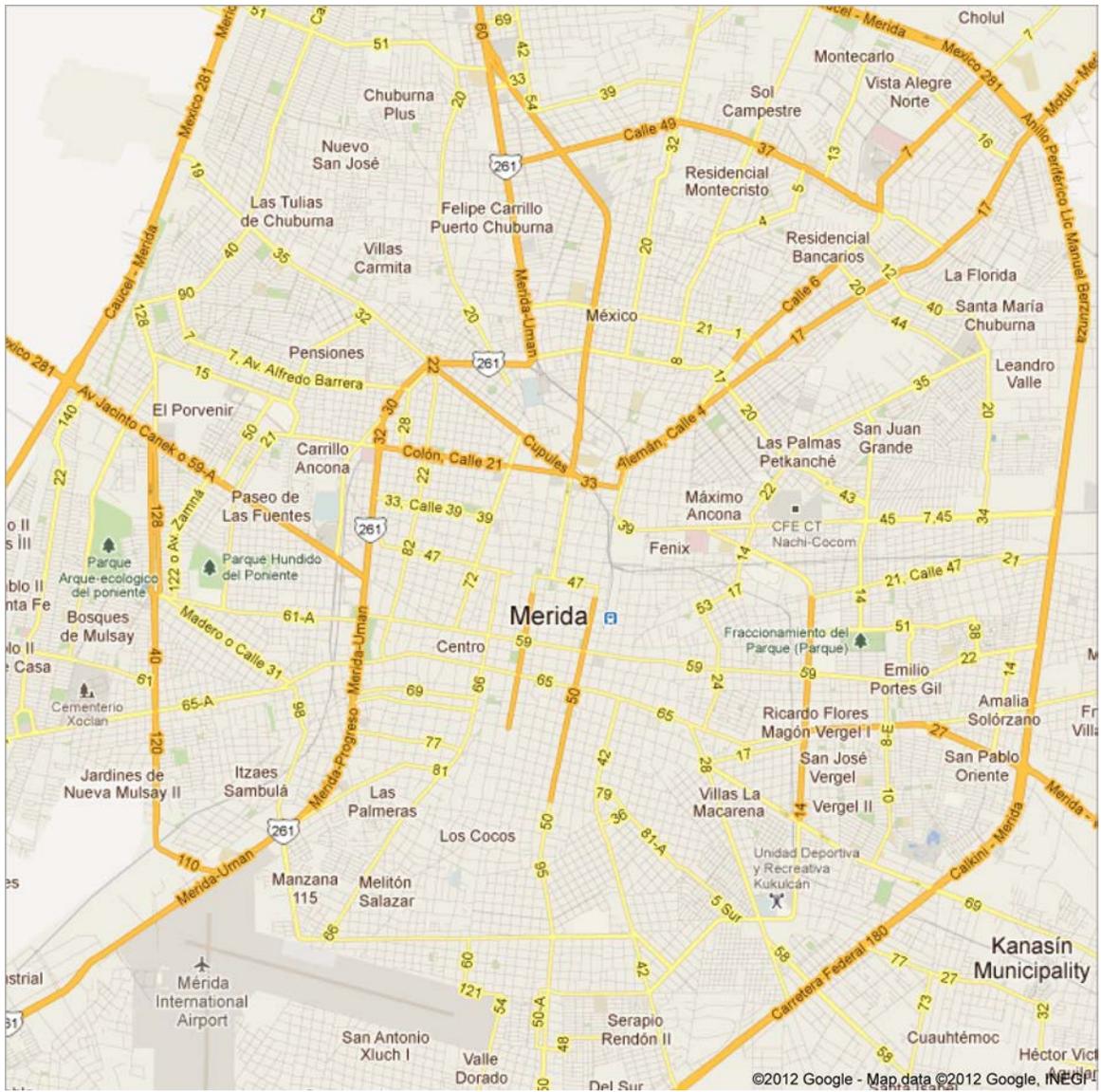


Figure 10: Zoom map of Mérida

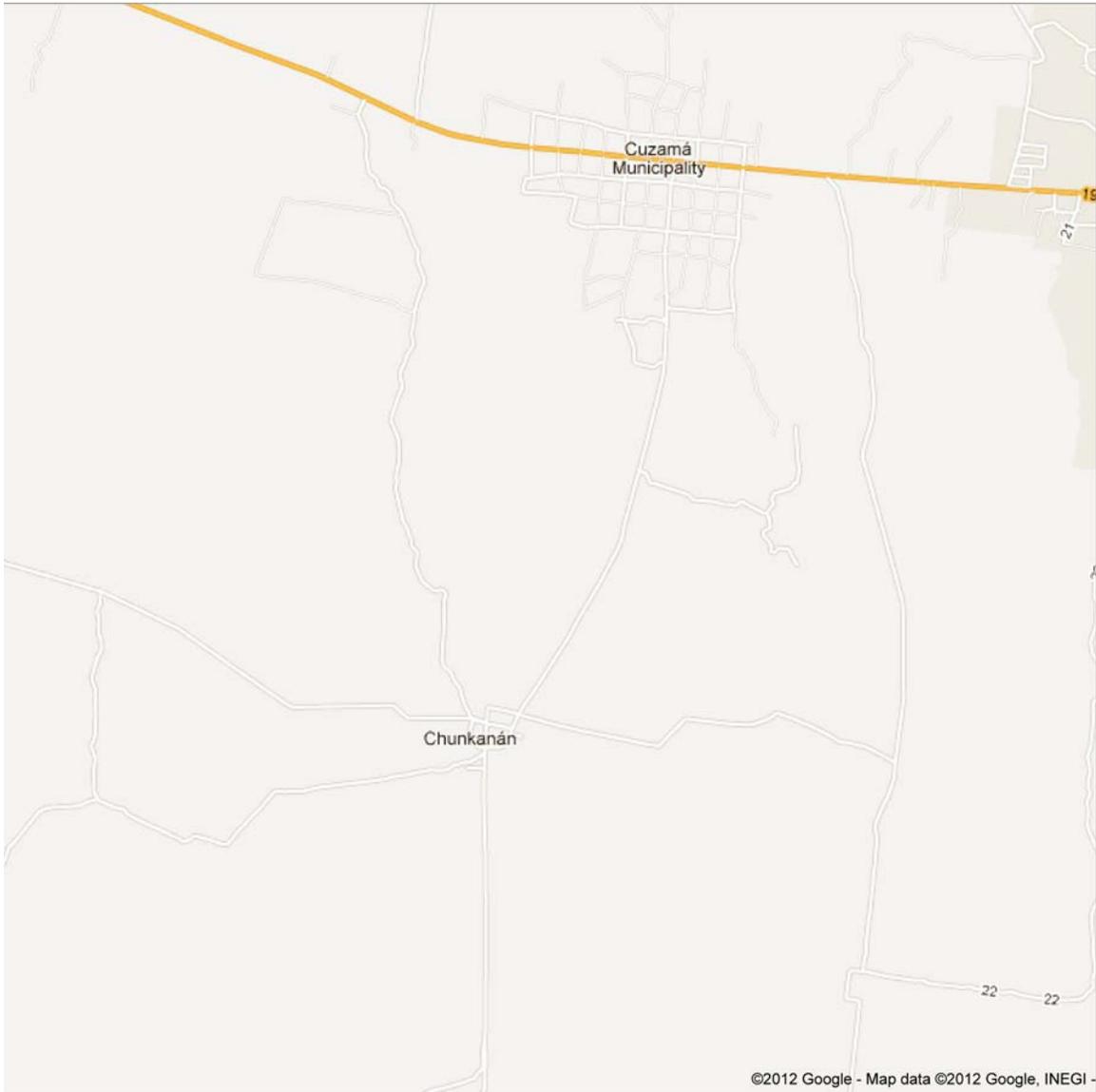


Figure 11: Map of Chunkanán

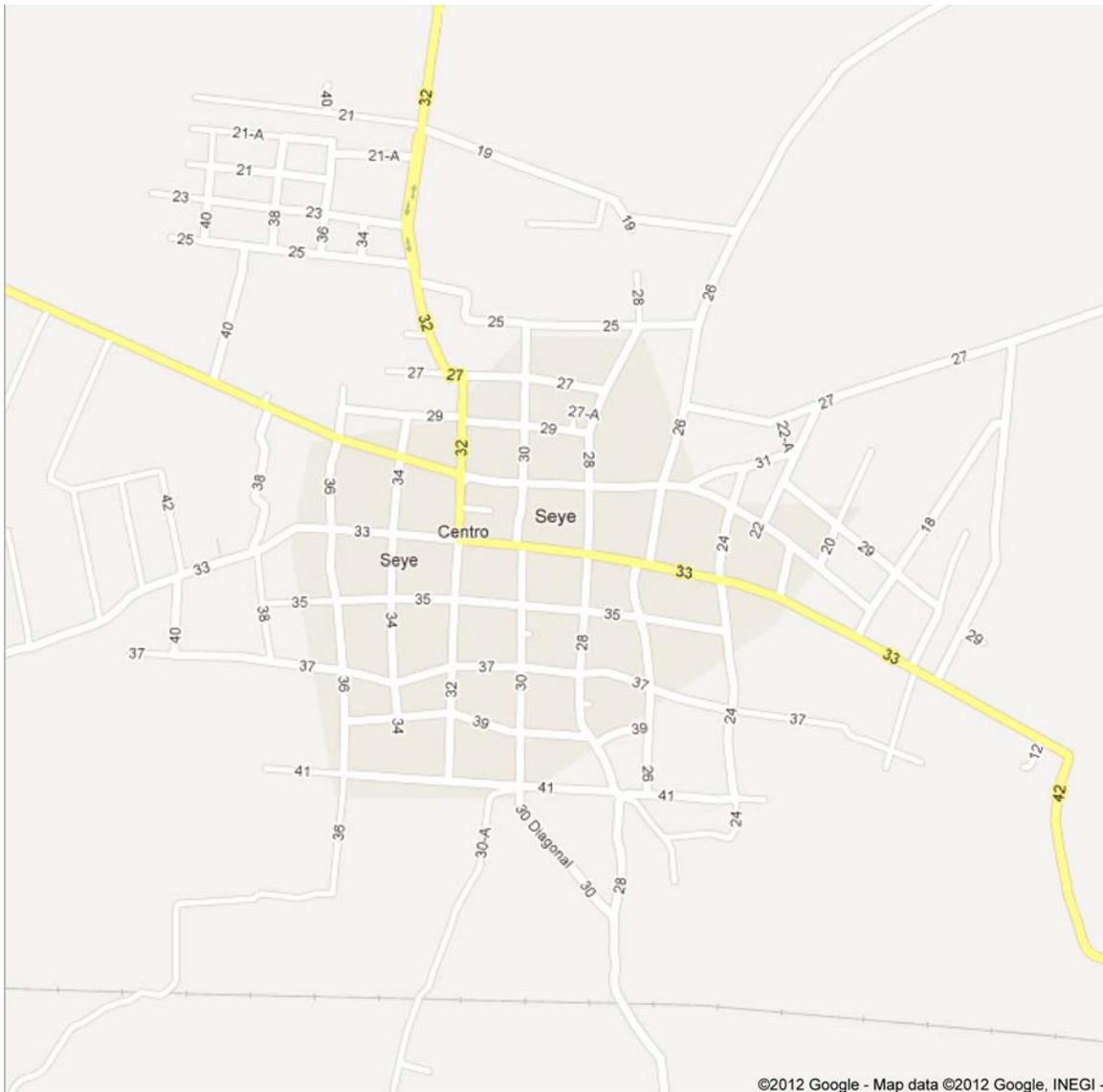


Figure 12: Map of Seyé

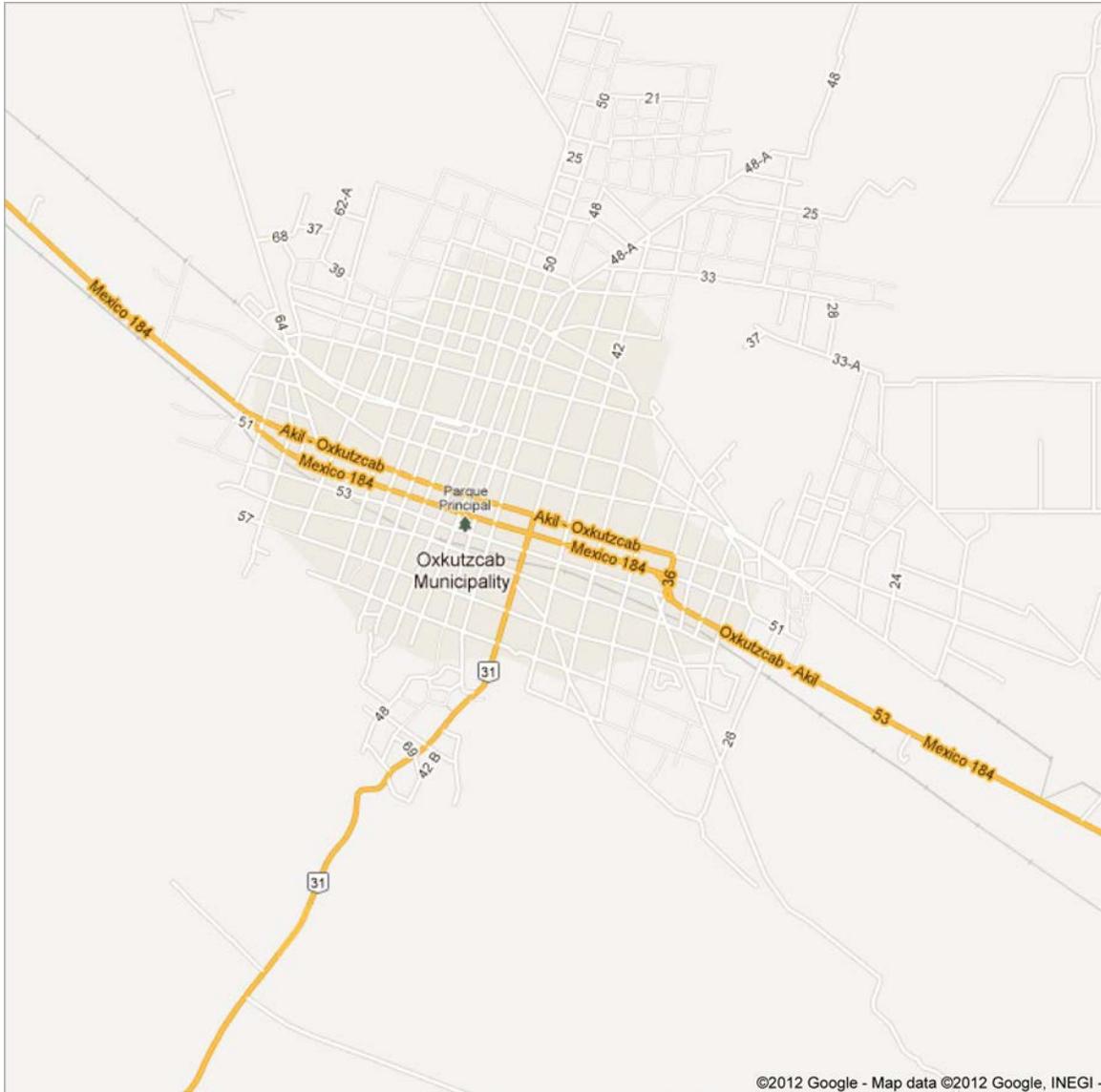


Figure 13: Map of Oaxtepec

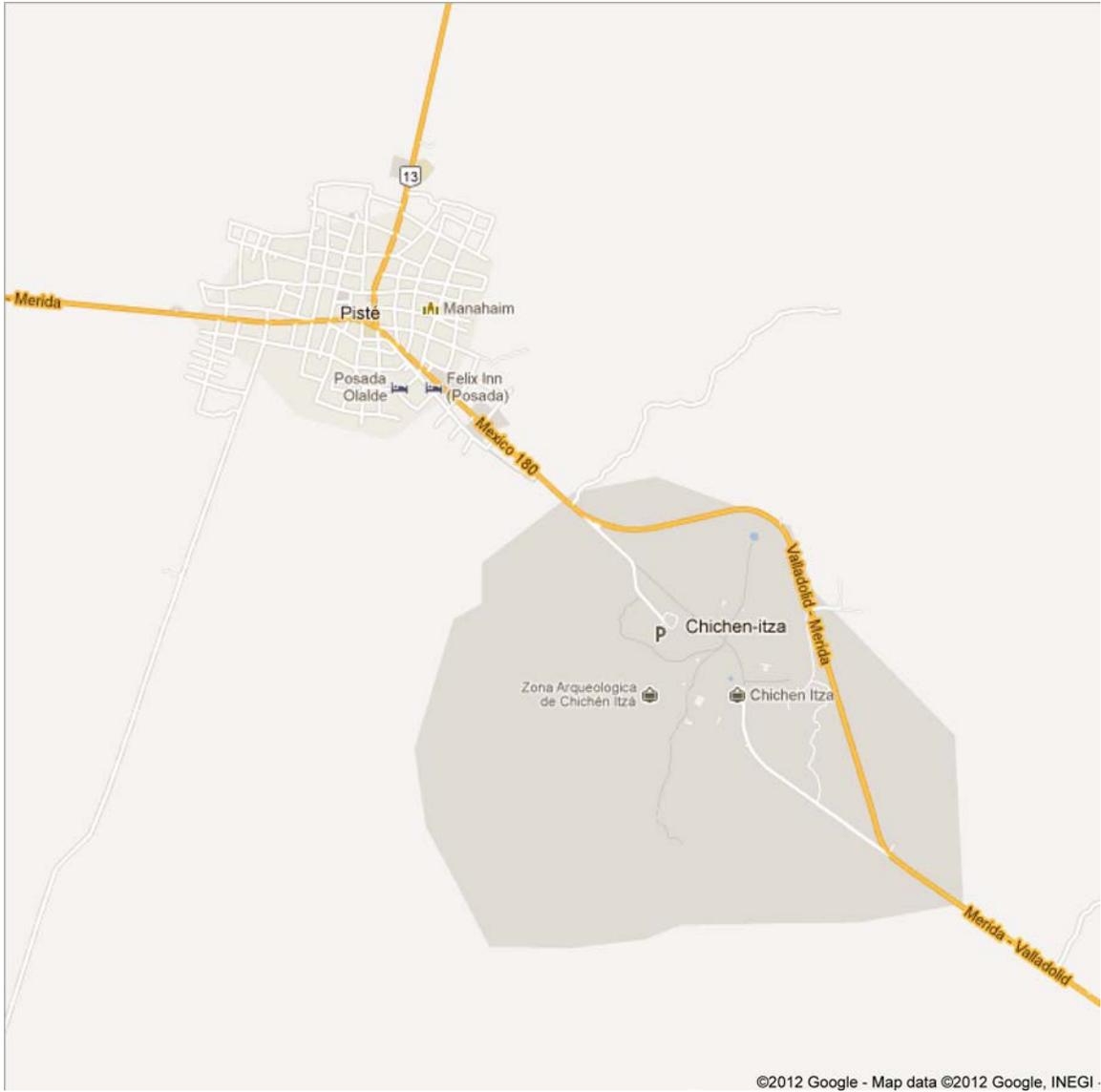


Figure 14: Map of Pisté/Chichen-Itzá

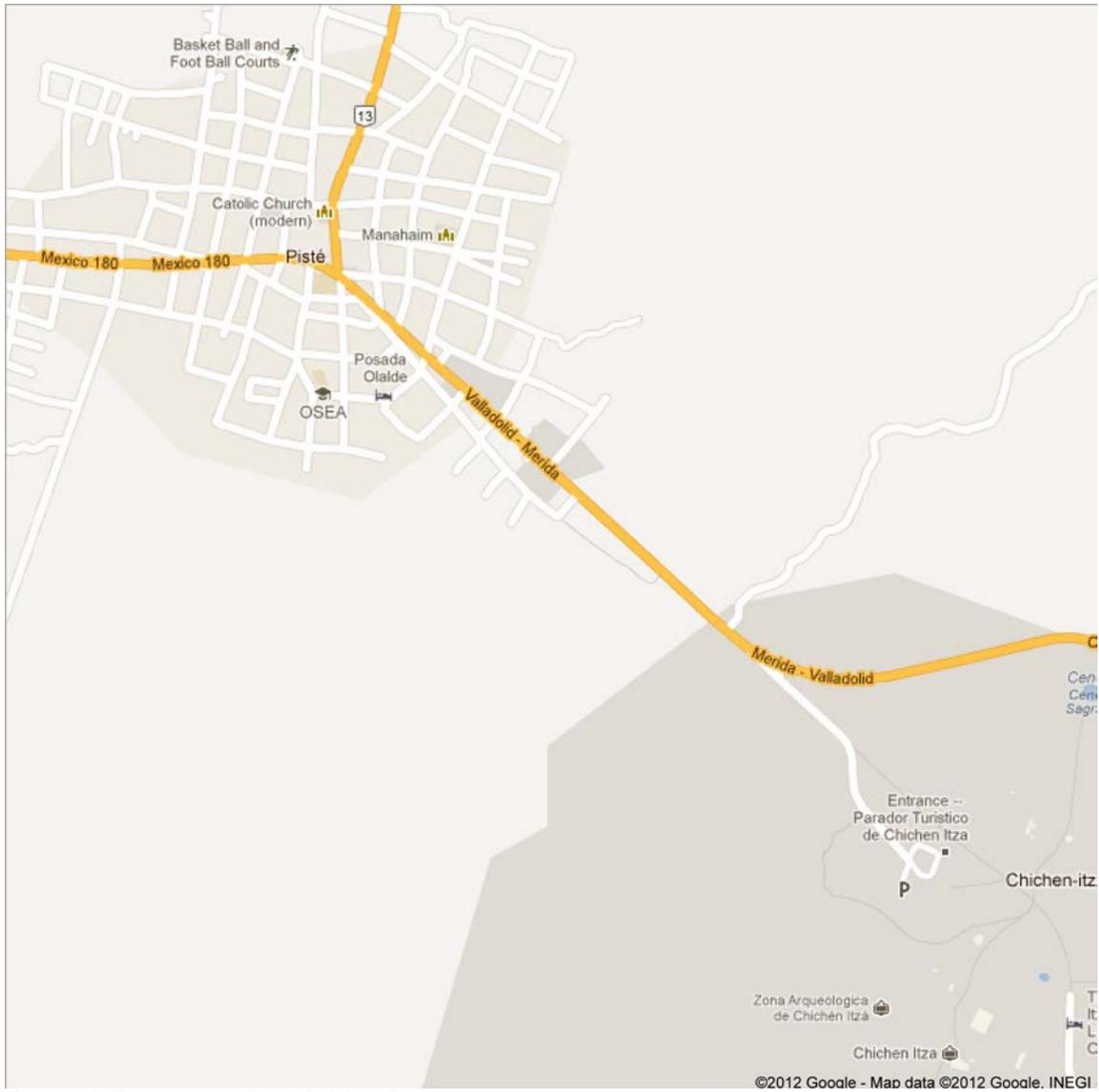


Figure 15: Zoom map of Pisté/Chichen-Itzá

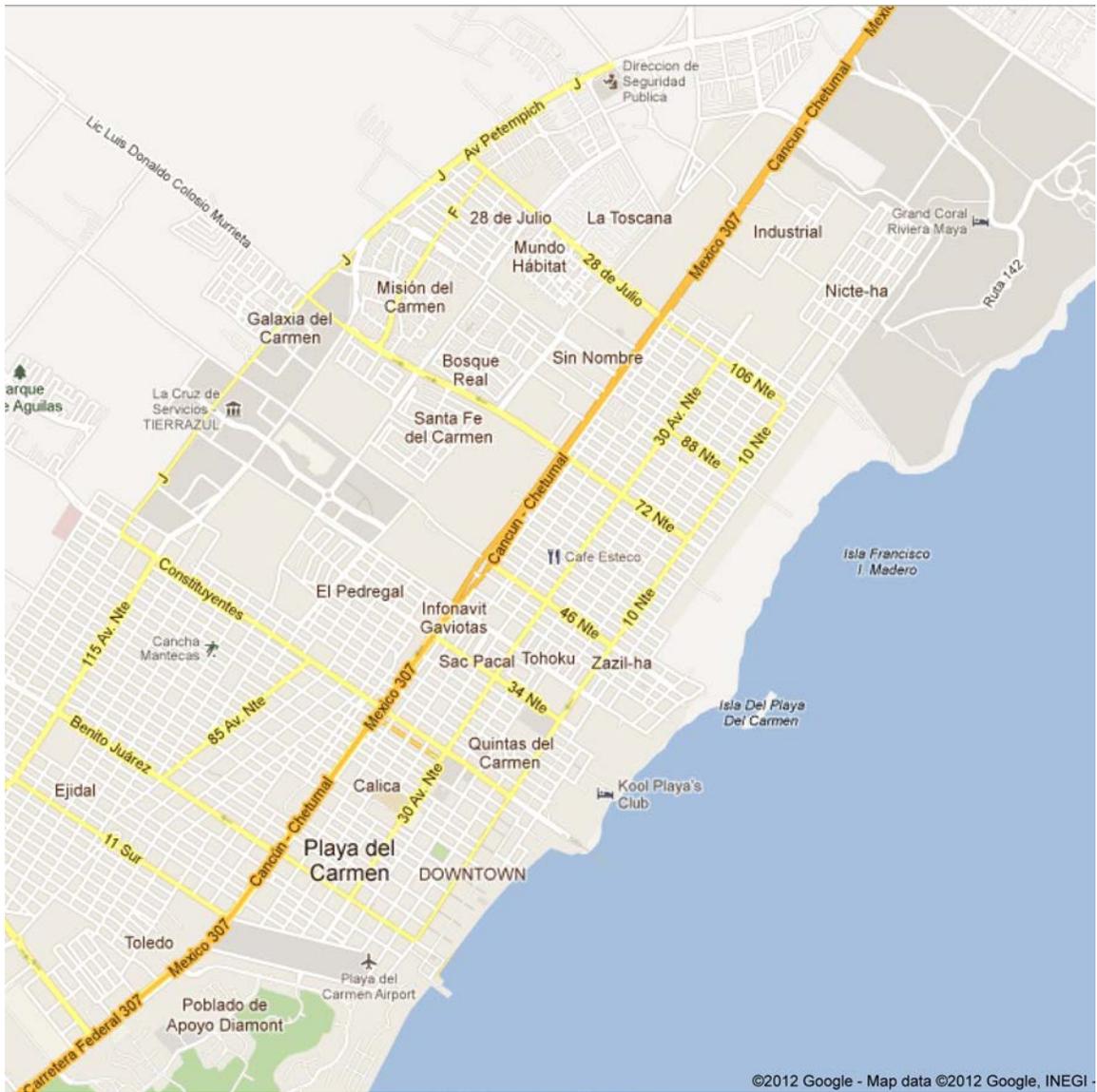


Figure 16: Map of Playa del Carmen

Appendix 3: Entry Letter to Jamie Emilio

from: Stacia Sydoriak stacia.sydoriak@gmail.com
to: journeywithjj@hotmail.com
date: Wed, Sep 28, 2011 at 12:59 PM
subject: In need of a translator for research, recommended by Jose Alejandro Sandoval Erosa
mailed-by: gmail.com

Hi Jamie Emilio,

My name is Stacia Sydoriak and I am writing to you because I am planning on traveling to the Yucatán Peninsula to do research over this winter. My Spanish tutor, Jose Alejandro suggested that I get in touch with you. He says you have worked as a travel guide in the area for many years and that you speak English, Spanish, and Mayan. He had many good words to say about you and I was hoping you might be able to assist me with my research project.

My Spanish skills are intermediate, but given that I need to have complete accuracy I would like to hire you (or someone else you might suggest) to work as a translator for my interviews. My research project goal is to examine the way individuals in rural and urban areas see themselves in terms of poverty and development. Particularly, where do individuals see themselves who work in the tourism industry (perhaps hotel workers in Cancun) on the scale of poverty? Do their daily interactions with foreign vacationers change how they see their own living situations? How is this different than the way individuals in smaller rural communities with less outside interactions view their own place in the world?

I would like to conduct this research over the course of several weeks between December 2010 and January 2011. Is this something you would be interested in assisting with? If not, do you know someone else who might be interested in assisting me? I would prefer to work with a native Spanish speaker. In addition, how much on average would it cost for you to work with me?

I hope that all is well with you and your family, and I look forward to potentially working with you in the upcoming months.

Thanks for your time,

Stacia Sydoriak

Appendix 4: Interview Guides

Original Guide³¹

Tell me about your family members that live in the house with you. (Prompts below)

- a. How old are they?
- b. How many of them work?
- c. Where do they work?
- d. What expectations do you have for your children in the future?
- e. Who do you aspire your children to be like?
- f. Where do you work and what does this involve?
- g. What expectations do you have for yourself?
- h. Who do you aspire to be like?

1. When you think about your self in comparison to others who do you typically compare yourself to? (If asked, prompt economically, socially)

Interviewer introduces a scale that shows different ways societies are organized (i.e. pyramid with very few being at the top, upside down pyramid with very few at the bottom, an even distribution between bottom, middle, and top, etc).

2. These diagrams show different kinds of societies. Please read the descriptions and decide which you think best describes (the group they compare themselves to in Question 1, below it is called a reference group)?

3. Where do you place yourself on this pyramid? Who else is in this position? Who is in the others?

4. Has this position changed over your life? If so, how?

5. What are some of the benefits about being here (position)? What are some of the disadvantages of being here? Do you think you would be happier in a different position? Why or why not?

6. If you were to choose a different type of society to live in, which would you choose? Why?

7. How do you think your (reference group fill in here) could become this kind of society?

8. Do you ever compare yourselves to tourists? Migrant workers? People you see on television or in the news? Anyone else? In what ways?

9. Interviewer shows scales again. Which one of these best describes (your town)? Which best describes Mexican society? Which best describes the world?

10. Does your current income (or economic position) restrict you from the things you need? If so, in what ways?

³¹ This is the English version that was translated into Spanish. The Spanish copy is available upon request.

11. Poverty Questions:

- A How would you define poverty?
- B Does poverty exist in your (reference group)?
- C How do you know if someone is living in poverty?

Demographics questions:

- a. What year were you born?
- b. Sex (Researcher will identify)
- c. Race-Ethnicity Identification
- d. Where do you consider home?
If different, what brought you to city X.
When did you leave?
How often do you go back and for how long?
How long have you lived here in (current location)?

12. Is there anything I should have asked you but didn't? Is there anything you'd like to add?
Do you have any questions?

Final Interview Guide³²

1. Where were you born? What year were you born?
2. Where do you live now? **Have you always lived here? If not, where else have you lived?**

If different, what brought you to this location?
How long have you lived here?
How often do you go back and for how long?
3. Tell me about your family members that live in the house with you. (Prompts below)
 - i. **How many people live in your house with you?**
 - j. How old are they?
 - k. How many of them work?
 - l. Where do they work?
 - m. Do you have children? **If not, go to letter Q**
 - n. What expectations do you have for your children in the future?
 - o. How are things different for your children from when you grew up?
 - p. What kind of people do you hope your children will be?
 - q. Where do you work?
 - r. How long have you worked here?
 - s. What activities do you do at work?
 - t. Who is a person you admire or hope to be like?
4. **What kind of life would you like to live?**
5. **What kind of things would you like to have?**
6. **What kind of opportunities would you like to have?**
7. **Who specifically do you see or know that has the type of life, things, or opportunities you would like to have?**
8. What do you like about living in your town?
9. What problems do you believe you have in your town? How do you think these problems could be solved?
10. In your town, are most people in the top, middle, or bottom socioeconomic position? Why?
 - a. **How would you describe the people in the top?**
 - b. **How would you describe the people in the middle?**
 - c. **How would you describe the people in the bottom?**
11. In your town, what socioeconomic position do you consider yourself, and why?

³² This is the English version that was translated into Spanish. The Spanish copy is available upon request.

12. What are some of the benefits about being in this socioeconomic position? What are some of the disadvantages of being here? Do you think you would be happier in a different position? Why or why not?

13. Has this situation changed over your life? If so, how or why?

14. Does your community have inequality or discrimination? What type or against who? How do you know? Do you think this causes any problems? What type of problems does it cause?

How would you describe gender relations in your community? Good, bad, why?

15. In Yucatán, are most people in the top, middle, or bottom socioeconomic position? **Why?**

16. In Mexico, are most people in the top, middle, or bottom socioeconomic position? **Why?**

17. In the world, are most people in the top, middle, or bottom socioeconomic position? **Why?**

18. Does your current income restrict you from the things you **need**? If so, in what ways?

19. How do you think the lives of migrant workers are similar or different to your own? How often do you think about these differences?

20. How do you think the lives of tourists are similar or different to your own? How often do you think about these differences?

21. How do you think the lives of people you see on the news or television are similar or different to your own? What are the people in particular you think about?

If you could live someone else's life for a day, who would it be, and why?

22. Poverty Questions:

A How would you define poverty?

B Does poverty exist in (your town)?

C How do you know if someone is living in poverty?

D What do you believe is the cause of poverty?

23. How many years of education do you have?

24. If you could continue education, what would you like to do, and why?

25. Is there anything I should have asked you but didn't? Is there anything you'd like to add? Do you have any questions?